



Heritage Heights NID #5

***Reinvent Where You Live Heritage Heights Your Destination
Neighborhood***

NEIGHBORHOOD IMPROVEMENT DISTRICT NO. 5

**HERITAGE
HEIGHTS**

**2020
OPERATING PLAN**

September, 2020

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I. INTRODUCTION

A. Background

In 2006, the State of Wisconsin signed into law, the 2005 Wisconsin ACT 186, a legislative declaration created to give Wisconsin municipalities (i.e., cities, villages and towns) the power to establish one or more Neighborhood Improvement Districts (NIDs) within their community. Neighborhood Improvement Districts focus on neighborhoods composed exclusively of large multifamily housing units or mix of businesses and multifamily housing. An assessment methodology is developed to allow the assessable residential and commercial properties within the geographic area to contribute to programs aimed at neighborhood lighting, distinctive signage, and pocket-parks, enhanced public green spaces and other activities as approved by the NID Board. The ACT was drafted similar to the business improvement district.

The Heritage Heights Neighborhood Improvement District #5 was created in 2016 (Resolution #160892), for the purpose of revitalizing and improving the neighborhood area on Milwaukee's Northwest side location (see Appendix A). This document is the Operating Plan for the Heritage Heights District #5. The NID proponents prepared this Plan with technical assistance from the City of Milwaukee Department of City Development.

II. DISTRICT BOUNDARIES

Boundaries of NID #5. Discussion ensued on the properties to be included in the Neighborhood Improvement District. It was decided that included properties would be those properties fronting Metro Boulevard (south side), those properties fronting 107th St., specifically 6577 N. 107th, then 6755 N. 107th St. North to West Metro Blvd., and properties on N108th St, N109th St., N110th St. N112th St., Coventry Ct., N113 St., N114th St., W Green Tree Rd., W Daphne St., W. Heritage Dr., W. Sanctuary Dr., Meadowcreek Ct., and W. Meadowcreek Dr. The 193 included properties are shown in the attached spreadsheet

There are 210 properties within the NID #5 and the current assessed value of these properties is \$72,358,600.

III. OPERATING PLAN

A. Plan Objectives

The objective of NID #5 is to: To improve and maintain Storm Water Efficiency including replacement of water laterals, old piping, low-flow fixtures, storm water maintenance including backyard swales, and other necessary water efficiency improvements.

To assist with Lawn Appeal including our mailbox project, community lighting, and other lawn appeal projects.

To ensure Code Compliance including all repairs necessary to remedy an existing code violation.

To provide Safety Improvements including, a neighborhood surveillance camera system (i.e. Ring neighborhood) get to know your neighbor, and other safety projects.

To increase our Entrance Appeal including improvement of the monument and grounds with LED lighting on the monument and other aesthetic enhancements.

To assist and generate vehicles that support civic engagement, generate new cultural events or green spaces in the neighborhood to drive community change.

To assistance with our annual Summer Social including our 21th year celebration; along with other neighborhood community parties/holiday events and community building activities.

B. Activities – 2020

Principle activities that will be engaged in/continued by the NID during the 2020 year of operation will include:

- a) Storm Water Management continued maintenance, necessary repairs and insurance of area unobstructed water flow.
- b) Taxes, maintenance and upkeep of the land surrounding the monument area at the entrance of the subdivision.
- c) Secure and finalize Lighting for the monument
- d) Explore the possibility of securing and placing a land monument at the subdivision rear entrance
- e) Hosting a minimum of two (2) community engagement and building subdivision activities
- f) NID Facebook page fine-tuning development
- g) Continued development of policies and procedures that allow for effective enforcement of deed restrictions and neighborhood covenants.
- h) Establish a Communication - Electronic file cabinet and neighborhood newsletter

C. Expenditures – 2020

2020 Budget

INCOME: \$20,000

Storm Water Management	\$3,000
Taxes and maintenance of monument land	\$2,000
Monument improvement and lighting	\$8,000
Property Improvement Grants	\$3,000
Administrative expenses	\$1,000
Community building activities	\$2,000
Reserves/misc.	\$1,000
Total	\$20,000

D. Financing Method

The 2020 \$20,000 income was realized through NID #5 assessments (see Appendix B). The NID #5 Board after receiving input from our residents has prioritize expenditures and will continue to revise the budget as necessary to match the funds actually available.

E. Organization of NID #5 Board

The Board of Directors elected represent a cross section of our Heritage Heights NID residents which includes professionals currently employed and retirees who are dedicated to improving our community. Additionally, we are aggressively pursuing a permanent regular voice from our business partner(s). The board talent pool is very strong and diverse.

- **Chairperson:** D. Winston
- **Vice Chairperson:** C. Harris
- **Treasure:** T. Robertson
- **Secretary:** E. Roberson
- **Director:** L. Thompson
- **Director:** A. Chapman
- **Director:** R. Roberts
- **Advisory:** L. Hill
- **Advisory:** TBD (Business Representative)

NID #5 elected our current directors to the District Board ("board") consistent with terms of our subsection and the bylaws of the Heritage Heights NID #5. The board's primary responsibility will be implementation of this Operating Plan.

F. Relationship to the Granville Heritage Neighborhood Association (GHNA).

The NID #5 is a separate entity from the Granville Heritage Neighborhood Association, notwithstanding the fact that members, officers, and directors of each may be shared. The Association shall remain a private organization, not subject to the open meetings law, and not subject to the public record law except for its records generated in connection with the NID board. The Association may, and it is intended, shall, contract with the NID to provide services to the NID, in accordance with this Plan.

G. The NID #5 does not hold or own property.

IV. METHOD OF ASSESSMENT

A. Assessment Rate and Method

The Heritage Heights Neighborhood Improvement District #5 board of directors unanimously approved a \$100 uniform assessment method per taxable property included within the NID #5 boundaries for 2020.

The principle behind the assessment methodology is that each property should contribute to the NID in proportion to the benefit derived from the NID.

After consideration of other assessment methods, it was determined that assessed value of a property was the characteristic most directly related to the potential benefit provided by the NID. Therefore, a fixed assessment on the assessed value of the property was selected as the basic assessment methodology for this NID.

As of January 1, 2019, the property in NID #5 had a total assessed value of over \$72 million dollars.

Appendix B shows the assigned NID assessment for each property included in the district.

V. 2020 OPERATING PLAN

A. Phased Development

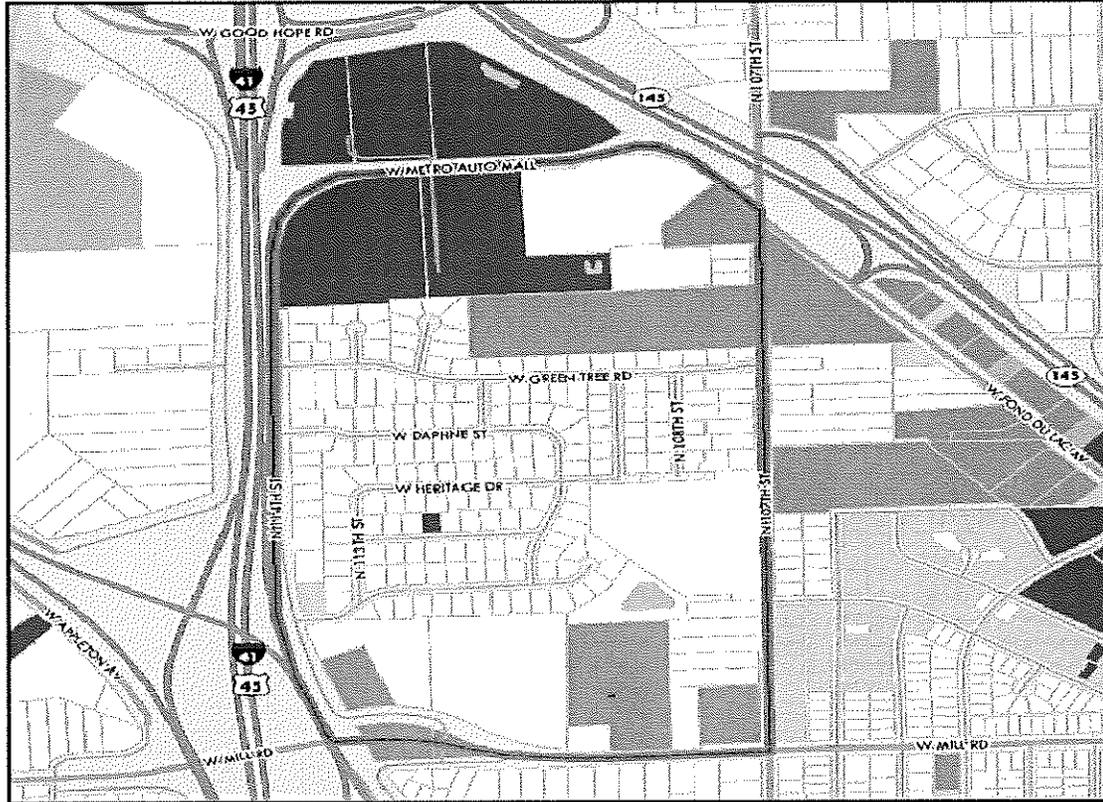
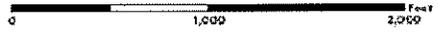
NID #5 will continue to revise and develop the Operating Plan annually, in response to changing development needs and opportunities in the district, in accordance with the purposes and objectives defined in this initial Operating Plan.

NID #5 Operating Plan will continue to apply the approved assessment formula, as adjusted, to raise funds to meet the next annual budget. However, the method of assessing will not be materially altered, except with the consent of the City of Milwaukee.

APPENDIX

HERITAGE HEIGHTS NEIGHBORHOOD PROPOSED NEIGHBORHOOD INVESTMENT DISTRICT

Prepared by the Dept. of City Development Planning Division, 4/28/2016
Source: City of Milwaukee Information Technology Management Division

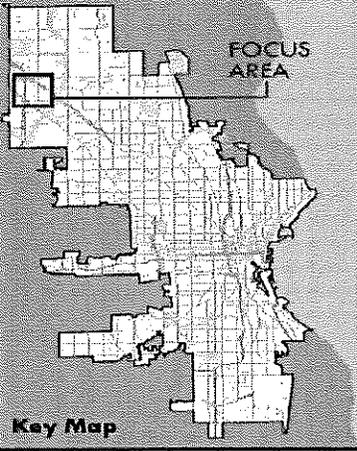


Legend

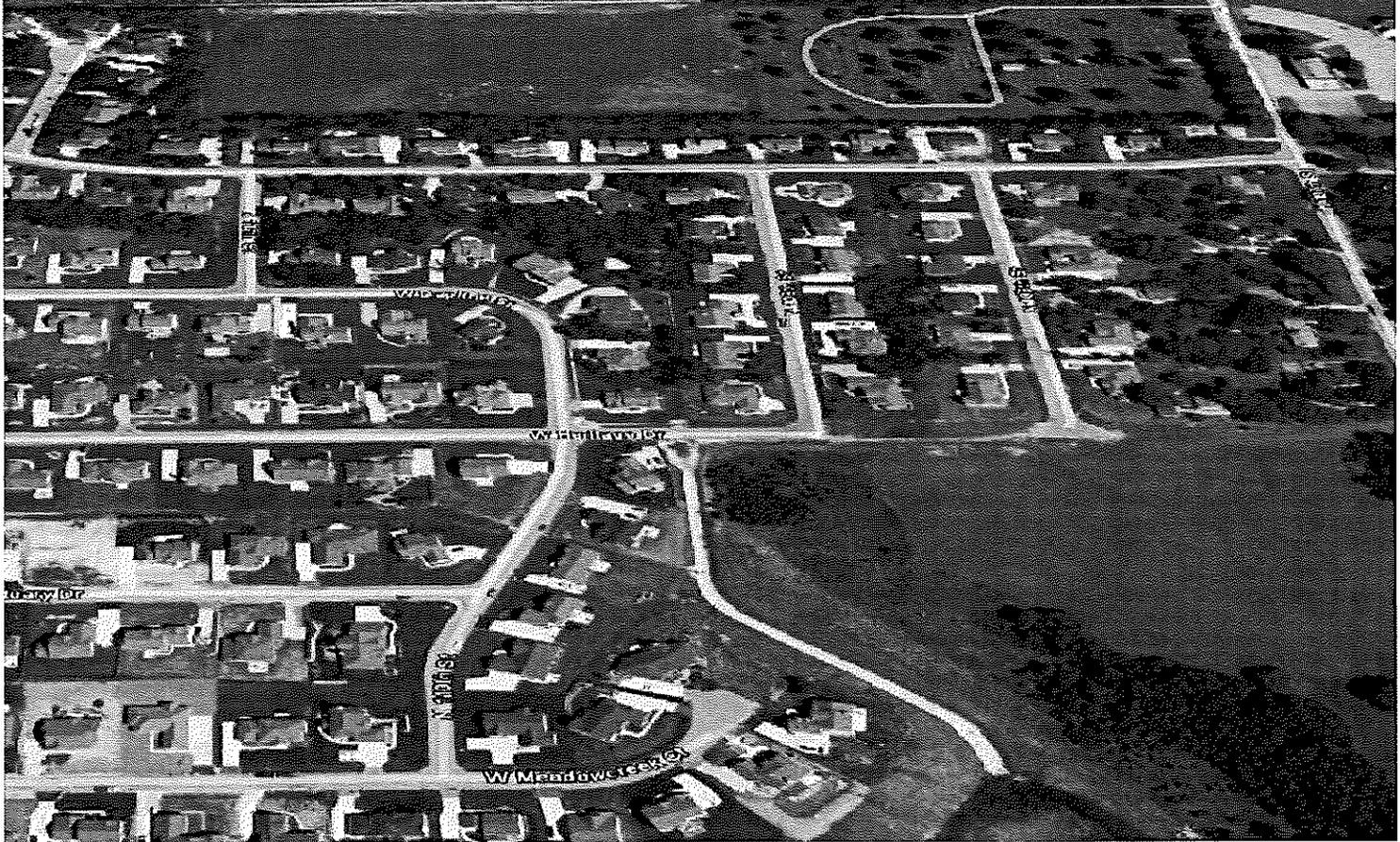
- Proposed NID Boundary
- Parcel Boundary

Land Use

- Single Family
- Duplex
- Multi-Family
- Condominiums
- Commercial
- Mixed-Use
- Public / Quasi-Public Buildings
- Public / Quasi-Public Open Space
- Vacant Land



Path: P:\GIS_Data\Projects\GIS Projects\16-04-25 Heritage Heights NID\Map - Proposed Heritage Heights NID.mxd

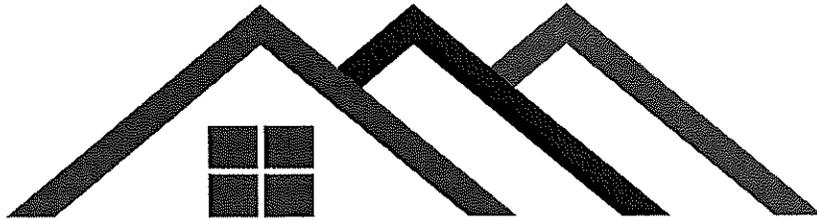


Property Assessment:

200 properties were assessed at \$100.00 annual tax revenue Total = \$20,000.

Exempt properties

- | | |
|-----------------------------------|---------------------------|
| 1. West Grandville Cemetery Assn | 6805 N. 107 Street |
| 2. West Grandville Church | 6925 N. 107 Street |
| 3. Northview United Church | 10710 W. Mill Rd. |
| 4. Salem Evangelical Lutheran | 11123 W. Green Tree |
| 5. Salem Evangelical Lutheran | 11034 W. Green Tree Ave |
| 6. City of Milwaukee | 10915-R W. Meadowcreek Dr |
| 7. New Restoration Church | 11248 West Mill Rd |
| 8. Heritage Heights SWM Pond | 10705 W. Green Tree |
| 9. St Mark AME Church | 6626 N. 114 Street |
| 10. Wisconsin Corp OF Seventh Day | 10900 W. Mill Rd |
| 11. City of Milwaukee School | 6577 N. 107 |



***Reinvent Where You Live Heritage Heights Your Destination
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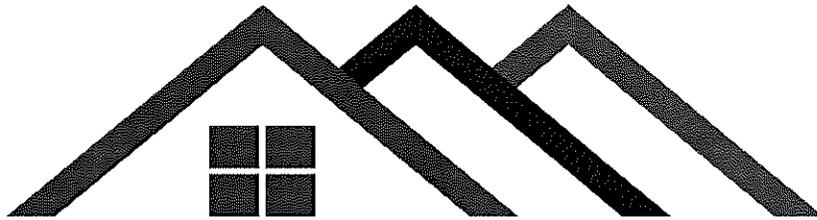
NID #5

ANNUAL REPORT (2020)

Mission Statement/Vision/Priorities

To promote and sustain Heritage Heights NID#5 as a thriving and diverse neighborhood. By influencing the design of new homes and the remodeling of older homes in a way that preserves, enhances, and is inviting for others to want to live in the subdivision and excites the area sense of place for thriving nearby businesses.

- To ensure that the City of Milwaukee's request for Water Efficiency Improvements including replacement of water laterals, old piping, low-flow fixtures, storm water maintenance including backyard swells, and other necessary repairs are completed.
- To enhance Lawn Appeal including our mailbox project, community lighting, and other lawn appeal projects.
- To ensure Code Compliance including all repairs necessary to remedy an existing code violation.
- To provide Safety Improvements including LED lighting, ditch repair, communication with the Milwaukee Police Department (District #4), neighborhood awareness, and other safety projects.
- Increase our Entrance Appeal including a new monument at the entrance and other aesthetic enhancements.
- Neighborhood Preservation.
 - Maintain deed restrictions and other visionary goals of the development.
 - Maintain structures and land in an aesthetically pleasing manor.
- Stabilization and Escalation of NID property values.
- Crime remediation and reduction.
 - Destination neighborhood vision.
 - Based on the concept of a "gated community w/o walls".
- Celebration and Preservation of neighborhood diversity.
- Development of policies and procedures that allow for effective enforcement of deed restrictions and neighborhood covenants.
- Outreach to owners of rental properties to ensure that they and their tenants are aware and abide by neighborhood and aesthetic covenants.



NID #5

Mission Statement/Vision/Priorities (continued)

- Facilitate and ensure familiarity and collaboration between neighbors.
- Effective maintenance and five-year certification of our Storm Water Management Plan.
- Implementation of a Watershed project collaboration with the Sweet Water organization
- Method of Communication - Electronic file cabinet

Financial Relationships w/ other entities (CDCs, non-profits, associations)

None Currently Identified

Total Assessed Value of Properties within Neighborhood

Median Home Value \$342,900 (Trulia Real Estate Market Overview 2018)

Core Programs

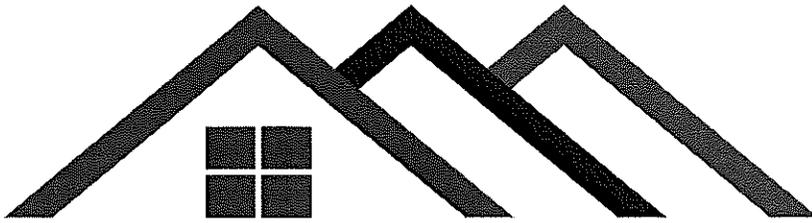
- Common Area Grass/foilage Maintenance
- Subdivision Storm Water Maintenance
- Monument Utility Cost and Maintenance
- Public/Community Initiatives
- Holiday/Community Events
- Mailbox Repair/Replacement Program
- Light-pole Repair/Replacement Program
- Security programs
- NID Administrative Cost
- Organization Bi-laws Regulation Enforcement

Economic Development

- NID Enhancement Projects
- Secure Water Management Grants

Marketing & Branding

- Recognition (Awards, newspaper/TV mentions)
- Grants
- NID Facebook Page & Website link with GHNA Neighborhood Association
- Neighbor to Neighbor Advocacy
- Community Electronic file cabinet
- Community Newsletter



NID #5

Core Events

- Neighborhood Block Party
- Neighborhood Clean-up
- Neighborhood Needs/Feedback Survey
- New Resident Meet & Great Social
- Neighborhood Events Calendar
- NID #5 Destination Neighborhood

Partner/Collaborative Initiatives

- Partnership; with neighbors, elected officials, businesses and other community focused organizations to maximize benefit and services based on tax valuations and payments.
- Encourage community service. (Working for and with neighbors to improve this neighborhood.
- Partnering with Churches, Schools and the Car Dealership to make our neighborhood a uniquely distinct community.
- Work closely with the Granville Heights Neighborhood Association (GHNA) to promote living, working and visiting the NID #5.

New Programs/New Committees Formed

- Advisory Lawyer Consortium
- Communication
- Resident Involvement
- Community Calendar
- Strategic Planning
- Neighborhood Stabilization/Property Escalation
- Partnership (Neighbors, Elected Officials, Businesses, etc.)
- Community Service/Participation
- Water Management Advisory
- Survey/Feedback



Heritage Heights NID #5

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NID #5 BOARD MEMBERSHIP

The Board of Directors elected represent a cross section of our Heritage Heights NID residents which includes professionals currently employed and retirees who are dedicated to improving our community. Additionally, we are aggressively pursuing a permanent regular voice from our business partner(s). The board talent pool is very strong and diverse.

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April 1, 2019

INDEPENDENT AUDITOR'S REPORT
AGREED UPON PROCEDURES

Board of Directors
Neighborhood Improvement District (NID) #5
Milwaukee, Wisconsin

Scope of Review

The Board of Directors for Heritage Subdivision engaged me to perform an Agreed Upon Procedures review regarding the \$19,800 received from the City of Milwaukee in March 2018. The scope of the Agreed Upon Procedures included transactions processed between August and December 2018, as transactions processed between March and July 2018 were audited in July 2018.

The City of Milwaukee has requested confirmation from the Heritage Board of Directors that all expenditures to-date were appropriate and related to the maintenance and upkeep of the Heritage Subdivision.

Agreed Upon Procedures

The Agreed Upon Procedures, which are noted below were completed on April 1, 2019

1. Confirm ending (July 2018) and starting (August 2018) check numbers.
2. Confirm ending (July 2018) and starting (August 2018) bank balances.
3. Confirm that checks outstanding on the July bank statement cleared the bank in August.
4. Review bank statements from US Bank for the months of Aug, Sept, Oct, Nov and Dec and confirm that all transactions have been accounted for within the G/L.
5. Review each check stub and supporting receipts, for alignment, reasonableness and agreement of invoice to amount paid.
6. Recompute the December 31, 2018 check account balance and tie to General Ledger

Results and Conclusion

The Agreed Upon Procedures were completed without material exceptions and all expenditures reviewed (\$9,324.03) were accounted for, with supporting receipts.

Sincerely,

Juanita
Banks

Digitally signed by
Juanita Banks
Date: 2019.04.04
14:43:44 -05'00'

Juanita Banks, Certified Public Accountant | Certified Internal Auditor | Certified Risk Manager

