

Business Improvement District No. XX
Lincoln Village Business Improvement District (LVBID)
Proposed Operating Plan

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1. Introduction

In 1984, the Wisconsin legislature created 66.1109 (formerly 66.608) of the Statutes enabling cities to establish Business Improvement Districts (BIDs). The purpose of the law is “to allow businesses within those districts to develop, to manage and promote the districts and to establish an assessment method to fund these activities.” (1983 Wisconsin Act 184, Section 1, legislative declaration.)

The City of Milwaukee has previously approved a petition from property owners which requested the creation of a Business Improvement District for the purposes of revitalizing and improving the Lincoln Village business district on Milwaukee’s south side. The BID law requires that every district have an annual Operating Plan. This document is the initial Operating Plan for the proposed Lincoln Village Business Improvement District. The BID proponents prepared this Plan with technical assistance from the City of Milwaukee Department of City Development.

2. District Boundaries

A listing of the properties included in the district is provided in Appendix A. The Lincoln Village Business Improvement District is roughly bounded by:

- The eastern boundary of the LVBID is the Kosciuszko Park side of the intersection of South 10th Street and West Lincoln Ave.
- The northern boundary of the LVBID is the businesses along the northern side of West Lincoln Ave. as well as the businesses along South 13th Street that are south of West Windlake Ave.
- The western boundary of the LVBID is the businesses east of the intersection of South 16th Street and West Lincoln Ave.
- The southern boundary of the LVBID is the businesses along the southern side of West Lincoln Ave. as well as some along South 13th Street which are functionally linked to the Lincoln Village business district.

3. Proposed Operating Plan

a. Plan Objectives

The objectives of the LVBID are to:

- i. Develop the vitality of the Lincoln Village business district;
- ii. Increase the number and variety of businesses within the LVBID;
- iii. Enhance the community image through safety and beautification initiatives;
- iv. Market the Lincoln Village area as the premier commercial corridor on Milwaukee’s south side;
- v. Promote the mutually beneficial opportunities among LVBID’s businesses;
- vi. Protect and preserve the historical significance and integrity of structures in the target area;
- vii. Ultimately grow commercial business and property values.

b. Proposed activities – Year One

Principle activities to be engaged in by the district during its first year of operation will include:

- i. Provide a matching grant for property owners to obtain a security system for their property not to exceed \$2000 or 40% of the total project cost;
- ii. Broaden the existing marketing and promotional programs, in conjunction with the Main Street Milwaukee program and VISIT Milwaukee to build a brand for the retail and dining amenities within the LVBID;
- iii. Further develop the websites of LVBID businesses and the LVBID as the primary communications and promotion tool among businesses in the LVBID area;
- iv. Organize and participate in neighborhood cleanup events;
- v. Actively participate with local task forces of government and businesses seeking to promote economic development activities on Milwaukee’s south side.

c. Proposed Expenditures – Year One

Category	Item	Expenditure	%
Admin	Security System Grant	\$8,500	47.2%
	Administration	\$7,500	41.7%
	Audit	\$2,000	11.1%
TOTAL		\$18,000	100%

d. Financing Method

It is estimated that \$18,000 will be raised through BID assessments. The BID board shall have the authority and responsibility to prioritize expenditures and to revise the budget as necessary to match the funds actually available.

e. Organization of the BID Board

The Mayor will appoint members to the LVBID Board (“board”). The board’s primary responsibility will be the implementation of this Operating Plan. This will require the board to negotiate with providers of services and materials to carry out the Plan, to enter into various contracts, to monitor development activity, to periodically revise the Operating Plan, to ensure district compliance with the provisions of applicable statutes and regulations, and to make reimbursements for any overpayments of BID assessments.

State law requires that the board be composed of at least five members and that a majority of board members be owners or occupants of property within the district.

It is recommended that the BID board be structured and operate as follows:

- i. Board Size – At least five members
 - ii. Composition – At least three members shall be owners or occupants of property within the district. Any non-owner or non-occupant appointed to the board shall be a resident of the City of Milwaukee. The board members shall elect its Chairperson from among its members.
 - iii. Term – Appointments to the board shall be for a period of two years.
 - iv. Compensation – None
 - v. Meetings – All meetings of the board shall be governed by the Wisconsin Open Meetings Law.
 - vi. Record Keeping – Files and records of the board’s affairs shall be kept pursuant to public record requirements.
 - vii. Staffing – The board may employ staff and/or contract for staffing services pursuant to this Plan and subsequent modifications thereof.
 - viii. Meetings – the board shall meet regularly, at least twice a year. The board shall adopt rules of order (“by laws”) to govern the conduct of its meetings.
- f. Relationship to the Lincoln Village Business Association (LVBA)

The LVBA shall be a separate entity from the LVBA, notwithstanding the fact that members, officers, and directors of each may be shared. The LVBA shall remain a publicly and privately funded non-profit organization, and subject to the open meeting law for its records generated in connection with the BID board. The LVBA may, and it is intended, shall, contract with the LVBA to provide services to the BID, in accordance with this Plan.

4. Method of Assessment

a. Assessment Rate and Method

The principle behind the assessment methodology is that each property should contribute to the BID in proportion to the benefit derived from the BID. After consideration of other assessment methods, it was determined that a flat fee on each property was the most equitable assessment method related to the potential benefit provided by the BID. Therefore, a fixed assessment of \$250 per year on the assessed value of the property was selected as the basic assessment methodology for this BID.

As of January 1, 2009, the property in the proposed district has a total assessed value of \$13,381,500. This plan proposed to assess the property in the district at a rate of \$250 per parcel will raise \$18,000 for the purposes of the BID.

Appendix A shows the projected BID assessment for each property included in the district.

b. Future Assessments

The Lincoln Village BID Board of Directors will engage in a performance review after every year of BID operation to determine appropriate assessment rate changes to meet the needs of the BID operator as well as property owners.

c. Excluded and Exempt Property

The BID law requires explicit consideration of certain classes of property. In compliance with the law the following statements are provided.

- i. State Statute 66.1109(1) (f) Im: The district will contain property used exclusively for mercantile, manufacturing and special mercantile purposes, as well as properties used in part for manufacturing. These properties will be assessed according to the method set forth in this plan because it is assumed that they will benefit from development in the district.
- ii. State Statute 66.1109(5) (a): Property known to be used exclusively for residential purposes will not be assessed; such properties will be identified as BID Exempt Properties in Appendix D, as revised each year.
- iii. In accordance with the interpretation of the City Attorney regarding State Statute 66.1109(1) (b), property exempt from general real estate taxes has been excluded from the district. Privately owned tax-exempt property adjoining the district and which is expected to benefit from district activities may be asked to make a financial contribution to the district on a voluntary basis.

5. Relationship to Milwaukee Comprehensive Plan and Orderly Development of the City

a. City Plans

In February 1978, the Common Council of the City of Milwaukee adopted a Preservation Policy as the policy basis for its Comprehensive Plan and as a guide for its planning, programming, and budgeting decisions. The Common Council reaffirmed and expanded the Preservation Policy in Resolution File Number 881978, adopted January 24, 1989.

The Preservation Policy emphasizes maintaining Milwaukee's present housing, jobs, neighborhoods, services, and tax base rather than passively accepting loss of jobs and population, or emphasizing massive new development. In its January 1989 reaffirmation of the policy, the Common Council gave new emphasis to forging new public and private partnerships as a means to accomplish preservation.

The district is a means of formalizing and funding the public-private partnership between the City and property owners in the Lincoln Village area and for furthering preservation and redevelopment in this portion of the City of Milwaukee. Therefore, it is fully consistent with the City's Comprehensive Plan and Preservation Policy.

b. City Role in District Operation

The City of Milwaukee has committed to helping private property owners in the district promote its development. To this end, the City expected to play a significant role in the creation of the Business Improvement District and in the implementation of the Operating Plan. In particular, the City will:

- i. Provide technical assistance to the proponents of the district through adoption of the Plan, and provide assistance as appropriate thereafter.
- ii. Monitor and, when appropriate, apply for outside funds that could be used in support of the district.
- iii. Collect assessments, maintain in a segregated account, and disburse the monies of the district.
- iv. Receive annual audits required per sec. 66.1109 (3) (c) of the BID law.
- v. Provide the board, through the Tax Commissioner's Office on or before June 30th of each Plan year, with the official City records and the assessed value of each tax key number with the district, as of January 1st of each Plan year, for purposes of calculating the BID assessments.
- vi. Encourage the State of Wisconsin, Milwaukee County and other units of government to support activities of the district.

6. Plan Approval Process

a. Public Review Process

The Wisconsin Business Improvement District law establishes a specific process for reviewing and approving proposed districts. Pursuant to the statutory requirements, the following process will be followed:

- i. The Milwaukee City Plan Commission will review the proposed district boundaries and proposed Operating Plan and will then set a date for a formal public hearing.
- ii. The City Plan Commission will send, by certified mail, a public hearing notice and a copy of the proposed Operating Plan to all owners of real property within the proposed district. In addition a Class 2 notice of the public hearing will be published in a local newspaper of general circulation.
- iii. The City Plan Commission will hold a public hearing, will approve or disapprove the Plan, and will report its action to the Common Council.
- iv. The Economic Development Committee of the Common Council will review the proposed BID Plan at a public meeting and will make a recommendation to the full Common Council.
- v. The Common Council will act on the proposed BID Plan.
- vi. If adopted by the Common Council, the proposed BID Plan is sent to the Mayor for his approval.
- vii. If approved by the Mayor, the BID is created and the Mayor will appoint members to the district board established to implement the Plan.

b. Petition Against Creation of the BID

The City may not create the Business Improvement District if, within 30 days of the City Plan Commission's hearing, a petition is filed with the City containing signatures of:

- i. Owners of property to be assessed under the proposed initial Operating Plan having valuation equal to more than 40% of the valuation of all property to be

- assessed under the proposed initial Operating Plan, using the method of valuation specified in the proposed initial Operating Plan; or
- ii. Owners of property to be assessed under the proposed initial Operating Plan having an assessed valuation equal to more than 40% of the assessed valuation of all property to be assessed under the proposed Operating Plan.

7. Future Year Operating Plans

a. Phased Development

It is anticipated that the BID 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.

In later years, the BID Operating Plan will continue to apply the assessment formula, as adjusted, to raise funds to meet the next annual budget. However, the method of assessing shall not be materially altered, except with the consent of the City of Milwaukee.

b. Amendment, Severability, and Expansion

The BID has been created under authority of Section 66.1109 of the Statutes of the State of Wisconsin. Should any court find any portion of this Statute invalid or unconstitutional its decision will not invalidate or terminate the BID and this BID Plan shall be amended to conform to the law without need of reestablishment.

Should the legislature amend the Statute to narrow or broaden the process of a BID so as to exclude or include as assessable properties a certain class or classes or properties, then this BID Plan may be amended by the Common Council of the City of Milwaukee as and when it conducts its annual Operating Plan approval and without necessity to undertake any other act. This is specifically authorizes under Section 66.1109(3) (b).

c. Performance Review

The Lincoln Village BID Board of Directors will engage in a performance review after its fifth operating year to determine continuation of the Business Improvement District. This performance review also recognizes that the Statutes of the State allow for a petition of dissolution on an annual basis.

Appendix A: List of Assessed Properties

HOUSE #	DIR	STREET	STTYPE	CURRENT ASSESSMENT	BID ASSESSMENT
1000	W	LINCOLN	AV	123000	250
1001	W	LINCOLN	AV	216000	250
1008	W	LINCOLN	AV	33100	250
1013	W	LINCOLN	AV	136000	250
1017	W	LINCOLN	AV	130000	250
1018	W	LINCOLN	AV	145000	250
1021	W	LINCOLN	AV	116000	250
1022	W	LINCOLN	AV	159000	250
1025	W	LINCOLN	AV	173000	250
1026	W	LINCOLN	AV	155000	250
1027	W	LINCOLN	AV	163000	250
1033	W	LINCOLN	AV	141000	250
1100	W	LINCOLN	AV	271000	250
2305	S	11TH	ST	163000	250
1105	W	LINCOLN	AV	92600	250
1108	W	LINCOLN	AV	76000	250
1111	W	LINCOLN	AV	168400	250
1112	W	LINCOLN	AV	106000	250
1116	W	LINCOLN	AV	84400	250
1117	W	LINCOLN	AV	181000	250
1120	W	LINCOLN	AV	60000	250
1125	W	LINCOLN	AV	58100	250
1126	W	LINCOLN	AV	99600	250
1128	W	LINCOLN	AV	104000	250
1129	W	LINCOLN	AV	107000	250
1131	W	LINCOLN	AV	120000	250
1132	W	LINCOLN	AV	92700	250
1136	W	LINCOLN	AV	129000	250
1200	W	LINCOLN	AV	581000	250
1201	W	LINCOLN	AV	201000	250
1207	W	LINCOLN	AV	60000	250
1210	W	LINCOLN	AV	115000	250
1211	W	LINCOLN	AV	125000	250
1221	W	LINCOLN	AV	1028000	250
2200	S	13TH	ST	522000	250

2222	S	13TH	ST	562000	250
2229	S	13TH	ST	9600	250
2239	S	13TH	ST	216700	250
2251	S	13TH	ST	101000	250
2261	S	13TH	ST	504000	250
2266	S	13TH	ST	903000	250
2325	S	13TH	ST	274000	250
1301	W	LINCOLN	AV	441000	250
1311	W	LINCOLN	AV	132000	250
1317	W	LINCOLN	AV	105000	250
1321	W	LINCOLN	AV	95700	250
1326	W	LINCOLN	AV	366000	250
1327	W	LINCOLN	AV	277000	250
1333	W	LINCOLN	AV	119000	250
1371	W	WINDLAKE	AV	62500	250
1430	W	WINDLAKE	AV	121000	250
1412	W	LINCOLN	AV	280300	250
1428	W	LINCOLN	AV	166000	250
1437	W	LINCOLN	AV	101000	250
1438	W	LINCOLN	AV	146000	250
1500	W	LINCOLN	AV	0	0
1501	W	LINCOLN	AV	0	0
1505	W	LINCOLN	AV	109000	250
1509	W	LINCOLN	AV	124000	250
1515	W	LINCOLN	AV	104400	250
1519	W	LINCOLN	AV	93600	250
1520	W	LINCOLN	AV	234300	250
1525	W	LINCOLN	AV	136000	250
1530	W	LINCOLN	AV	210000	250
1531	W	LINCOLN	AV	150000	250
1550	W	LINCOLN	AV	264800	250
1551	W	LINCOLN	AV	142000	250
1555	W	LINCOLN	AV	73600	250
1559	W	LINCOLN	AV	132000	250
1563	W	LINCOLN	AV	133000	250
1567	W	LINCOLN	AV	86800	250
1570	W	LINCOLN	AV	144000	250

1571	W	LINCOLN	AV	101000	250
1575	W	LINCOLN	AV	88300	250
TOTAL				13544500	18000