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# Washington Park Neighborhood Improvement District #3 2024 Operating Plan

## 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. An assessment methodology is developed to allow the assessable residential and commercial properties within the geographic area to contribute to programs aimed at neighborhood improvements and other activities as approved by the NID Board. The ACT was drafted similar to the business improvement district statute.

In 2012 the City of Milwaukee received a petition from property owners which requested creation of a Neighborhood Improvement District for the purpose of revitalizing and improving the Washington Park neighborhood area on Milwaukee's near west side. The Washington Park NID was created on 9/5/2012, Common Council Resolution #120603.

The NID law requires that every district have an annual Operating Plan to renew the Neighborhood Improvement District. This document is the updated 2021 Operating Plan for the Washington Park Neighborhood Improvement District. The NID proponents prepared this Plan with technical assistance from the City of Milwaukee Department of City Development.

### B. Physical Setting

The boundary for the Washington Park Neighborhood Improvement District ("WP NID") encompasses the areas designated as Washington Park and Walnut Hill, while also including small portions of the Metcalfe Park neighborhood. The east side of N. 47th Street, which frames U.S. 41, is the western boundary for the north portion of the WP NID, including the park; below the park the boundary of WP NID is the East side of 41<sup>st</sup> Street. The eastern boundary is defined by the 30<sup>th</sup> St. Industrial Corridor. The northern boundary is roughly Meinecke Avenue. The southern boundary is the 30<sup>th</sup> St. Corridor and Vliet Street. For a specific boundary, see Appendix A, Map.

In the last decades of the 19th century and first decade of the 20<sup>th</sup> century, the area that is now the WP NID was a newly subdivided section of the City of Milwaukee located at the northwestern periphery of the growing metropolis. Streets were laid out in the standard Milwaukee grid, creating blocks nearly 700 feet long from north to south and 300 wide. Plats maximized the number of lots on each block, with the majority being 30 feet wide along the street frontage and 120 feet deep. These narrow lots created a dense development pattern once they were filled with houses, but one that met buyers' desire for a detached dwelling. No rowhouses were built in the area, and practically no apartment buildings. The area was bordered on the north by the thriving business district of West North Avenue and included W. Lisbon Ave, including a Post Office, banks, theater, department store and multistory apartment buildings; all typical of 19<sup>th</sup> Century urban development. Single-family and duplexes then filled in the grid.

Now, the WP NID is home to several thriving businesses, organizations and families. The area is anchored by the 135 acre Washington Park and is home to the Harley Davidson Motor Corporation. The Urban Ecology Center provides programming at the Park, together with other neighborhood organizations. North Avenue Community Development Corporation, New Covenant Housing Corporation and United Methodist Children's Services have constructed several multi-million dollar catalytic affordable housing projects since 2000. The area is also home to the Washington Park Library, Bethune Academy, West Side Academy, the Progressive Community Health Center and many more amenities.

[Portions of this section taken from the Washington Park Comprehensive Plan 2006]

### C. Principal Office & Registered Agent

The Principal Office and Registered Office of the WP NID shall be 3940 W Lisbon Ave. Milwaukee, WI 53208. The Registered Agent of the WP NID shall be the chair elected for 2024.

## II. DISTRICT BOUNDARIES

Boundaries of the proposed district are shown on the map in Appendix A of this plan. A listing of the properties included in the district is provided in Appendix B. The description in Section I. B is a general description of the boundary, the actual boundary is depicted on Appendix A and the actual properties included are on Appendix B. In the event of a discrepancy, Appendix B shall control. The WP NID may update Appendix B during each annual Operating Plan. The Boundaries are herein referred to as "WP NID Area."

## III. PROPOSED OPERATING PLAN

### A. Plan Objectives

The objective of the WP NID is to (a) provide assistance to homeowners, (b) create jobs in the area, (c) fund community projects, and (d) create and implement a sustainable communities plan.

### B. Proposed Activities - 2024

Principle activities to be engaged in by the district during 2024 operation will include:

1. Assistance to Homeowners

a. Continue operation of a grant fund (“Grant Fund”) to provide assistance to homeowners of single family homes and duplexes in the WP NID Area to make modest grants (e.g. \$500 - \$7,500 each) to homeowners in the area to make the following improvements to their properties: energy efficiency improvements, repairs to increase water efficiency, repairs to the structural condition of the property (including roof repairs), safety improvements (including lighting, fencing and garages) and repairs to increase the curb appeal of property (“Improvements”). Grants are available to homeowners one time every five years. Additional criteria of the grants will continue to be modified by the NID Board to ensure accountability and utilization of the Grant Fund. The Board of Directors of the WP NID may at any time amend the amount of each grant, the number of grants, and any qualifying criteria.

2. Community and Economic Development

Become a convener of resources and opportunities to support local businesses and organizations located within the NID boundaries, and resident led initiatives. Foster collaboration with other community based organizations, businesses, funders, municipal leaders, elected officials and resident leaders.

3. Support local WP NID-based quality of life initiatives.

Provide support for planning and implementation of local quality of life initiatives will be funded, to the extent funds are available and plans are appropriate, by review and action of the WP NID Board of Directors. Collaborate and or contract with established community organizations and individuals with similar goals and missions of this operating plan and pursuant to the Grant Disbursement Policy.

WP NID reserves the right to respond to extenuating circumstances within the community (some examples could include but not limited to pandemics, natural disasters, civil unrest). The Board of Directors of the WP NID may at any time amend the amount of each grant, the number of grants, and any qualifying criteria.

4. Acquire or develop real estate to house an office and community gathering space within the WP NID Boundaries to establish a stronger WP NID presence.

- a. Establish a real estate committee to explore acquisition of real estate or a real estate development opportunity.
- b. Explore a partnership with a developer to determine feasibility of a real estate development project.

C. Proposed Expenditures - 2024

Proposed Budget attached as Appendix C. The WP NID Board shall have the authority and responsibility to prioritize expenditures and to revise the budget as necessary to match the funds actually available.

#### D. Financing Method

It is proposed to raise \$158,850. WP NID assessments (see Appendix B). Funds will also be pursued from foundations and other fundraising events. The WP NID may seek private financing for programming secured by this year's or future operating years of the WP NID.

#### E. Organization of NID Board

Upon creation of the WP NID, the District shall hold annual meetings to elect directors to the District Board (the "Board") consistent with terms of this subsection and the bylaws of the WP NID. The Board's primary responsibility will be 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 WP NID assessments.

State law requires that the board be composed of at least five directors and that a majority of the board directors be owners or occupants of property within the district. State law requires the local legislative body to set the time and place for a meeting at which directors of the board will be elected, and shall publish a class 2 notice under ch. 985 that contains the information. The notice shall specify that all individuals who either own or occupy real property within the neighborhood improvement district are eligible to serve on the board and vote at the election.

The WP NID Board shall be structured in accordance with the Bylaws, which is consistent with the following.

1. Board Size. Minimum of five (5) directors, and up to twelve (12) directors.
2. Composition.
  - a. 3/4 of Directors shall be residents that live in the WP NID Area or owners of residential property in the WP NID Area
  - b. 1/4 of Directors shall represent organizations or businesses that occupy commercial real property in the WP NID Area or owners of commercial property in the WP NID Area.
3. Term. All directors elected to the Board shall serve for a period of one year. Directors may be re-elected.
4. Compensation. Each director is eligible to receive a \$50 stipend for each quarterly meeting they attend and participate in. Stipend will not be given if a director is absent with or without an excused absence. Payment to be distributed within 5 business days of the attended meeting. Directors may choose to decline their stipend.
5. Meetings. All meetings of the Board's affairs shall be kept pursuant to public records requirements.
6. Staffing and Office. The Board may employ staff and/or contract for staffing services pursuant to this Operating Plan and subsequent modifications thereof. The Board may also maintain an office for the District, which shall be located within the District.
7. Meetings. The Board shall meet regularly, at least once every 3 months. The Annual meeting will take place the 2nd Monday of January. The Board shall adopt rules of order (by-laws) to govern the conduct of its meetings.

8. Method of Electing Directors to District Board. Elections for the new year Board of Directors will be elected each year of the District's existence. Prior to the meeting, the City shall publish a Class 2 notice that contains the time and place of the annual meeting. The notice shall specify that all individuals who either own or occupy real property within the District are eligible to serve on the Board and vote at the election.
9. Changes. Any change in the Board size, composition or election methodology must be approved by a 2/3 majority of the entire Board.

#### F. Relationship to other Organizations

The WP NID shall be a separate entity from any organizations it contracts with notwithstanding the fact that members, officers and directors of each may be shared. The contracted organizations shall remain a private organization, not subject to the open meeting law, and not subject to the public record law except for its records generated in connection with the WP NID Board. The contracted organizations may, and it is intended, shall, contract with the WP NID to provide services to the NID, in accordance with this Plan.

### IV. METHOD OF ASSESSMENT

#### A. Assessment Rate and Method

The principle behind the assessment methodology is that each property should contribute to the WP NID in proportion to the benefit derived from the WP NID. After consideration of other assessment methods, it was determined that for residential properties, the number of residential units was the

characteristic most directly related to the potential benefit provided by the WP NID. For commercial properties it was determined that a flat fixed fee was most appropriate. Therefore, a fixed assessment of \$50 per residential unit for residential properties was selected as the basic assessment methodology for residential properties in the WP NID ("Residential Methodology"); a fixed assessment of \$100 per commercial properties was selected as the basic assessment methodology for commercial properties in the WP NID ("Commercial Methodology"), and a fixed assessment of \$50 per vacant land residential or commercial properties (i.e. vacant lot with no structure) was selected as the basic assessment methodology for vacant land properties in the WP NID ("Vacant Land Methodology"). In the event a property contains both residential units and a commercial use, the Residential Methodology shall apply.

Maintaining an equitable relationship between the WP NID assessment and the expected benefits requires an adjustment to the basic assessment method. To prevent the disproportional assessment of a small number of high value properties, a maximum assessment of \$500 per parcel will be applied.

As of January 1, 2023, the properties in the proposed district had a total assessed value of approximately \$158,411,100.00 and approximately 1897 parcels. Appendix B shows the projected WP NID assessment for each property included in the district.

The assessment assigned to each parcel based on this formula is herein referred to as "WP NID Assessment." Any WP NID Assessments related to a previous year or years may not be contested. The

WP NID Assessment will be as shown on the attached list. Any WP NID Assessment related to this Operating

Plan may only be contested prior to approval and adoption of this Operating Plan by the City Council.

#### B. Excluded and Exempt Property

The NID Statute 66.1110 requires explicit consideration of certain classes of property. In compliance with the law, the following statements are provided.

1. In accordance with the interpretation of the City Attorney regarding Wis. Stats. Section

66.1110(7)(a), property exempt from general real estate taxes has been excluded from the District activities and will be asked to make a financial contribution to the District on a voluntary basis. Those tax exempt properties adjoining the District which are later determined no longer to be exempt from general property taxes shall automatically become included within the District and subject to assessment under any current operating plan without necessity to undertake any other act.

#### IV. 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 Washington Park neighborhood 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

Neighborhood Improvement District and in the implementation of the Operating Plan. In particular, the City will:

1. Provide technical assistance to the proponents of the district through adoption of the Plan, and provide assistance as appropriate thereafter.
2. Monitor and, when appropriate, apply for outside funds that could be used in support of the

- district.
3. Collect assessments, maintain in a segregated account, and disburse the monies of the district.
  4. Receive annual audits as required per sec. 66.1110 (4)(c) of the NID law.
  5. 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 NID assessments.
  6. Encourage the State of Wisconsin, Milwaukee County and other units of government to support the activities of the district.

## VI. PLAN APPROVAL PROCESS

### A. Public Review Process

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

1. 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.
2. In the initial year, 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.
3. The City Plan Commission will hold a public hearing, will approve or disapprove the Plan, and will report its action to the Common Council.
4. The Economic Development Committee of the Common Council will review the proposed NID Plan at a public meeting and will make a recommendation to the full Common Council.
5. The Common Council will act on the proposed NID Plan.
6. If adopted by the Common Council, the proposed NID Plan is sent to the Mayor for his approval.
7. If approved by the Mayor, the NID is created and the district board will be elected pursuant to section 3.E above.

### B. Petition against Creation of the NID

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

Owners of property to be assessed under the proposed initial Operating Plan having a valuation equal to more than 50% 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

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.



## VII. FUTURE YEAR OPERATING PLANS

### A. Phased Development

It is anticipated that the WP NID 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.

Section 66.1110 (6)(b) of the NID law requires the board and the City to annually review and make changes as appropriate in the Operating Plan. Therefore, while this document outlines in general terms the complete development program, it focuses upon Year One activities, and information on specific assessed values, budget amounts and assessment amounts are based on Year One conditions.

Greater detail about subsequent year's activities will be provided in the required annual Plan updates, and approval by the Common Council of such Plan updates shall be conclusive evidence of compliance with this Plan and the NID law.

In later years, the WP NID 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

This WP NID has been created under authority of Section 66.1110 of the Statutes of the State of Wisconsin ("NID Statute"). Should any court find any portion of this Statute invalid or unconstitutional its decision will not invalidate or terminate the WP NID and this WP NID Operating Plan shall be amended to conform to the law without need of re-establishment.

Should the legislature amend the Statute to narrow or broaden the process of a NID so as to exclude or include as assessable properties a certain class or classes of properties, then this NID 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.

## VII. Contraction with WP NID

Any contracting with the WP NID shall be exempt from the requirements of Sec 62.15, Wis. Stats. Because such contracts shall not be for the construction of improvements or provision of materials. If the WP NID does contract for the construction of improvements or provisions of material, it shall follow the requirements of such statutes to the extent applicable. Further, the annual accounting required under Sec 66.608 (3) (c) Wis. Stats., shall be deemed to fulfill the requirements of Sec 62.15 (14) Wis. Stats. The WP NID Board of

Directors and the City of Milwaukee shall comply with the provisions of Sec. 66.60 before the City inserts assessments for this NID plan onto the tax bills for the parcels assessed thereunder, only to the extent required by law, to create a lien on the parcels assessed. The WP NID may provide grant support to organizations that include the cost of staff, however, the WP NID shall not have employees directly and shall contract with a responsible party for any administration of grant funds.

### Appendices

Appendix A – Map

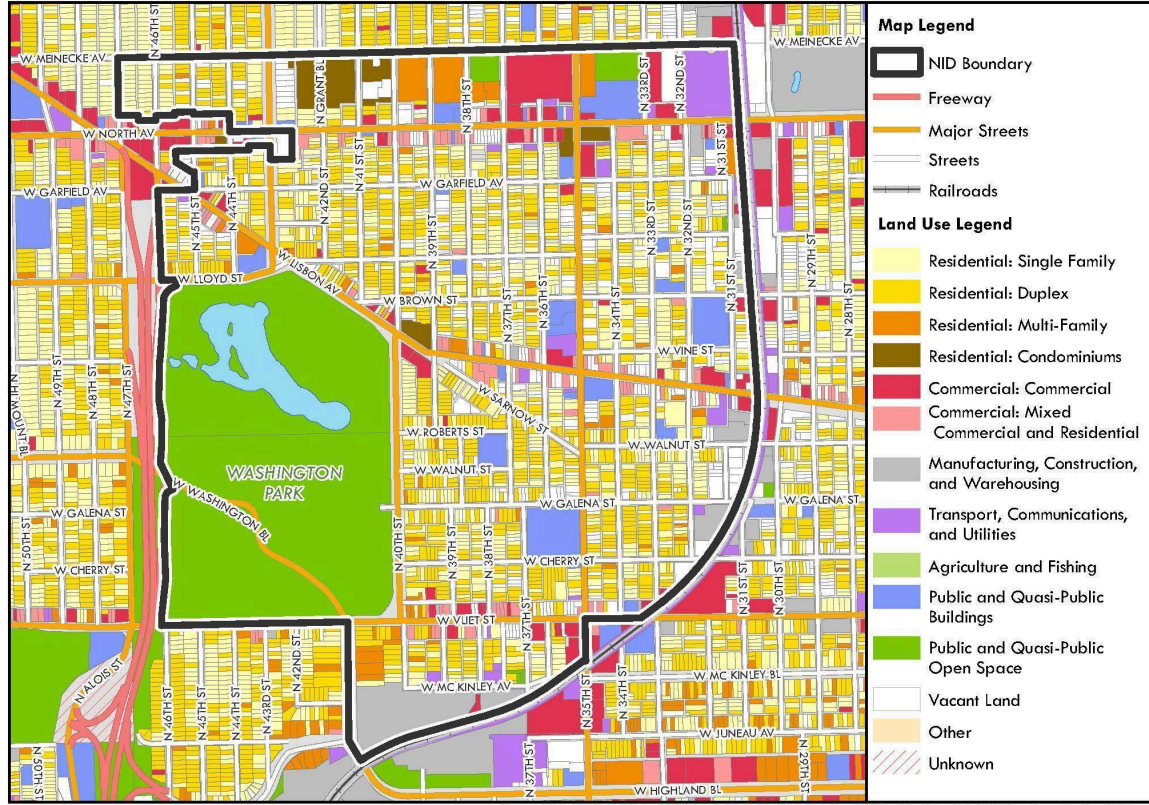
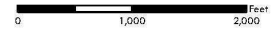
Appendix B – List of Properties / Assessments

Appendix C – 2024 Budget

Appendix A – Map

**NID NO. 3: WASHINGTON PARK**  
NEIGHBORHOOD IMPROVEMENT DISTRICT

Prepared by the Department of City Development Planning Division, 12/13/2016  
Source: City of Milwaukee Information Technology Management Division; NIDC



Document Path: E:\GIS\_Data\Projects\2016 Projects\16-11-14 NID Land Use Maps (x3)\Map - Washington Park NID & Current Land Use (Rev 12-13).mxd

Appendix B List of Properties/Assessments

Appendix C – 2024 Budget

| WP NID #3                                      | 2023                | Revised<br>3/9/2023 | 2024                |
|--|---------------------|---------------------|---------------------|
| <b>REVENUE</b>                                 |                     |                     |                     |
| NID Assessment/Residential/ Commercial         | \$156,000.00        | \$158,250.00        | \$158,850.00        |
| *Approximate 2023 Rollover                     | \$50,000.00         | \$36,799.43         | \$55,000.00         |
| <b>Total</b>                                   | <b>\$206,000.00</b> | <b>\$195,049.43</b> | <b>\$213,850.00</b> |
| <b>EXPENSES</b>                                |                     |                     |                     |
| NID Management Contract                        | \$30,000.00         | \$12,800.00         | \$12,800.00         |
| Housing Improvement Project Grant (Programing) | \$16,000.00         | \$15,000.00         | \$15,000.00         |
| Housing Improvement Project (HIP) Grants       | \$60,000.00         | \$60,000.00         | \$60,000.00         |
| Quality of Life Initiatives Grants             | \$20,000.00         |                     |                     |
| UMCS   |                     | \$5,000.00          | \$5,000.00          |
| W.O.R.C.                                       |                     | \$10,000.00         | \$10,000.00         |
| FMP  |                     | \$8,500.00          | \$8,500.00          |
| EUC  |                     | \$2,100.00          | \$2,100.00          |
| Environmental Maintenance Jobs/Contract        | \$45,168.00         | \$34,080.00         | \$34,080.00         |
| <b>Total Grants Expenses</b>                   |                     | <b>\$145,380.00</b> | <b>\$147,480.00</b> |
| Administrative Supplies Costs                  | \$2,450.00          | \$2,086.00          | \$1,722.00          |
| Website hosting Renews every July              | \$2,400.00          | \$324.00            | \$324.00            |
| Website Domain Renews every September          |                     | \$40.00             | \$40.00             |
| Professional Audit NID Account                 | \$2,000.00          | \$2,500.00          | \$2,500.00          |
| Financial Administration NID Account           | \$9,000.00          | \$10,000.00         | \$10,000.00         |
| Insurance NID Board                            | \$1,000.00          | \$1,000.00          | \$1,000.00          |
| Marketing/Postage NID Elections                | \$2,800.00          | \$2,800.00          | \$2,800.00          |
| <b>Total Administrative Costs</b>              |                     | <b>\$18,750.00</b>  | <b>\$18,386.00</b>  |
| <b>Total All Expenses</b>                      | <b>\$190,818.00</b> | <b>\$164,130.00</b> | <b>\$165,866.00</b> |