

CITY OF WAUPUN



2019 Business Improvement District Operational Plan

Final

4/9/2019

THE WAUPUN BUSINESS IMPROVEMENT DISTRICT
2019 OPERATING PLAN

I. INTRODUCTION

In 1984, the Wisconsin legislature created Sec. 66.1109 of the Statutes enabling cities to establish Business Improvement Districts (BID) upon the petition of at least one property owner within the proposed district. The purpose of the law is “to allow businesses within those proposed district to develop, manage, and promote the districts and to establish an assessment method to fund these activities”. Upon petition from property owners within the Waupun Business Improvement District (hereafter “BID”), the City’s Common Council created the BID and adopted its initial operating plan in 1988.

Section 66.1109(3)(b), Wis. Stats., requires that a BID Board “shall annually consider and make changes to the operating plan. The board shall then submit the operating plan to the local legislative body for approval”. The Board of the Waupun BID submits this BID operating plan in fulfillment of the statutory requirement.

This plan proposes a continuation and expansion of the activities described in the initial 1988 BID operating plan. Therefore, it incorporates by reference the earlier plans as adopted by the City’s Common Council. In the interest of brevity, this plan emphasizes the elements, which are required by Sec. 66.1109, Wis. Stats. and the proposed changes for 2020. This plan does not repeat the background information that is contained in the initial operating plan.

II. DISTRICT BOUNDARIES

A listing of the properties in the district and original map from the 1988 BID operating plan is provided in Appendix A and B.

III. 2019 OPERATING PLAN

A. Plan Objectives

The objectives of the BID are as follows:

- Market the Waupun business district through coordinated promotional and advertising programs.
- Upgrade the physical appearance of downtown to create an attractive setting.
- Develop informational and educational programs to show the public of the advantages of doing business in the downtown area.

- Coordinate programs for educational, technical, and training assistance for downtown businesses to improve their strategies and to promote a positive image in the community.
- Develop and implement a business recruitment plan for downtown Waupun.

B. Proposed Activities & Expenditures (see detail in attached budget, Appendix C)

The BID Board will have the authority and responsibility to prioritize expenditures and to revise the district budget as necessary to match the funds actually available. Any funds unspent at the end of 2019 shall be carried over to 2020 and applied against future expenses.

IV. PROMOTION OF ORDERLY DEVELOPMENT OF THE CITY

Under §66.1109(1)(f)(4), the Operating Plan must specify how the BID promotes the orderly development of the municipality, including its relationship to any municipal master plan.

The Waupun Business Improvement District is created through private sector initiative to further city goals. The creation of the BID is consistent with the City's plans and promotes the orderly development of the City in general and the business district in particular. This proposal is consistent with the City's Comprehensive Plan and all other City Ordinances and Plans.

V. METHOD OF ASSESSMENT

A. Assessment Rate and Method

As of December 31, 2018, the properties in the district had a total BID assessable value of \$17,215.50. This plan proposes to assess the taxable property in the district at a rate of \$1.50 per \$1,000 of assessed value for the purposes of the BID. Appendix A shows the projected BID assessment for each property included in the district.

The principle behind the assessment methodology is that each property owner should contribute to the BID in proportion to the benefit derived from the BID. After consideration of the assessment methods, it was determined that the assessed value of a property was the characteristic most directly related to the potential benefit provided by the BID. Therefore, a uniform rate applied on the assessed value of each property was selected as the basic assessment method for the Waupun BID

Information on specific assessed values, budget amounts, and assessment amounts are based on 2018 conditions. Greater detail about subsequent years' activities will

be provided in the required annual plan updates. Approval by the City Common Council of such operating plan updates shall be conclusive evidence of compliance with this operating plan and the BID law.

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. The method of assessing shall not be materially altered, except with the consent of the City of Waupun.

B. Excluded and Exempt Property

Wisconsin law specifies certain properties which are exempt from the assessment, and allows for the municipality to determine whether or not businesses operating specifically for manufacturing purposes are exempt.

- Wisconsin Statutes § 66.1109(1)(f) 1m: This section details what must be included in a Standard Operating Plan. “Whether real property used exclusively for manufacturing purposes will be specially assessed.” Property used exclusively for manufacturing purposes will not be assessed.
- Wisconsin Statutes §66.1109(5)(a): “Property used exclusively for residential purposes will not be assessed.”
- Wisconsin Statutes § 66.1109(5)(a): “Real property that is exempted from general property taxes under §70.11 will not be assessed.” Owners of property that is exempt from the special assessment may not receive the direct financial benefits of the Business Improvement District, such as in the case of a façade improvement grant or any other grant.

Owners of property that is exempt from the special assessment may not receive the direct financial benefits of the BID, such as in the case of the Façade Improvement Program.

VI. CITY ROLE IN DISTRICT OPERATION

The City of Waupun is committed to helping private property owners in the district promote its development. To this end, the City has played a significant role in the creation of the BID and in the implementation of its operating plan. In particular, the City will continue to:

- Provide funding to the BID for administration and promotion of a Façade Improvement Grant program, business and development recruitment, and other initiatives. This is on an annual basis and is reviewed each budget year.
- Monitor and, when appropriate, apply for outside funds, which could be used in support of the district.
- Collect and disperse BID assessments to the district.
- Receive annual audits, as required per Sec. 66.1109(3)(c) of the BID law.

- Encourage partners to support the activities of the district.

VII. BOARD MEMBERS AND STAFF

A. Board Members

The Mayor shall appoint the members of the BID Board subject to confirmation by the Common Council. Upon confirmation, board members serve a 3-year term expiring April 30th.

The Board is comprised of six (6) representatives from the BID District and four (4) representatives at-large. The current BID Board and staff are comprised as follows:

Board Members

Type of Member	Name	Current Term Expires
BID Representative	Krista Bishop	April 30, 2020
BID Representative	Wayne Buteyn (Chair)	April 30, 2019
At-Large Representative	Jack Dunham	April 30, 2021
BID Representative	Jan Harmsen	April 30, 2021
BID Representative	John Karsten	April 30, 2020
BID Representative	Rich Matravers	April 30, 2019
BID Representative	Jeff Riel	April 30, 2020
At-Large Representative	Teresa Ruch	April 30, 2021
At-Large Representative	John Theune	April 30, 2019
At-Large Representative	Al Verhage	April 30, 2020

Staff/Other

Julie Nickel, *Mayor – Ex-Officio Member*
 Kathy Schlieve, *City Administrator/Director of Economic Development*
 Sarah Van Buren, *Economic Development Coordinator*
 Ellie Tenpas, *Waupun Area Chamber of Commerce Executive Director*

Responsibilities of the Board include implementation of this operating plan and preparing annual reports of the District. The Board will also annually consider and make changes to the operating plan and submit the operating plan to the Common Council for approval. The Board will conduct its business consistent with the open meeting law and keep minutes as a matter of public record.

VIII. FUTURE YEARS’ OPERATING PLANS

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 purpose and goals in this operating plan.

Section 66.1109 (3)(a) of the BID law requires the BID 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 project, it focuses upon 2019 activities. Information on specific assessed values, budget amounts, and assessment amounts are based on 2018 conditions. Greater detail about subsequent years' activities will be provided in the required annual plan updates. Approval by the City Common Council of such operating plan updates shall be conclusive evidence of compliance with this operating plan and the BID law.

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. The method of assessing shall not be materially altered, except with the consent of the City of Waupun.

IX. AMENDMENT, SEVERABILITY, AND EXPANSION

The BID has been created under the 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 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 BID so as to exclude or include as assessable properties of a certain class or classes of properties, then this BID operating plan may be amended by the City of Waupun Common Council as and when it conducts its annual review and approval of the operating plan and without necessity to undertake any other act. This is specifically authorized under Sec. 66.1109(3)(b), Wis. Stats.

Appendix A – 2019 Assessed Values and BID Assessments

Appendix B – 1988 Original BID District Map

Appendix C – 2019 Operating Budget

Appendix A – 2019 Assessed Values and BID Assessments

BID Assessments 2018 Tax Roll (2019 Budget)

Dodge County			\$1,508,100					
Parcel	Owner	Address	2017 Assessed Value	2017 BID Assessment	2018 Assessed Value	Inc over prior yr - Assessed Value	2018 BID Assessment	Inc over prior yr - BID Assessment
292-1315-0511-006	FVS	101 S Madison St	903,700.00	1,490.55	884,500.00	(109,200.00)	1,326.75	(163.80)
292-1315-0511-020	L & G Properties	401 E Main St	119,800.00	179.40	105,000.00	(14,800.00)	157.50	(21.90)
292-1315-0511-021	TB Jark, LLC	405 E Main St	134,800.00	201.90	123,000.00	(11,800.00)	184.50	(17.40)
292-1315-0511-022	The Treasurer Box LLC	407 E Main St	54,000.00	81.00	57,000.00	3,000.00	85.50	4.50
292-1315-0511-023	The Treasurer Box LLC	409 E Main St	43,400.00	65.10	42,500.00	(900.00)	63.75	(1.35)
292-1315-0511-024	C of Waupun	411 E Main St	-	-	-	-	-	-
292-1315-0511-025	C of Waupun	415 E Main St	-	-	-	-	-	-
292-1315-0511-028	Joyce Dommise	417 E Main St	81,300.00	91.95	82,000.00	20,700.00	123.00	31.05
292-1315-0511-027	Waupun Community Develo	421 E Main St	-	-	-	-	-	-
292-1315-0511-028	Jeff Riel	425 E Main St	34,700.00	52.05	61,500.00	26,800.00	92.25	40.20
292-1315-0511-029	Jeff Riel	427 E Main St	28,700.00	43.05	64,000.00	35,300.00	96.00	52.95
292-1315-0511-030	DJ Eggers Holdings, LLC	429 E Main St	133,200.00	199.80	133,000.00	(200.00)	199.50	(0.30)
292-1315-0511-031	Jeff Riel	431 E Main St	40,100.00	60.15	73,500.00	33,400.00	110.25	50.10
292-1315-0511-032	Theresa Holdings	433 E Main St	70,900.00	106.35	70,000.00	(900.00)	105.00	(1.35)
292-1315-0511-034	Steve Aewe	435 E Main St	74,500.00	111.75	97,000.00	22,500.00	145.50	33.75
292-1315-0511-044	Sherman & Amber Lackey	23 S Madison St	35,800.00	53.40	59,000.00	23,400.00	88.50	35.10
292-1315-0511-045	James & Karl Pattee	19 S Madison St	99,500.00	149.25	100,500.00	1,000.00	150.75	1.50
292-1315-0511-048	Peter Lawrie	501 E Main St	305,400.00	458.10	300,500.00	(4,900.00)	450.75	(7.35)
292-1315-0512-019	Bertz Real Estate, Inc.	25 E Main St	81,600.00	122.40	104,500.00	22,900.00	158.75	34.35
292-1315-0512-021	Westra/Tilma	121 E Main St	48,800.00	72.90	54,500.00	5,900.00	81.75	8.85
292-1315-0512-022	CPA Rental Properties	111 E Main St	152,700.00	229.05	182,000.00	29,300.00	273.00	43.95
292-1315-0512-023	Paul Satowdel	105 E Main St	98,000.00	144.00	105,500.00	9,500.00	158.25	14.25
292-1315-0512-028	Janet Harman	223 E Main St	90,400.00	135.60	80,000.00	(1,400.00)	133.50	(2.10)
292-1315-0512-029	Trail's End	215 E Main St	198,500.00	294.75	284,000.00	7,500.00	396.00	11.25
292-1315-0512-030	Trail's End	16 S Mill St	165,000.00	247.50	172,000.00	7,000.00	258.00	10.50
292-1315-0512-039	Doug/Betty Wastland	321 E Main St	128,600.00	192.90	131,000.00	2,400.00	196.50	3.60
292-1315-0512-040	Doug/Betty Wastland	319 E Main St	45,300.00	67.95	57,000.00	11,700.00	85.50	17.55
292-1315-0512-041	Forsell Gappe	317 E Main St	60,000.00	90.00	85,000.00	5,000.00	97.50	7.50
292-1315-0512-042	Daniel Link	315 E Main St	83,100.00	124.65	82,500.00	(800.00)	123.75	(0.90)
292-1315-0512-043	Jack Qualmann	313 E Main St	86,500.00	129.75	84,000.00	(2,500.00)	126.00	(3.75)
292-1315-0512-044	Melanie Williams	309 E Main St	106,100.00	159.15	109,000.00	2,900.00	163.50	4.35
292-1315-0512-045	Robt Bishop	307 E Main St	80,100.00	90.15	70,000.00	(9,000.00)	105.00	14.85
292-1315-0512-048	Gybens Jewelry Inc	305 E Main St	54,400.00	81.60	70,000.00	15,600.00	105.00	23.40
292-1315-0512-053	No. 48 F & M	16 S Madison St	58,900.00	88.35	102,500.00	43,600.00	153.75	65.40
292-1315-0521-001	Soodama Properties LLC	1 Main St	212,300.00	318.45	235,500.00	23,200.00	353.25	34.80
292-1315-0521-002	Soodama Properties LLC	9 W Main St	28,800.00	43.20	28,000.00	(800.00)	42.00	(1.20)
292-1315-0521-035	Pramukh, LLC	27 S State St	281,800.00	422.70	249,000.00	(32,800.00)	373.50	(49.20)
TOTAL DODGE COUNTY ASSESSMENT			4,265,900.00	6,398.85	4,448,000.00	182,100.00	6,672.00	273.15

Fond du Lac County

Parcel	Owner	Address	2017 Assessed Value	2017 BID Assessment	2018 Assessed Value	Inc over prior yr - Assessed Value	2018 BID Assessment	Inc over prior yr - BID Assessment
WPN-14-15-99-EA-010-00	Wells Fargo	37 N Madison St	844,800.00	967.20	594,500.00	(50,300.00)	891.75	(75.45)
WPN-14-15-99-EA-025-00	Vosekall Properties	17 N Madison St	81,400.00	122.10	85,000.00	3,600.00	127.50	5.40
WPN-14-15-99-EA-028-00	Richard Fletcher	11 N Madison St	24,300.00	36.45	24,000.00	(300.00)	36.00	(0.45)
WPN-14-15-99-EA-027-00	Georal Almi	400 E Main St	91,500.00	137.25	114,000.00	22,500.00	171.00	33.75
WPN-14-15-99-EA-026-00	Loft & Randall Dylstra	454 E Main St	71,500.00	107.25	75,500.00	4,000.00	113.25	6.00
WPN-14-15-99-EA-030-00	VK Management	406 E Main St	97,100.00	145.65	97,000.00	(100.00)	145.50	(0.15)
WPN-14-15-99-EA-032-00	VK Management	408 E Main St	97,000.00	145.50	97,000.00	-	145.50	-
WPN-14-15-99-EA-034-00	MSH LLC	412 E Main St	21,000.00	31.50	21,000.00	-	31.50	-
WPN-14-15-99-EA-035-00	MSH LLC	418 E Main St	465,500.00	698.25	436,500.00	(29,000.00)	654.75	(43.50)
WPN-14-15-99-EA-045-00	Cassandra Ver Hage	428 E Main St	70,200.00	105.30	88,000.00	17,800.00	132.00	26.70
WPN-14-15-99-EA-048-00	Paul Satowdel	428 E Main St	78,000.00	117.00	77,500.00	(500.00)	116.25	(0.75)
WPN-14-15-99-EA-050-00	Pamela Fuller	434 E Main St	81,000.00	121.50	78,500.00	(2,500.00)	117.75	(3.75)
WPN-14-15-99-EA-055-00	Scott Peters	42 Fond Du Lac St	25,100.00	37.65	62,000.00	36,900.00	93.00	55.35
WPN-14-15-99-EA-065-00	BrickMortar, Inc.	162,500.00	288.75	179,000.00	(13,500.00)	288.50	(0.25)	
WPN-14-15-99-EA-080-00	Pamela Fuller	10 Fond Du Lac St	91,200.00	136.80	107,000.00	15,800.00	160.50	23.70
WPN-14-15-99-EA-085-00	John Karsten	4 Fond Du Lac St	28,300.00	42.45	35,000.00	6,700.00	52.50	10.05
WPN-14-15-99-EA-093-00	Karen & Martin Koehler	22 N Madison St	52,500.00	78.75	50,000.00	(2,500.00)	75.00	(3.75)
WPN-14-15-99-EA-094-00	Total Business Prod	18 N Madison St	127,700.00	191.55	120,000.00	(7,700.00)	180.00	(11.55)
WPN-14-15-99-EA-099-00	James & Karl Pattee	18 A N Madison St	25,300.00	37.95	28,500.00	3,200.00	42.75	4.80
WPN-14-15-99-EA-114-00	Sheng J. Chen	300 E Main St	110,700.00	166.05	150,000.00	39,300.00	225.00	58.95
WPN-14-15-99-EA-116-00	ABB & J Investment	306 E Main St	170,500.00	255.75	191,000.00	11,500.00	286.50	17.75
WPN-14-15-99-EA-120-00	Abb & J Investments LLC	310 E Main St	48,100.00	69.15	88,000.00	21,900.00	102.00	32.85
WPN-14-15-99-EA-122-00	Carl Otto	312 E Main St	53,200.00	79.80	38,500.00	(14,700.00)	57.75	(22.05)
WPN-14-15-99-EA-128-00	Jeffrey Riel	314 E Main St	71,600.00	107.40	93,500.00	21,900.00	140.25	32.85
WPN-14-15-99-EA-130-00	Douglas Duer	316 E Main St	78,200.00	117.30	84,000.00	5,800.00	126.00	8.70
WPN-14-15-99-EA-134-00	Osak Properties LLC	318 E Main St	61,400.00	92.10	74,000.00	12,600.00	111.00	18.90
WPN-14-15-99-EA-136-00	Brian Kiber	320 E Main St	61,300.00	91.95	63,000.00	1,700.00	94.50	2.55
WPN-14-15-99-EA-138-00	Trail's End Properties, LLC	324 E Main St	117,800.00	176.40	118,000.00	400.00	177.00	0.60
WPN-14-15-99-EA-140-00	M. Vande Caede	16 N Madison St	59,900.00	89.85	80,000.00	100.00	90.00	0.15
WPN-14-15-99-EA-156-00	National Bank	210 E Main St	1,129,100.00	1,693.65	1,112,000.00	(17,100.00)	1,668.00	(25.65)
WPN-14-15-99-MC-035-00	William Geriba	534 E Main St	297,700.00	446.55	282,500.00	(15,200.00)	423.75	(22.80)
WPN-14-15-99-MP-005-00	Michael Mueller	510 E Main St	54,400.00	81.60	85,500.00	11,100.00	98.25	16.65
WPN-14-15-99-MP-010-00	Gordon Schultz	13 Fond Du Lac St	174,000.00	261.00	120,500.00	(53,500.00)	180.75	(80.25)
WPN-14-15-99-MP-015-00	Action Advertising, Inc.	17 Fond Du Lac St	78,500.00	117.75	72,000.00	(4,500.00)	108.00	(9.75)
WPN-14-15-99-MP-020-00	Gordon Schultz	Fond Du Lac St	8,500.00	12.75	9,500.00	1,000.00	14.25	1.50
WPN-14-15-99-MP-025-00	Accel Automotive	99 Fond Du Lac St	112,100.00	168.15	115,000.00	2,900.00	172.50	4.35
WPN-14-15-99-MP-030-00	Snow Properties	514 E Main St	158,200.00	237.30	160,000.00	3,800.00	240.00	5.70
WPN-14-15-99-MP-035-00	Peter Hoepfer	512 E Main St	47,400.00	71.10	42,500.00	(4,900.00)	63.75	(7.35)
WPN-14-15-99-0V-038-01	Clover/Lawrie	19 Fond Du Lac St	25,000.00	37.50	25,000.00	-	37.50	-
WPN-14-15-99-SE-010-00	John E. Thark	124 E Main St	52,100.00	78.15	52,000.00	(100.00)	78.00	(0.15)
WPN-14-15-99-SE-020-00	Weimer-Harman, Inc.	116 E Main St	811,400.00	1,217.10	791,000.00	(20,400.00)	1,186.50	(30.60)
WPN-14-15-99-SE-090-00	Liebenow Construction	24 E Main St	95,300.00	142.95	153,500.00	58,200.00	230.25	87.30
WPN-14-15-99-SE-100-00	Hennings Homestown, Inc.	16 N Drummond St	31,600.00	47.40	27,000.00	(4,600.00)	40.50	(6.90)
WPN-14-15-99-TC-005-00	Farmers Elevator	2 W Main St	323,700.00	485.55	306,500.00	(17,200.00)	459.75	(25.80)
WPN-14-15-99-TC-030-00	Jill & Tim Vanderkin	12 W Main St	162,800.00	244.20	165,000.00	2,200.00	247.50	3.30
WPN-14-15-99-TC-040-00	Jill & Tim Vanderkin	20 W Main St	228,400.00	339.60	200,000.00	(28,400.00)	300.00	(39.60)
WPN-14-15-99-TC-095-00	Farmers Elevator	20 Commercial St	19,400.00	29.10	19,500.00	100.00	29.25	0.15
TOTAL FOND DU LAC COUNTY			7,009,000.00	10,513.50	7,029,000.00	20,000.00	10,543.90	30.40
TOTAL BID ASSESSMENT			11,274,900.00	16,912.35	11,477,000.00	202,100.00	17,215.90	303.15

Appendix B – 1988 Original BID District Map

City of Waupun Bid District



Legend
 Bid District

Appendix C – 2019 Operating Budget

SUMMARY OF TOTAL FUNDS				
Balance forward 2018	\$	2,803.67		
2018 Assessments @ \$1.50 per \$1,000 Deposited	\$	-		
Exterior Building Improvement Grants Expensed	\$	-		
Connect Communities/Ignite Program Expensed	\$	-		
Beautification Expensed	\$	-		
Waupun Chamber Advertisement Expensed	\$	-		
			\$ 2,803.67	Current Balance
2019 Future Assessments @ \$1.50 per \$1,000	\$	17,215.50		
Exterior Building Improvement Grants Yet to be Expensed	\$	2,000.00		
Connect Communities/Ignite Program Yet to be Expensed	\$	2,000.00		
Beautification Yet to be Expensed	\$	1,500.00		
Waupun Chamber Advertisement Yet to be Expensed	\$	500.00		
			\$ 15,519.17	BID Funds Available
CURRENT BALANCE				
\$ 2,803.67	Balance forward from December 31, 2018:			
\$ -	Assessments @ \$1.50 per \$1,000 Deposited			
		<u>Date Deposited</u>	<u>Vendor</u>	
\$ -	Exterior Building Improvement Grants Expensed			
		<u>Date Issued</u>	<u>Vendor</u>	<u>Amount Paid</u>
		<u>CK#</u>		
\$ -	Connect Communities/Ignite Program Expensed (\$2,000)			
		<u>Date Issued</u>	<u>Vendor</u>	<u>Amount Paid</u>
		<u>CK#</u>		
\$ -	Beautification Expensed (\$1500)			
		<u>Date Issued</u>	<u>Vendor</u>	<u>Amount Paid</u>
		<u>CK#</u>		
\$ -	Waupun Chamber Advertisement Expensed (\$500)			
		<u>Date Issued</u>	<u>Vendor</u>	<u>Amount Paid</u>
		<u>CK#</u>		
\$ 2,803.67	Current Balance:			
FUTURE FINANCIALS				
\$ 17,215.50	Assessments @ \$1.50 per \$1,000 Yet to be Deposited			
\$ 2,000.00	Exterior Building Improvement Grants Approved - Yet to be Expensed (<i>must be completed in 90 days</i>)			
		Approved 11-14-18	\$ 2,000.00 Ken Liebenow	(Expires 02/14/2019)
\$ 2,000.00	Connect Communities/Ignite Program (\$2,000)			
\$ 1,500.00	Beautification Yet to be Expensed (\$1500)			
\$ 500.00	Waupun Chamber Advertisement Yet to be Expensed (\$500)			
\$ 15,519.17	Available Funds for disbursement			