

# 2020 Operating Plan



BID Board of Directors  
Approved November 6, 2019  
Shorewood, Wisconsin 53211

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# **THE SHOREWOOD BUSINESS IMPROVEMENT DISTRICT 2020 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 districts to develop, manage, and promote the districts and to establish an assessment method to fund these activities." Upon petition from property owners within the Shorewood Business Improvement District (hereafter "BID"), the Village Board created the BID and adopted its initial operating plan in November of 1999.

Section 66.1109 (3) (b), Wis. Stats., requires that a BID Board "shall annually consider and make changes to the operation plan. The board shall then submit the operating plan to the local legislative body for approval." The Board of the Shorewood BID submits this 2020 BID operating plan in fulfillment of the statutory requirement.

This plan proposes a continuation and expansion of the activities described in the initial 1999 BID operating plan. Therefore, it incorporates by reference the earlier plans as adopted by the Village Board. 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 1999 BID operating plan is provided in Appendix A and B.

## **III. PROPOSED OPERATING PLAN 2020**

### **A. Plan Objectives**

The objectives of the BID are as follows:

- Promotion of the BID through special events, marketing campaigns, and media exposure.
- Promotion of the BID as a great place to own and operate a business.
- Act as a catalyst for private investment, attract new retailers and development to Shorewood, and assist the Village with its efforts to enhance the viability of the Village of Shorewood as a whole.

## **B. Proposed 2020 Activities**

Principal activities to be undertaken by the BID during 2020 include, but are not limited to:

1. Organize special events in 2020 that will drive traffic to the business district, as listed below. Two successful events were launched recently: the Shorewood Shenanigans event in 2018 and the Shorewood Feast event in 2019. The BID will also partner with other Village of Shorewood organizations to enhance community events.
2. Enhance Shorewood BID website and continue promoting, communicating, and engaging customers and stakeholders via social media and communications. A new website was launched June 2019.
3. Research and implement various beautification projects, such as pole banners along Oakland Avenue and Capitol Drive and replace or repair winter snowflake pole displays.
4. Actively promote the retail and redevelopment opportunities in the business district to commercial brokers, developers, and retailers in coordination with Village Manager, Community Development Authority, and Village Board.
5. Administer and promote the façade program and business loan program. The business loan program was placed on hold early 2019 for review by the Community Development Authority.
6. Act as a liaison to media, local and regional government, and Shorewood stakeholders.
7. Implement the BID Strategic Plan.

### **2020 Proposed BID Events**

- |                         |                                                                                                                                                                                                            |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| • Saturday March 14     | Shorewood Shenanigans<br><i>Block party and DIY pub crawl w/ shuttles</i>                                                                                                                                  |
| • Thursday June 25      | Shorewood Classic Cycling Criterium<br><i>Tour of America Dairyland bike race series.<br/>17th year in Shorewood</i>                                                                                       |
| • Saturday September 12 | Shorewood Feast<br><i>Multiple-block street festival with emphasis<br/>on cultural , activities and entertainment<br/>appealing to diverse community. Includes<br/>dinner in the middle of the street.</i> |
| • Saturday December 5   | WinterFest<br><i>Holiday tree lighting</i>                                                                                                                                                                 |

### C. 2017 Adopted Strategic Plan Summary

**Mission Statement:** The Shorewood Business Improvement District creates a thriving local & destination hub by branding and communicating both development and promotion to its stakeholders in the private and public sectors.

**Vision of Intended Future Impact:** Shorewood is a vibrant and cohesive 18-hour urban marketplace of distinctive, engaged and successful businesses.

#### Goals:

1. *Marketing and Branding:* Effectively and efficiently communicate the Shorewood Business District's unique value proposition to current and new customers, members, clients, users and influencers.
2. *Business Participation in the Business Improvement District:* Deepen and expand engagement of members of the business community to unify and grow.
3. *Business Recruitment and Retention:* Attract, retain and facilitate the development of a unique mix of sustainable businesses.

### D. Proposed 2020 Budget (see detail in attached budget, Appendix C)

<b><u>Income</u></b>	
<b>BID Assessment</b>	<b>\$116,939</b>
<b>CDA Contribution</b>	<b>\$5,000</b>
<b>Event Sponsorship &amp; Other</b>	<b>\$89,000</b>
<b><u>Affiliate Memberships</u></b>	<b><u>\$1,200</u></b>
<b>Total Income</b>	<b>\$212,139</b>
 <b><u>Expenses</u></b>	
<b>Administration and Management</b>	<b>\$65,038</b>
<b>Marketing Program</b>	<b>\$143,295</b>
<b><u>Shorewood Today</u></b>	<b><u>\$9,000</u></b>
<b>Total Expenses</b>	<b>\$217,333</b>

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. METHOD OF ASSESSMENT**

##### **A. Assessment Rate and Method**

As of January 1, 2019, the properties in the district had a total BID assessable value of \$156,569,401. This plan proposes to assess the taxable property in the district at a rate of \$1.10 per \$1,000 of assessed value for the purposes of the BID. In 2016 the rate increased from \$1.06 (original rate at BIDs formation) to \$1.10. Appendix A shows the projected BID assessment for each property as provided by the Village of Shorewood finance department. This rate remains below Wisconsin's average BID assessment rate of \$2.33, based on 2018 data of 81 active BIDs.

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 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 and a "cap" maximum contribution of \$5,000 per tax parcel was selected as the basic assessment method for the Shorewood BID.

The variables used to determine the regular BID assessments are:

- 1) The total assessed value of each tax key commercial parcel within the district; and
- 2) The specific dollar amount per \$1,000 of the assessed value of each tax key parcel.

##### **B. Excluded and Exempt Property**

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

*1) Sec. 66.1109 (5) (a): Real property used exclusively for residential purposes and real property that is exempted from general property taxes under s. 70.11 may not be specially assessed for purposes of this section.*

#### **V. VILLAGE ROLE IN DISTRICT OPERATION**

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

- 1) The Community Development Authority of the Village of Shorewood provides funding to the BID for administration and promotion of a Façade Improvement

Grant program, business and development recruitment, the business loan fund, and other initiatives. This is on an annual basis and is reviewed each budget year.

- 2) Monitor and, when appropriate, apply for outside funds, which could be used in support of the district.
- 3) Collect BID assessments; maintain the BID assessments in a segregated account; and disburse the BID assessments to the district.
- 4) Receive annual financial reports as required per Sec. 66.1109 (3) (c) of the BID law.
- 5) Encourage Milwaukee County, the State of Wisconsin, and other units of government to support the activities of the district.

## VI. BUSINESS IMPROVEMENT DISTRICT BOARD OF DIRECTORS AND STAFF

The Board's primary responsibility will be implementation of this operating plan. The current BID Board of Directors and staff are comprised as follows:

### A. Board of Directors

*As of 10/14/2019*

	Name	Business	Original Appointment	Current Adjusted Term
1	Adrienne Shea	Little Sprouts Play Cafe, Affiliate Member	9/4/2018. Filled term ending 5/31/20	2017 - 5/31/2020
2	Anne LePlae	Alliance Francaise de Milwaukee	10/1/2017. Filled term ending 5/31/20	2017 - 5/31/2020
3	Arthur Ircink, President	Wisconsin Foodie; Farmers Market Board, Affiliate Member	7/16/18. Filled term ending 5/31/20	2017 - 5/31/2020
4	Caroline Kreitlow, Vice President	Luxe the Salon	2017-19	2017 - 5/31/2020
5	Craig Bulluck	Edward Jones	6/3/19. Filled term ending 5/31/20. 2019-2022	2019 - 5/31/2022
6	David Price	Three Lions Pub	2012-14; Re-appt'd 6/3/19. 2019-2021	2019 - 5/31/2021
7	Gene Webb	North Shore Boulangerie	6/17/19. 2019-2022	2019 - 5/31/2022
8	Jake Bresette	Lake Effects Surf Shop	10/1/2017. Filled term ending 12/31/18.	2019 - 5/31/2022. 2nd Term
9	Lisa Castagnozzi	Just Goods	7/16/18. Filled CDA position.	2018 - 5/31/2021

10	Mary Wright	Jay Schmidt Group/KW Realty	6/3/19. 2019-2021	2019 - 5/31/2021
11	Nat Davauer	Draft & Vessel	6/3/19. 2019-2021	2019 - 5/31/2021
12	Ned Brookes, DMD	Acacia Dental Care	Filled term ending 5/31/20	2017 - 5/31/2020
13	Shannon Weber, Treasurer	North Shore Bank	6/3/19. 2019-2021	2019- 5/31/2021
14	Stephanie Sherman, Secretary	Affiliate Member, Harbor District	2015-2016	2016 - 5/31/2019*
15	Tr. Jessica Carpenter	Village Board Liaison		2019

\*awaiting village president to reappoint

## **BID Staff**

Ericka Lang, *Executive Director*  
Katie Ragan, *Marketing Coordinator*

## **B. BID Board Vacancy Process**

In response to a request by the village board president, beginning July 2018 the Business Improvement District revised the process for filling BID board vacancies. Prior to July 2018, BID board members created a nominating committee, evaluating board needs and outreach to potential candidates. The nominating committee then made a recommendation to the BID board meeting at which time the full board voted to recommend an appointment by the village board of trustees. BID board terms expired Dec 31st.

The revised process changes term expirations to May 31st to match the village's boards, commissions and committees terms. The BID retains a nominating committee and will solicit board members via traditional outlets, forwarding interested applicants to the village via the village's volunteer application. The village clerk receives applications and will forward applications to the BID director leading up to annual term expirations. The BID nominating committee will review and make recommendations to the BID board. Recommendations will be made to the village president and appointments made by the village board. The village president may participate in applicant reviews with the BID board.



## **VII. 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 purposes and objectives defined in this operating plan.

Section 66.1109 (3) (a) of the BID law requires the BID Board and the Village to annually review and make changes as appropriate in the operating plan. Therefore, while this document outlines in general terms, it focuses upon 2020 activities. Information on specific assessed values, budget amounts, and assessment amounts are based on 2019 conditions. Greater detail about subsequent years' activities will be provided in the required annual plan updates. Approval by the Village board of trustees 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 Village of Shorewood.

## **VIII. 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.

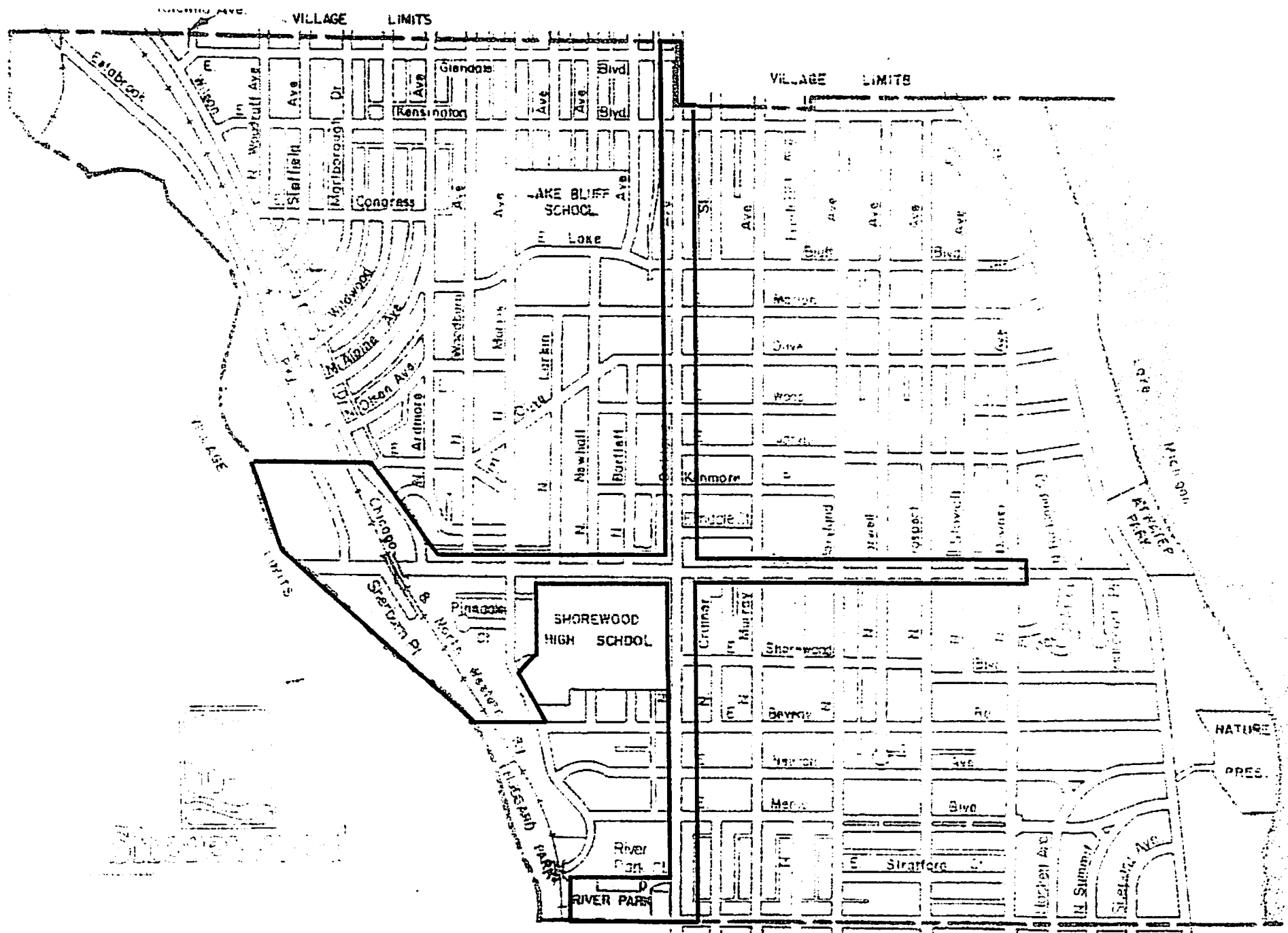
Should the legislature amend the statute to narrow or broaden the process of a BID so as to exclude or include as assessable properties of a certain class or classes of properties, then this BID operating plan may be amended by Village of Shorewood Trustees as and when it conducts its annual review and 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 Assessment for 2020 BID Revenue					
			GROSS	MIXED	2019	2018	BID RATES	
TAX KEY	ADDRESS	OWNER	ASSESSMENT	USE %	COMMERCIAL	COMMERCIAL	1.10	
	Totals				ASSESSMENT	ASSESSMENT	1,000.00	Business Names
240-9974	1100 E CAPITOL DR	WI-MILWAUKEE 1100 E CA	3,760,000	100.00%	3,760,000	3,760,000	4,136.00	Tower
275-8993	1111 E CAPITOL DR	HARBOR CHASE	19,907,400	100.00%	19,907,400	15,877,600	5,000.00	Harbor Chase
240-9977	1200 E CAPITOL DR	KIVELY INVESTMENTS	863,700	100.00%	863,700	863,700	950.07	Lakeside Remax, etc
275-8999-001	1305 E CAPITOL DR	1305 CAPITOL LLC	1,439,700	100.00%	1,439,700	1,439,700	1,583.67	Corner Bakery
275-1088	1325 E CAPITOL DR	1325 CAPITOL LLC	2,111,700	100.00%	2,111,700	2,111,700	2,322.87	Culvers
240-9983	1330 E CAPITOL DR	EKL INVESTMENTS	604,000	100.00%	604,000	604,000	664.40	Shorewood Auto
240-0412	1400 E CAPITOL DR	WILLIAM HO	473,100	100.00%	473,100	406,600	520.41	Offices
275-1086-001	1409 E CAPITOL DR	WINDERMERE PROPERTIE	1,218,000	100.00%	1,218,000	1,043,500	1,339.80	Office
240-0413	1410 E CAPITOL DR	VIRGINIA LITTLE	588,400	100.00%	588,400	588,400	647.24	State Farm, etc
275-1085	1421 E CAPITOL DR	CAP LANE REALTY	681,100	100.00%	681,100	579,500	749.21	Thompson Pharmacy
275-1084	1425 E CAPITOL DR	MORRIS AVE PROPERTIES	570,500	100.00%	570,500	483,400	627.55	Trilogy ,etc
275-1083	1431-33 E CAPITOL DR	DOMINION 1 LLC*	1,496,400	14.33%	214,494	158,147	235.94	Grande Flowers, etc
275-1069-001	1513 E CAPITOL DR	E CAPITOL #2 LLC	1,041,400	100.00%	1,041,400	1,041,400	1,145.54	Mobil
240-0358	1518 E CAPITOL DR	JAMES PETR	206,700	100.00%	206,700	206,700	227.37	Milwaukee PC, etc
240-0359	1520-22 E CAPITOL DR	CAPLAR LLC	195,900	100.00%	195,900	195,900	215.49	Nick's Barber, etc
240-0360	1530 E CAPITOL DR	WELLS FARGO BANK	274,400	100.00%	274,400	274,400	301.84	Wells ATM
240-0136	1572 E CAPITOL DR	NORTHWOODS ADVISOR	2,450,000	100.00%	2,450,000	2,450,000	2,695.00	Northwoods
240-0101	1602 E CAPITOL DR	SPRING EAST LLC	748,700	100.00%	748,700	748,700	823.57	BP
240-0020	1700 E CAPITOL DR	NOAH CHRISTENSON	455,000	100.00%	455,000	455,000	500.50	Shorewood Press
240-0021	1706 E CAPITOL DR	KEITH JOHNSON*	350,600	100.00%	350,600	350,600	385.66	Brighter Concepts
240-0022	1716 E CAPITOL DR	MICHAEL YERUKHIMOVIC	547,000	100.00%	547,000	461,500	601.70	Chemistry in Place, etc
240-0190	1720 E LAKE BLUFF BLVD	GRIFFIN INVESTMENTS, L	647,600	100.00%	647,600	457,400	712.36	Lake Bluff Dental
276-0730-001	1901 E. CAPITOL DR	SETON TOWER CORP	1,827,300	100.00%	1,827,300	1,827,300	2,010.03	Vacant -Shorewood Physicians
239-0680	1906-26 E CAPITOL DR	KAGEL-SEGAL REAL ESTA	569,800	100.00%	569,800	659,500	626.78	Clicks, etc
239-0681	1928-32 E CAPITOL DR	GENEVIEVE CAHILL	671,800	100.00%	671,800	580,000	738.98	Main Salon
276-0764	2011 E CAPITOL DR	4TH CHURCH OF CHRIST	EXEMPT	100.00%	0	0.00	0.00	Church
276-0762-001	2025 E CAPITOL DR	FEERICK INC	1,209,000	100.00%	1,209,000	1,209,000	1,329.90	Feerick Funeral
276-0780	2101 E CAPITOL DR	YUAN H HAN	402,200	100.00%	402,200	340,200	442.42	Capital Cleaners
276-0779	2107-09 E CAPITOL DR	PAUL HACKBARTH	1,155,100	100.00%	1,155,100	1,155,100	1,270.61	Atrium
276-0777	2127 E CAPITOL DR	THE MORRISON LLC	1,798,100	8.50%	152,767	117,916	168.04	Oficles
276-0630	2201-13 E CAPITOL DR	CAPITOL & MARYLAND LL	1,234,000	100.00%	1,234,000	1,234,000	1,357.40	City Market, etc
276-0605	2219-23 E CAPITOL DR	EDMUND BK YUN	555,000	100.00%	555,000	470,000	610.50	Luxe, etc
276-0577	2317-23 E CAPITOL DR	MICHAEL SCHRAM	710,800	100.00%	710,800	602,300	781.88	Edward Jones, etc
239-0113	2400 E CAPITOL DR	LPT 45 LLC CAC 45 LLC	385,600	100.00%	385,600	1,680,001	424.16	parking lot
239-0114	2418 E. CAPITOL DR	ROSE MARY D'AGOSTINO	170,000	100.00%	170,000	170,000	187.00	Sunseekers
239-0255	2420 E CAPITOL DR	ROSE MARY D'AGOSTINO	450,200	100.00%	450,200	645,300	495.22	Sunseekers
239-0223	2500 E CAPITOL DR	ROSENE LLC	669,900	100.00%	669,900	669,900	736.89	Shorewood Vet
239-0222	2510 E CAPITOL DR	2510 CAPITOL RE	567,000	100.00%	567,000	567,000	623.70	Sweet Law Firm
239-0221	2514-16 E CAPITOL DR	JOEL PECH	374,400	100.00%	374,400	317,100	411.84	Pech Investments
239-0220	2520-22 E CAPITOL DR	ANITA KRIER	701,200	100.00%	701,200	586,600	771.32	Chattel Changes
276-0036	2521 E CAPITOL DR	DOWNER MOBIL	747,300	100.00%	747,300	747,300	822.03	Mobil
276-0555-001	3506-14 N OAKLAND AVE	KONSTATINE DIMITROPO	1,985,800	100.00%	1,985,800	1,680,000	2,184.38	Sherwin Williams, etc
276-0556	3524-30 N OAKLAND AVE	WILLIAM HO	958,200	100.00%	958,200	958,200	1,054.02	William Ho
275-1180	3547-59 N OAKLAND AVE	3553 OAKLAND LLC	3,769,000	25.00%	942,250	800,000	1,036.48	Harry's, etc
275-1181	3575 N OAKLAND AVE	3575 OAKLAND LLC	3,659,700	20.00%	731,903	619,969	805.09	Harley's, etc
276-0170	3592-96 N OAKLAND AVE	HONEST BLUE PROPERTIE	562,000	100.00%	562,000	562,000	618.20	Crave Café
276-0185	3600 N OAKLAND AVE	SIK KIN NG	899,100	100.00%	899,100	899,100	989.01	East Gardens
275-1026	3601 N OAKLAND AVE	DR J'S BONE GARDEN	997,400	100.00%	997,400	997,400	1,097.14	North Shore Funeral
276-0186	3610 N OAKLAND AVE	3610 N OAKLAND LLC	476,600	100.00%	476,600	476,600	524.26	Offices
276-0187	3624 N OAKLAND AVE	BEG ENTERPRISES	450,500	100.00%	450,500	450,500	495.55	BP
275-1150	3723 N. Oakland Ave.	SRD CORPORATION	357,800	100.00%	357,800	357,800	393.58	Bayshore Vet
275-1120	3801-13 N OAKLAND AVE	GOLDENBERG & ASSOCIA	1,201,700	100.00%	1,201,700	980,100	1,321.87	Miss Cupcake, etc
276-0031-176	3840 N OAKLAND AVE #176	NOVASIC SHWD PROPERT	226,000	100.00%	226,000	226,000	248.60	Eastwood mixed use. Condo
275-8991	3900 N. ESTABROOK PKW	SHOREWOOD SENIOR AP	0	100.00%	0	0	excluded	Sherman Apts
276-0576	3951-55 N PROSPECT AVE	SCOTT ST PETER	528,400	100.00%	528,400	423,600	581.24	St. Moritz Salon
276-0765	3956 N MURRAY AVE	CAPITOL 48 LLC	322,500	100.00%	322,500	297,800	354.75	Wisconsin Gazette
276-0749-006	3970 N OAKLAND AVE	WI ROBINSON FAMILY	2,700,000	100.00%	2,700,000	2,700,000	2,970.00	Office building

			2019 Assessment for 2020 BID Revenue					
			GROSS	MIXED	2019	2018	BID RATES	
TAX KEY	ADDRESS	OWNER	ASSESSMENT	USE %	COMMERCIAL ASSESSMENT	COMMERCIAL ASSESSMENT	1.10 1,000.00	Business Names
240-0017	4000 N WILSON DR	REHMAN PROPERTY LLC	407,400	100.00%	407,400	407,400	448.14	Amstar
239-0676	4000-06 N OAKLAND AVE	1800 E CAPITOL DR LLC	1,948,200	100.00%	1,948,200	1,610,000	2,143.02	Vision Works, etc
239-0219	4001 N DOWNER AVE	WILLIAM QUANDT*	744,200	100.00%	744,200	728,600	818.62	Vacant -Hayek's
240-0023	4009-15 N OAKLAND AVE	NS APTS LLC	4,435,200	100.00%	4,435,200	3,687,100	4,878.72	Anytime Fitness, etc
239-0675	4010-14 N OAKLAND AVE	CAMILLA AVERY	1,201,200	100.00%	1,201,200	1,008,400	1,321.32	CC Conrad, etc
240-0012	4012-26 N WILSON	MONTROSE APTS	4,343,400	13.09%	568,421	442,341	625.26	Dahlia Bloom, etc
239-0674	4016-22 N OAKLAND AVE	OAKLAND AVENUE LLC*	670,800	100.00%	670,800	670,800	737.88	Brat House
240-0024	4023 N OAKLAND AVE	SENDIKS II LLC*	1,021,900	100.00%	1,021,900	771,900	1,124.09	Ascension
240-0025	4027 N OAKLAND AVE	SENDIKS II LLC*	1,178,100	100.00%	1,178,100	928,100	1,295.91	Ascension
240-0579-000	4041 N. OAKLAND AVE	WALGREEN'S INC	5,620,000	100.00%	5,620,000	5,620,000	5,000.00	Walgreens
239-0647	4042-46 N OAKLAND AVE	HACKBARTH COMMERICA	1,011,400	100.00%	1,011,400	856,600	1,112.54	Camp
239-0646	4050 N. OAKLAND AVE	315 GRANBY RDATE LLC*	500,700	100.00%	500,700	500,700	550.77	School of Rock, etc
240-9978	4057 N WILSON	VILLAGE OF SHOREWOOD	EXEMPT	100.00%	0	0	0.00	PD
239-0645	4060 N OAKLAND AVE	1405 ELMDALE CTEN*	989,600	100.00%	989,600	296,600	1,088.56	North Shore Bank
240-0054-003	4075 N OAKLAND AVE	MDC COASTAL 7, LLC	38,370,000	100.00%	38,370,000	25,253,500	5,000.00	Metro Market
239-0565-001	4106-14 N OAKLAND AVE	JOHN OGDEN	1,611,100	100.00%	1,611,100	1,800,000	1,772.21	Casa de Corazon
240-0054-002	4115 N OAKLAND AVE	MDC COASTAL 7, LLC	0	100.00%	0	8,180,800	0.00	Metro Market Parking Deck
239-0378	4144 N OAKLAND AVE	PALMETTO	699,500	100.00%	699,500	699,500	769.45	Vacant -Ruckus
240-0054-001	4154-4195 N OAKLAND AVE	GENCAPP SHOREWOOD A	19,441,300	16.00%	3,110,608	2,628,000	3,421.67	The Mosaic
239-0379	4156-66 N OAKLAND AVE	PALMETTO	1,181,700	100.00%	1,181,700	1,181,700	1,299.87	Benji's, etc
239-0380	4170 N OAKLAND AVE	4170 N OAKLAND LLC	500,000	100.00%	500,000	500,000	550.00	Starbucks
240-9994-001	4201-15 N OAKLAND AVE	TCF BANK*	999,000	100.00%	999,000	999,000	1,098.90	TCF Bank
239-0307	4208-12 N OAKLAND AVE	EUGENE KASPRZAK	549,900	100.00%	549,900	469,000	604.89	Glow Salon, etc
239-0308-000	4214 N. Oakland Ave.	GIBSON INVESTMENTS LL	577,600	100.00%	577,600	577,600	635.36	Powers Realty
239-0309	4230 N OAKLAND AVE	FREDERIC WEIN	315,000	100.00%	315,000	315,000	346.50	UPS
240-9996	4231 N OAKLAND AVE	BV SHOREWOOD LLC	880,000	100.00%	880,000	880,000	968.00	PNC Bank
239-0291	4300 N OAKLAND AVE	SHIRLEY CARLSON*	412,500	100.00%	412,500	488,200	453.75	Shorewood Queensway
240-9997	4301 N OAKLAND AVE	BLANKENSTEIN ENTERPR	980,000	100.00%	980,000	980,000	1,078.00	Caribou-Einstein Bagels
239-0292-001	4312-34 N OAKLAND AVE	ERASTUS INVESTMENTS I	2,211,500	100.00%	2,211,500	1,874,000	2,432.65	Sherwin Williams, etc
240-0189	4401-11 N OAKLAND AVE	BARBARA KUEHN	798,900	100.00%	798,900	798,900	878.79	North Shore Boulangerie, etc
240-0188	4413-17 N OAKLAND AVE	BLACKBIRD MERCANTILE	407,300	100.00%	407,300	341,700	448.03	Draft & Vessel
239-0154	4414 N OAKLAND AVE	NORTH SHORE BANK	1,550,000	100.00%	1,550,000	1,550,000	1,705.00	Vacant-North Shore Bank
240-0187	4419 N OAKLAND AVE	BARBARA KUEHN	555,800	100.00%	555,800	555,800	611.38	Men's Room
240-0186	4425-29 N OAKLAND AVE	MARQUIS LLC	614,300	100.00%	614,300	518,700	675.73	Goody Gourmets, etc
240-0185-001	4433-39 N OAKLAND AVE	RALPH HOFFMAN	765,500	100.00%	765,500	765,500	842.05	Forever Young, etc.
236-9992	4447 N OAKLAND AVE	PATRICIA MAGESTRO*	482,200	100.00%	482,200	482,200	530.42	Offices
236-9993	4449-53 N OAKLAND AVE	4449 OAKLAND LLC	430,400	100.00%	430,400	370,600	473.44	Just Goods
236-0004	4465 N OAKLAND AVE	JOSEPH ULLRICH	723,200	100.00%	723,200	723,200	795.52	Offices
236-0002-001	4473-79 N OAKLAND AVE	BK OAKLAND	670,000	100.00%	670,000	670,000	737.00	Curves, etc
237-0230	4484 N OAKLAND AVE	GRAMOLL OAKLAND LLC	451,800	100.00%	451,800	451,800	496.98	American Family
237-0231	4488-92 N OAKLAND AVE	4488 LLC	796,400	100.00%	796,400	672,100	876.04	Cloud Red
236-0610	4493 N OAKLAND AVE	VALLIS LLC	1,000,000	100.00%	1,000,000	1,000,000	1,100.00	Stowell Staffing Condo
236-0611	4495 N OAKLAND AVE	TLN SHOREWOOD LEASIN	924,400	100.00%	924,400	924,400	1,016.84	Medical Condo
237-0232	4496 N OAKLAND AVE	TIM WICK*	471,600	100.00%	471,600	413,500	518.76	Vacant -Kensington Liquor
236-0173	4501-03 N OAKLAND AVE	DONALD WEISNER	225,000	100.00%	225,000	225,000	247.50	No.1 Chinese
236-0172	4507 N OAKLAND AVE	LORENZO DRAGHICCIO	191,800	100.00%	191,800	191,800	210.98	Broker
236-0171	4511-17 N OAKLAND AVE	WINDERMERE PROPERTIE	1,322,000	100.00%	1,150,000	1,150,000	1,265.00	Three Lions/NaNa
237-0233-001	4514 N OAKLAND AVE	EXCHEQUER	9,491,400	22.40%	2,126,074	1,680,000	2,338.68	The Cornerstone
236-0167	4541 N. OAKLAND AVE	CORELOGIC	8,270,600	17.40%	1,439,084	1,218,000	1,582.99	The Ravenna
236-0250	4559 N OAKLAND AVE	SHWD GROUP GEN PART	1,690,900	100.00%	1,690,900	1,690,900	1,859.99	Shorewest
236-0305	4601 N OAKLAND AVE	4601 NORTH OAKLAND LL	1,050,000	100.00%	1,050,000	1,050,000	1,155.00	La Dea, etc
236-0304	4611 N OAKLAND AVE	DAVID HICKEY	116,300	100.00%	116,300	116,300	127.93	Salons at 4611
	*indicates change in ownership		199,725,700		156,569,401	146,300,673	116,939.20	

APPENDIX B: 1999 BID BOUNDARY MAP



# APPENDIX C

## Shorewood Business Improvement District 2020 Budget

Name	2019 Budget	Remain- ing 2019	Projected 2019	2020 Budget (\$1.10)	% Change 19 - 20
<b>Income</b>					
<b>Affiliate Membership</b>	1,200	(0)	806	1,200	0%
<b>CDA</b>	5,000	1,790	5,000	5,000	0%
<b>Event Revenues</b>	3,500	-	-	-	-
Shenanigans	-	-	1,512	1,500	-
Bike Criterium	-	-	1,250	1,000	-
Feast	-	-	23,077	30,000	-
WinterFest	-	-	-	-	-
<b>Fee Assessment</b>	114,456	-	114,456	116,939	2%
<b>Sponsorship Revenue</b>	-	-	-	-	-
Shenanigans	2,000	-	5,250	5,000	150%
Health & Wellness	-	-	-	-	-
Bike Criterium	13,000	-	18,000	17,000	31%
Feast	10,000	-	20,500	32,000	220%
WinterFest	2,250	1,550	2,150	2,500	11%
<b>Total Income</b>	<b>151,406</b>	<b>3,340</b>	<b>192,000</b>	<b>212,139</b>	<b>40%</b>
<b>Expense</b>					
<b>Administrative</b>	-	-	-	-	-
Accounting	1,600	124	1,900	1,300	-19%
Bank Service Charges	0	-	10	0	-
BID Management Fee	48,000	10,000	50,000	48,000	0%
Dues and Subscriptions	1,920	177	1,779	1,653	-14%
Employment Expenses	-	-	-	8500	-
Liability Insurance	400	-	560	560	40%
Office Supplies	100	-	50	75	-25%
Postage and Delivery	400	-	1,578	750	88%
Printing and Reproduction	350	34	500	300	-14%
Seminars & Conferences	1,300	-	105	1200	-8%
Administrative - Other	-	0	301	200	-
<b>Total Administrative</b>	<b>56,740</b>	<b>10,335</b>	<b>56,783</b>	<b>65,038</b>	<b>15%</b>
<b>Advertising</b>	3,770	566	3,070	5,550	47%
Shenanigans	650	-	865	800	-
Bike Criterium	600	-	370	400	-
Feast	2,000	-	1,330	3,000	-
WinterFest	100	-	105	150	-
Health & Wellness	-	-	-	1,000	-
Other	420	-	400	200	-
<b>Elavon fees</b>	0	-	6	30	-
<b>Event Supplies</b>	9,750	2,500	16,327	18,000	85%
Shenanigans	2,000	-	2,436	1,500	-
Bike Criterium	3,650	-	4,700	4,000	-
Feast	2,000	-	6,691	10,000	-
WinterFest	1,500	-	2,500	2,500	-
Health & Wellness	-	-	-	-	-
Other	600	-	-	-	-
<b>Licenses and Permits</b>	-	-	225	675	-
<b>Marketing Director Programs</b>	-	-	-	-	-
Director Fees	28,000	8,000	30,021	32,000	14%
Civic Participation	1,000	-	2,050	2,250	125%
Other Marketing	-	-	-	2,500	-
Wayfinding	4,000	-	0	-	-100%
Recruitment	-	-	-	2,500	-
Constituent Relations	2,670	1,918	2,000	2,500	-6%
Beautification	-	-	-	25,000	-
Snowflake decorations	-	-	-	20,000	-
Pole banners	-	-	-	5,000	-

Name	2019 Budget	Remain- ing 2019	Projected 2019	2020 Budget (\$1.10)	% Change 19 - 20
Shorewood Today	10,475	1,500	9,000	9,000	-14%
Web Hosting & Updating	3,620	208	3,850	1,500	-59%
Outside Services	15,940	600	36,000	49,540	
Shenanigans	1,100	0	3,102	2,500	127%
Bike Criterium	11,640	0	12,063	11,240	-3%
Feast	2,000	0	20,038	35,000	1650%
WinterFest	400	0	600	600	50%
Other	800	0	197	200	-75%
Paypal fees	300	5	30	50	-83%
Security	1,500	0	1,048	1,200	-20%
Shenanigans		0	479	500	
Feast		0	569	700	
<b>Total Marketing &amp; Other</b>	<b>81,025</b>	<b>14,731</b>	<b>103,627</b>	<b>152,295</b>	<b>88%</b>
<b>Total Expense</b>	<b>137,765</b>	<b>25,065</b>	<b>160,409</b>	<b>217,333</b>	<b>58%</b>
<b>Net Ordinary Income</b>	<b>13,641</b>		<b>31,591</b>	<b>-5,194</b>	
Other Income					
Interest			130		
Estimated Fund Balance Carryover to 2020			67,704		