

CITY OF WAUPUN



2022 Business Improvement District Operational Plan

Draft

Approved by BID
10/13/21;
Approved by
Common Council
10/19/21

THE WAUPUN BUSINESS IMPROVEMENT DISTRICT 2022 OPERATING PLAN

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 2021. This plan does not repeat the background information that is contained in the initial operating plan.

DISTRICT BOUNDARIES

A calculation of the BID assessment and the original 1988 map of the district is provided in Appendix A and Appendix B.

2022 OPERATING PLAN

The goals, objectives, and strategies of the 2022 Operating Plan is provided in Appendix C. Estimated revenues and expenditures can be seen in Appendix D.

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 was 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.

METHOD OF ASSESSMENT

A. Assessment Rate and Method

As of December 31, 2021, the properties in the district have estimated total BID assessable

value of \$17,472.45. 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 2021 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 the municipality to determine whether 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 be receive the direct financial benefits of the BID, such as in the case of the Façade Improvement Program.

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 the Façade Improvement Grant program, business and development recruitment, and other initiatives. This is updated 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.

BOARD MEMBERS AND STAFF

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
At-Large Representative	Austin Armga	April 30, 2022
BID Representative	Krista Bishop (Chair)	April 30, 2023
At-Large Representative	Kate Bresser	April 30, 2023
BID Representative	Terri Crisp	April 30, 2024
BID Representative	Gary DeJager	April 30, 2023
BID Representative	Jonathan Leonard	April 30, 2023
At-Large Representative	Jodi Mallas	April 30, 2023
BID Representative	Rich Matravers	April 30, 2022
BID Representative	Tyler Schulz	April 30, 2022
At-Large Representative	Teresa Ruch (Vice-Chair)	April 30, 2021

Staff

Name	Position
Julie Nickel	Mayor – Ex-Officio Member
Kathy Schlieve	City Administrator/Director of Economic Development
Sarah Van Buren, AICP	Community & Economic Development Coordinator
Zac Dickhut	Interim Executive Director – Waupun Area Chamber of Commerce

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.

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 2021 activities. Information on specific assessed values, budget amounts, and assessment amounts are based on 2020 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 operation 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.

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 the statute invalid or unconstitutional, its decision will not be 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 to exclude or include as assessable properties of a certain class or classes of properties, 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 Se. 66.1109(3)(b)

Appendix A – Calculation of 2022 Assessed Values

Appendix B – 1988 Original BID Map

Appendix C – 2022 Operating Plan Goals, Objectives, and Strategies

Appendix D – 2022 Budget

Appendix A – Calculation of 2022 Assessed Values

	Dodge	Fond du Lac	Total
2021 Assessed Value (Commercial Properties)	\$ 4,620,600	\$ 7,027,700	
divided by 1,000	4,621	7,028	
Assessment Rate	<u>\$ 1.50</u>	<u>\$ 1.50</u>	
2021 BID Assessment for 2022 BID Budget	\$ 6,930.90	\$ 10,541.55	\$ 17,472.45
2020 BID Assessment for 2021 BID Budget	\$ 6,851.85	\$ 10,517.40	\$ 17,369.25
Increase/(Decrease) in BID Budget	\$ 79.05	\$ 24.15	\$ 103.20
Increase in assessed value	52,700.00	16,100.00	68,800.00

Appendix B – 1988 Original BID District Map

City of Waupun Bid District



Legend
 Bid District

Appendix C – 2022 Operating Plan Goals, Objectives, and Strategies

Initiative	Timeframe	Cost	Assigned to	Other Involvement	Measurable
Objective 1: Be a voice for the Downtown Waupun community (Organization)					
Strategy 1: Communicate and solicit feedback from our members					
1 Review and update of Operational Plan	Summer	\$0	City	BID Board	Updated Plan
2 Serve as main contact for downtown concerns and solutions	ongoing	\$1,000	City	BID Board	Complete as needed
Strategy 2: Staff and Board Development					
3 Recruit, develop, and engage board members	ongoing	\$0	City	BID Board	
4 Recruit, orient, and train new board members, when applicable	ongoing	\$0	City	BID Board	Complete training, as needed
Strategy 3: Raise the profile of the Business Improvement District					
5 Host an annual meeting and publish an annual report, as defined by state statute	February	\$250	City	BID Board	Number of attendees and feedback on report
Objective 2: Positively market Downtown Waupun (Promotion)					
Strategy 1: Utilize various marketing methods to attract customers with disposable income					
6 Implement the latest social media trends	ongoing	\$0	City	BID Board, Waupun Area Chamber of Commerce	Implementation
Strategy 2: Market special events that will be a regional tourist draw and will create local economic impact					
7 Saturday Farmer's Market, Halloween on Main, Wine Walk, Winter Wonderland.	ongoing	\$0	City	Waupun Downtown Promotions	Increase in attendance, participation, and economic impact
8 Promote local events such as parades, concerts and classes which take place in the downtown district.	ongoing	\$750	City	Waupun Downtown Promotions	Improved open rate, Increase in Facebook reach
Objective 3: Improve the aesthetic/visual appeal of Downtown Waupun (Design)					
Strategy 1: Work to assist property owners in renovation projects					
9 Work with property owners to apply, evaluate, and award Façade Improvement Grants	ongoing	\$7,669	City	BID Board	Number of inquiries and applications
10 Continue to educate property owners on various financial assistance programs to encourage property redevelopment.	ongoing	\$0	City	Envision Greater Fond du Lac	Usage of programs
Strategy 2: Assist with maintaining a downtown environment that is clean, safe, comfortable and welcoming					
11 Continue partnership with the Fond du Lac Police, the Building Inspector, and the Department of Public Works to manage safety, parking, and aesthetic issues	ongoing	\$0	City	Police, Building Inspector, DPW	Complete as issues arise
Strategy 3: Support the implementation of elements from the Streetscaping Plan, including amenities that are visually consistent and cohesive in design with the rest of the downtown district.					
12 Continue to support the Downtown Design Guidelines and the Community Development Authority to bring design consistency to the district	ongoing	\$0	City	BID Board and CDA	Current city ordinances to support
13 Seasonal Planting Program	May	\$1,500	City	City; Farm and Home, Rens, WAHS Horticulture Students	Beautiful planters
14 Support implementation of the Downtown Streetscaping & Redevelopment Plan	Major push in spring, then ongoing	\$2,000	City	BID Board and CDA	New initiatives being implemented
Objective 4: Attract, retain, and facilitate development of a unique mix of sustainable businesses in coordination with the City and CDA (Economic Vitality)					
Strategy 1: Create, promote and implement financial assistance programs					
15 Inform potential business and property owners on available incentive programs	ongoing	\$0	City	BID Board and Envision Greater Fond du Lac	Number of inquiries
16 Educate and keep relationships with realtors, lenders, property owners and other economic development agencies on financial programs	ongoing	\$0	City	Envision Greater Fond du Lac	Number of contacts
Strategy 2: Work to retain downtown businesses					
17 Maintain a business retention program meet with property/business owners. Identify businesses with expansion plans or succession planning needs.	ongoing	\$0	City	Waupun Area Chamber of Commerce and Envision Greater Fond du Lac	Meetings and follow thru reporting
18 Provide educational opportunities to support the growth of downtown business owners	ongoing	\$1,000	City	Waupun Area Chamber of Commerce and Envision Greater Fond du Lac	Meetings and follow thru reporting
Strategy 3: Work to attract new downtown businesses					
19 Follow up on leads of businesses looking to open, expand or relocate	ongoing	\$0	City	Envision Greater Fond du Lac	Number of contacts
20 Develop and implement a pop-up grant program	ongoing	\$3,000	City	IGNITE Partner organizations	
Total Proposed Expenditures		\$17,369.25			

Appendix D – 2022 Budget

Income	Budget
(Anticipated)Balance as of December 31, 2021	
2022 Assessment @\$1,50 per \$1,000	\$ 17,472.45
Total Income	\$17,472.45
Expenses	Budget
Design	
Façade Improvement Grants	\$7,869.25
Seasonal Planting	\$ 1,500.00
Implementation of Streetscaping Plan	\$ 2,000.00
Total Design	\$11,369.25
Economic Vitality	
Educational Workshops for Downtown Businesses	\$1,000.00
Pop-Up Waupun	\$3,000.00
Total Economic Vitality	\$4,000.00
Organization	
BID Annual Audit	\$1,000.00
Annual Report	\$250.00
Total Organization	\$1,250.00
Promotions	
BID Advertising	\$750.00
Total Promotions	\$750.00
Total Expenses	\$17,369.25
Net Ordinary Income	\$ 103.20
Net Income (Loss)	\$ 103.20