



# City of Appleton

100 North Appleton Street  
Appleton, WI 54911-4799  
[www.appleton.org](http://www.appleton.org)

## Meeting Agenda - Final City Plan Commission

*Any questions about items on this meeting are to be directed to  
the Community and Economic Development Department,  
920-832-6468.*

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Tuesday, August 21, 2018

4:00 PM

Council Chambers, 6th Floor

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1. Call meeting to order
2. Roll call of membership
3. Approval of minutes from previous meeting

[18-1226](#) City Plan Minutes from 8-7-18

Attachments: [City Plan Minutes 8-7-18.pdf](#)

#### 4. Public Hearings/Apearances

[18-1227](#) Rezoning #9-18 for the Apple Ridge Annexation, formerly part of the Town of Grand Chute, located at the southeast corner of N. Ballard Road and E. Apple Creek Road, including to the centerline of existing adjacent right-of-way, as shown on the attached maps, from Temporary AG Agricultural District to R-1B Single-Family District (Associated with Action Item #18-1228)

Attachments: [InformalPublicHearingNotice AppleRidge Rezoning.pdf](#)

#### 5. Action Items

[18-1228](#) Request to approve Rezoning #9-18 for the Apple Ridge Annexation, formerly part of the Town of Grand Chute, located at the southeast corner of N. Ballard Road and E. Apple Creek Road, including to the centerline of existing adjacent right-of-way, as shown on the attached maps, from Temporary AG Agricultural District to R-1B Single-Family District

Attachments: [StaffReport Rezoning AppleRidgeAnnexation 8-21-18.pdf](#)

[18-1229](#) Request to approve the Apple Ridge Preliminary Plat as shown on the attached maps and subject to the attached conditions

Attachments: [StaffReport PrePlat AppleRidge 8-21-18.pdf](#)

[18-1230](#)

**\*\*CRITICAL TIMING\*\*** Annual review and request to approve the Downtown Appleton Business Improvement District (BID) 2019 Operating Plan

**Attachments:** [StaffReport 2019BIDOperatingPlan For08-21-18.pdf](#)  
[2019 BID Operational Plan.pdf](#)  
[2017 BID Annual Report.pdf](#)  
[2017 BID Audit - Financial Statements.pdf](#)  
[2017 BID Audit - Management Communications.pdf](#)

## **6. Information Items**

## **7. Adjournment**

*Notice is hereby given that a quorum of the Common Council may be present during this meeting, although no Council action will be taken.*

*Reasonable Accommodations for Persons with Disabilities will be made upon Request and if Feasible.*



# City of Appleton

100 North Appleton Street  
Appleton, WI 54911-4799  
[www.appleton.org](http://www.appleton.org)

## Meeting Minutes - Final City Plan Commission

*Any questions about items on this meeting are to be directed  
to the Community and Economic Development Department,  
920-832-6468.*

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Tuesday, August 7, 2018

4:00 PM

Council Chambers, 6th Floor

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1. Call meeting to order

**Meeting called to order at 4:00 p.m.**

2. Roll call of membership

**Present:** 6 - Mayor Hanna, Buetow, Uslabar, Rabec, Palm and Lobner

3. Approval of minutes from previous meeting

[18-1165](#)

City Plan Minutes from 7-10-18

**Attachments:** [City Plan Minutes 7-10-18.pdf](#)

**Lobner moved, seconded by Buetow, that the Minutes be approved. Roll Call.  
Motion carried by the following vote:**

**Aye:** 6 - Mayor Hanna, Buetow, Uslabar, Rabec, Palm and Lobner

4. Public Hearings/Appearances

5. Action Items

[18-1166](#)

Request to approve the Apple Ridge Annexation, located at the southeast corner of N. Ballard Road and E. Apple Creek Road currently in the Town of Grand Chute, as shown on the attached maps, and establish a temporary zoning classification of AG Agricultural District, subject to the stipulation in the attached staff report

**Attachments:** [StaffReport\\_AppleRidge\\_Annexation\\_For08-07-18.pdf](#)

**Lobner moved, seconded by Buetow, that the Report Action Item be recommended for approval. Roll Call. Motion carried by the following vote:**

**Aye:** 6 - Mayor Hanna, Buetow, Uslabar, Rabec, Palm and Lobner

6. Information Items

7. Adjournment

**Lobner moved, seconded by Uslabar, that the meeting be adjourned at 4:03 p.m. Roll Call. Motion carried by the following vote:**

**Aye:** 6 - Mayor Hanna, Buetow, Uslabar, Rabec, Palm and Lobner



**NOTICE OF INFORMAL PUBLIC HEARING**  
**OF THE**  
**APPLETON CITY PLAN COMMISSION**

The City of Appleton Plan Commission will conduct an Informal Public Hearing on Tuesday, August 21, 2018, at 4:00 P.M., in Common Council Chambers, 6th Floor, City Hall, 100 North Appleton Street, or as soon thereafter as can be heard, for the following proposed rezoning request:

**Rezoning Request & Location:** The City of Appleton Plan Commission initiated this rezoning to rezone the Apple Ridge Annexation Area, located at the southeast corner of N. Ballard Road and E. Apple Creek Road, from temporary AG Agricultural District to R-1B Single-Family District. The R-1B Single-Family District is intended to provide for and maintain residential areas characterized predominately by single-family, detached dwellings on medium sized lots while protecting residential neighborhoods from the intrusion of incompatible non-residential uses.

**Purpose of the Rezoning:** Assign permanent zoning classification to a newly annexed property.

**Aldermanic District:** 13 – Alderperson Kyle Lobner

You are being notified as a policy of the City of Appleton Community and Economic Development Department. This notification invites you to appear before the Appleton City Plan Commission, and you will be given an opportunity to express your views or concerns regarding the above-described request. You may also address the City Plan Commission by letter at the address below. The City Plan Commission makes a recommendation to the Common Council who makes the final decision on the matter.

Any questions regarding this matter should be directed to Don Harp, Principal Planner, in the Community and Economic Development Department at 920-832-6466.

CITY PLAN COMMISSION

COMMUNITY & ECONOMIC DEVELOPMENT  
CITY HALL - 100 NORTH APPLETON STREET  
APPLETON, WISCONSIN 54911-4799  
920-832-6468

*Reasonable accommodations for persons with disabilities will be made upon request and if feasible.*

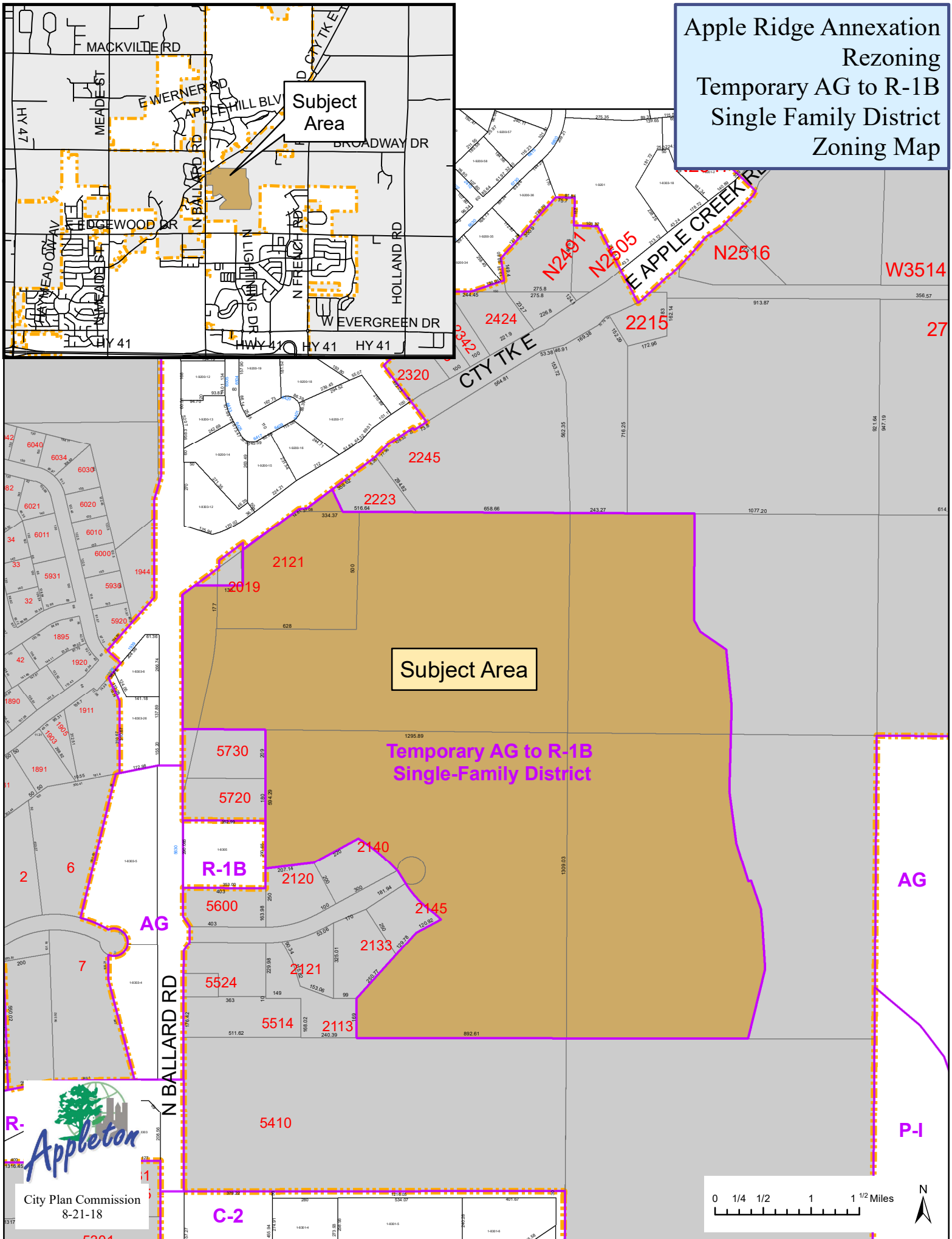


Apple Ridge Annexation  
Rezoning  
Temporary AG to R-1B Single Family District  
Aerial Map





Apple Ridge Annexation  
Rezoning  
Temporary AG to R-1B  
Single Family District  
Zoning Map





## REPORT TO CITY PLAN COMMISSION

**Plan Commission Informal Hearing Meeting:** August 21, 2018

**Common Council Public Hearing Meeting:** September 19, 2018

**Item:** Rezoning #9-18 – Apple Ridge Annexation

**Prepared By:** Don Harp

### GENERAL INFORMATION

**Owners:** Goodness Grace, LLC c/o Jerome R. Koleske, Manager; Otto and Mary Ann Reetz; and M & J Weyenberg Properties, LLC c/o Gerald and Mary Ann Weyenberg, Members

**Rezoning Initiated By:** Appleton City Plan Commission

**Tax Id Numbers:**

Town #10-1-1567-00 (all) = City #31-1-8307-00

Town #10-1-1567-01 (all) = City #31-1-8307-01

Town #10-1-1561-00 (part) = City #31-1-8307-02

Town #10-1-1569-00 (part) = City #31-1-8307-03

Town #10-1-1570-00 (part) = City #31-1-8307-04

Town #10-1-1571-08 (all) = City #31-1-8307-05

**Purpose:** To assign zoning classification to newly annexed property pursuant to Section 23-65(e) of the Zoning Ordinance and Annexation Petition from Temporary AG Agricultural District to R-1B Single-Family District.

### BACKGROUND

The subject property was included in the Apple Ridge Annexation that was approved by the Plan Commission on August 7, 2018 and by the Common Council on August 15, 2018. The subject property was officially annexed to the City on August 21, 2018 at 12:01 a.m.

The subject property was annexed to the City with a Temporary AG Agricultural District zoning classification. The Plan Commission initiated the process to rezone the subject property from Temporary AG Agricultural District to R-1B Single-Family District at the August 7, 2018 meeting.

## **STAFF ANALYSIS**

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**Standards for Zoning Map Amendments:** Per Section 23-65(d)(3) of the Municipal Code, all recommendations for Official Zoning Map amendments shall be consistent with the adopted plans, goals, and policies of the City and with the intent of the Zoning Ordinance. It would appear the criteria established by Section 23-65(d)(3) Zoning Amendments has been satisfied.

**Proposed Zoning Classification:** The purpose of the R-1B Single-Family Residential District is to provide for and maintain residential areas characterized predominately by single-family, detached dwellings on medium-sized lots while protecting residential neighborhoods from the intrusion of incompatible non-residential uses.

**Existing Conditions:** The subject site to be rezoned is currently undeveloped and zoned Temporary AG Agricultural District.

### **Surrounding Zoning Classification and Current Land Uses:**

**North:** City Zoning: R-1B Single-Family District  
Current Land Use – Single-family residential

Town of Grand Chute Zoning: AGD, General Agricultural District  
Current Land Uses – Residential and Agricultural

**South:** Town of Grand Chute Zoning: AGD, General Agricultural District  
Current Land Uses – Residential and Agricultural

**East:** Town of Grand Chute Zoning: AGD, General Agricultural District  
Current Land Use – Agricultural

**West:** City Zoning: R-1B Single-Family District  
Current Land Use – Single-family residential

Town of Grand Chute Zoning: AGD, General Agricultural District  
Current Land Uses – Residential and Agricultural

**Preliminary Plat:** The Preliminary Plat for Apple Ridge will be presented to the Plan Commission following action taken on Rezoning #9-18. Rezoning #9-18 and the Preliminary Plat for Apple Ridge will be acted on at the same Common Council meeting.

**Special Use Permit:** Review and approval of a Special Use Permit will be needed for the proposed private recreational facility and swimming pool associated with development. The Special Use Permit requires action by Plan Commission and Common Council.

**Appleton Comprehensive Plan 2010-2030:** The City of Appleton 2010-2030 Comprehensive Plan Map identifies the subject site for future Single-Family/Two-Family residential land uses. The proposed R-1B Single-Family District zoning classification is consistent with the *Comprehensive Plan 2010-2030* Future Land Use Map. Listed below are excerpts from the City's Comprehensive Plan 2010-2030.

***Goal 1 – Community Growth (Chapter 10)***

*Appleton will continue to provide opportunities for residential, commercial, and industrial growth, including appropriate redevelopment sites within the downtown and existing neighborhoods, and greenfield development sites at the City's edge.*

***Goal 3 – Housing Quality, Variety, and Affordability (Chapter 5)***

*Appleton will provide a variety of rental and ownership housing choices in a range of prices affordable to community residents, and ensure that existing housing is adequately maintained in terms of physical quality and market viability.*

***5.1 OBJECTIVE:*** *Continue efforts to ensure an adequate supply of housing affordable to all income levels in the community.*

***5.3 OBJECTIVE:*** *Provide a range of housing options that meet the needs and appeal to all segments of the community and allows residents to age in place.*

***OBJECTIVE 10.1 Land Use:***

*Provide an adequate supply of suitable land meeting the demand for development of various land uses.*

**Technical Review Group (TRG) Report:** This item was discussed at the July 17, 2018 Technical Review Group meeting. No negative comments were received from participating departments.

**RECOMMENDATION**

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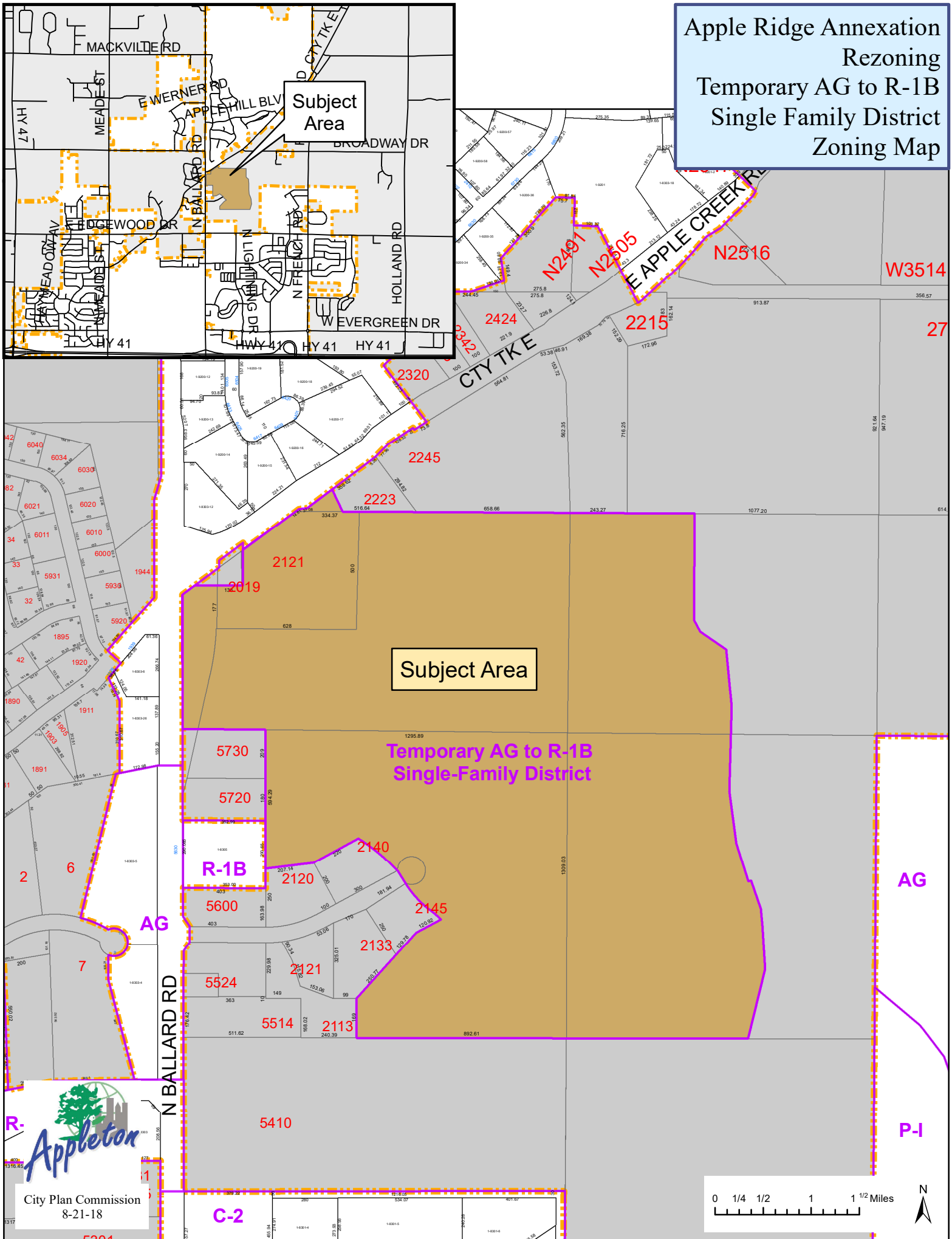
Staff recommends, based upon the standards for map amendments as required by Section 23-65(d)(3) of the Zoning Ordinance, that Rezoning #9-18 to rezone the subject property from Temporary AG Agricultural District to R-1B Single-Family District including to the centerline of existing adjacent right-of-way as shown on the attached maps, **BE APPROVED**.

## REZONING LEGAL DESCRIPTION

Part of the Southwest 1/4 of the Fractional Northwest 1/4; part of the Southeast 1/4 of the Fractional Northwest 1/4; part of Lot 1 CSM 3850 being part of the Northwest 1/4 of the Fractional Northwest 1/4 and all of Lot 2 CSM 3863, located in part of the Northwest 1/4 of the Fractional Southwest 1/4, all located in Section 06, Township 21 North, Range 18 East, CITY OF APPLETON, Outagamie County, Wisconsin, containing 4,314,471 Square Feet (99.1155 Acres) of land described as follows:

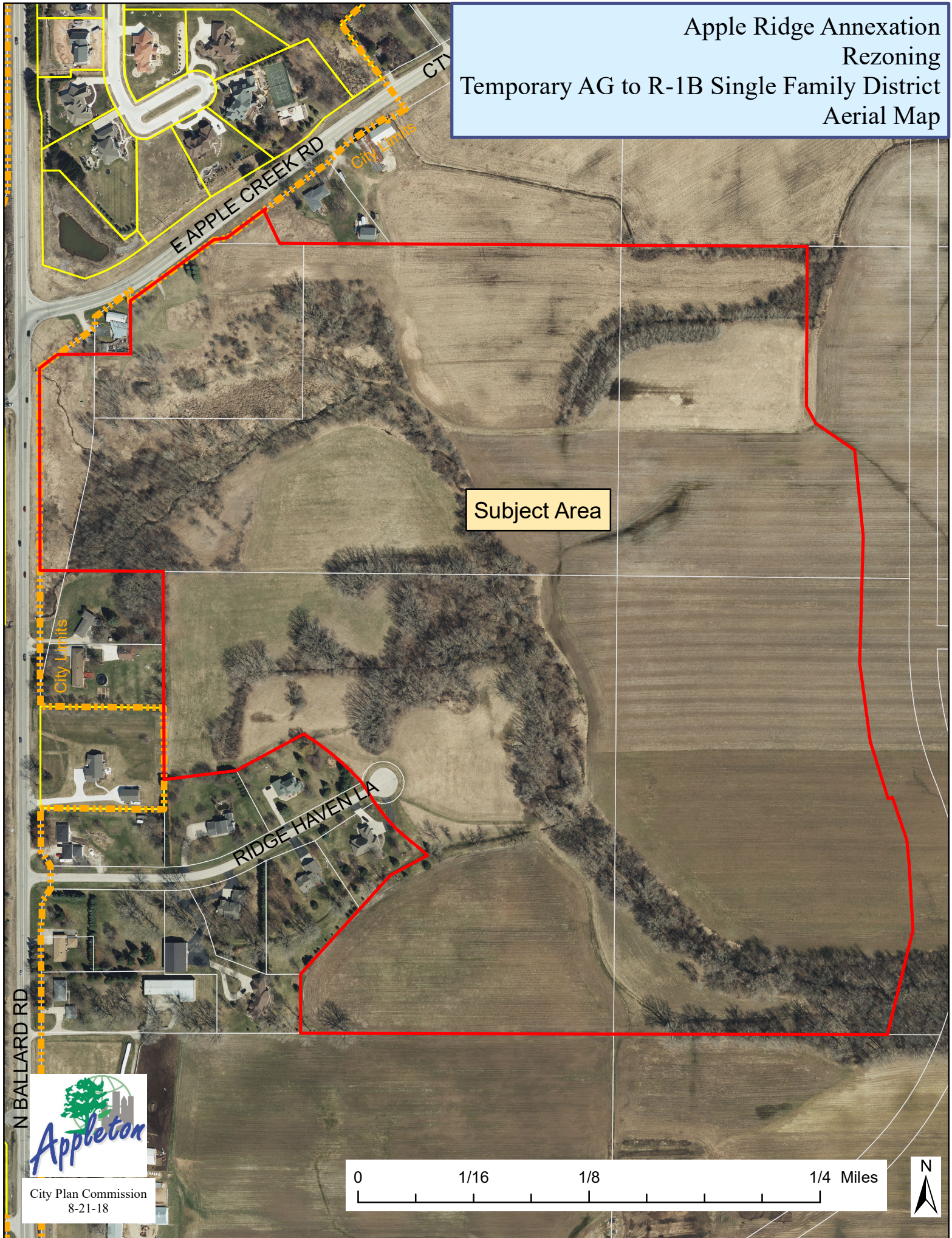
Commencing at the West 1/4 corner of Section 06; thence along the North line of the Fractional Southwest 1/4 of said Section 06, S89°27'19"E, 50.00 feet, thence N00°06'49"W, 577.93 feet; thence N53°43'00"E, 64.40 feet; thence N89°43'17"E, 208.13 feet; thence N00°16'43"W, 152.42 feet to the Southeast right of way of E. Apple Creek Road/CTH E; thence, along said Southeast right of way, N53°55'14"E, 296.03 feet; thence, continuing along said Southeast right of way, N81°23'24"E, 37.00 feet; thence, continuing along said Southeast right of way, N53°15'39"E, 139.50 feet; thence, S27°06'22"W, 10.06 feet; thence S26°03'45"E, 100.16 feet to the South line of Lot 1 CSM 3850; thence, along said South line and the extension thereof, S89°39'43"E, 1507.81 feet; thence S00°20'17"W, 456.72 feet; thence S28°25'33"E, 55.45 feet; thence S55°27'06"E, 135.41 feet; thence S05°33'54"E, 247.09 feet; thence S01°36'33"W, 362.73 feet; thence S07°45'07"E, 225.93 feet; thence S17°26'50"E, 171.00 feet; thence N71°17'21"E, 12.59 feet; thence S18°42'39"E, 128.23 feet; thence S05°31'46"E, 70.52 feet; thence S03°30'35"E, 188.39 feet; thence S13°52'54"W, 307.18 feet to the East/West 1/4 line of said Fractional Southwest 1/4; thence, along said 1/4 line, N89°51'14"W, 1676.30 feet to the Southeast corner of Lot 1 CSM 3359; thence, along the East line of said Lot 1 N00°08'27"W, 168.72 feet to a point on the South line Lot 4 CSM 492; thence, along said South line and the extension thereof; N42°16'25"E, 380.84 feet to a point on the South line of Lot 1 CSM 3863; thence along said South line N61°41'30"E, 121.06 feet to the Southeast corner of Said Lot 1; thence 65.78 feet along the arc of a curve to the left with a radius of 677.00 feet and a chord of 65.75 feet which bears N49°54'04"W; thence 151.14 feet along the arc of a curve to the right with a radius of 433.00 feet and a chord of 150.37 feet which bears N42°41'07"W to the East right of way line of Ridge Haven Lane; thence, along said East right of way line, N32°41'14"W, 66.19 feet to the Southeast corner of Lot 1 of said CSM 492; thence, along the East line of said Lot 1, 216.38 feet along the arc of a curve to the left with a radius of 800.00 feet and a chord of 215.72 feet which bears N50°09'58"W to the Northeast corner of said Lot 1; thence, along the North line of said CSM 492, S61°34'24"W, 219.84 feet to the Northwest corner of said Lot 1 CSM 492; thence, continuing along said North line, S82°55'15"W, 207.57 feet to the Southwest corner of Lot 2 of said CSM 492; thence N00°09'08"W, 594.57 feet to said North line of the Fractional Southwest 1/4; thence along said North line, N89°27'19"W, 316.43 feet to the point of beginning and including to the center line of the public right-of-way.

Apple Ridge Annexation  
Rezoning  
Temporary AG to R-1B  
Single Family District  
Zoning Map





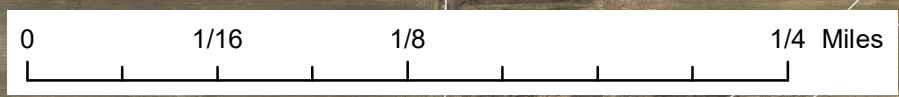
Apple Ridge Annexation  
Rezoning  
Temporary AG to R-1B Single Family District  
Aerial Map



Subject Area



City Plan Commission  
8-21-18







## REPORT TO CITY PLAN COMMISSION

**Plan Commission Meeting Date:** August 21, 2018

**Common Council Meeting Date:** September 19, 2018

**Item:** Preliminary Plat – Apple Ridge

**Prepared By:** Don Harp

### **GENERAL INFORMATION**

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**Owners:** Goodness Grace, LLC c/o Jerome R. Koleske, Manager; Otto and Mary Ann Reetz; and M & J Weyenberg Properties, LLC c/o Gerald and Mary Ann Weyenberg, Members

**Applicant:** Apple Tree - Appleton Four, LLC c/o Jason Mroz

**Consulting Civil Engineer:** Davel Engineering & Environmental, Inc.

**Plat Reviewed Dated/Drafted By:** 7-27-18 and drafted by James R. Sehloff, P.L.S. No. S-2692

**Location:** Southeast corner of North Ballard Road and East Apple Creek Road

**Tax Id Numbers:**

Town #10-1-1567-00 (all) = City #31-1-8307-00

Town #10-1-1567-01 (all) = City #31-1-8307-01

Town #10-1-1561-00 (part) = City #31-1-8307-02

Town #10-1-1569-00 (part) = City #31-1-8307-03

Town #10-1-1570-00 (part) = City #31-1-8307-04

Town #10-1-1571-08 (all) = City #31-1-8307-05

**Petitioner's Request:** The applicant is proposing to subdivide the property for single-family residential development (Phase 1).

### **BACKGROUND**

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The subject property was included in the Apple Ridge Annexation that was approved by the Plan Commission on August 7, 2018 and by the Common Council on August 15, 2018. The subject property was officially annexed to the City on August 21, 2018 at 12:01 a.m.

Rezoning #9-18 is also being presented at this August 21, 2018 Plan Commission meeting. Rezoning #9-18 will need to be approved in order for the Preliminary Plat to be approved.

## **STAFF ANALYSIS**

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**Existing Conditions:** The subject lot to be subdivided is currently undeveloped. The area to be platted for single-family residential development totals 59.8577 acres, which will be divided into 79 lots and 6 outlots.

**Zoning Ordinance Review Criteria:** Lot development standards (Section 23-93 R-1B Single-family district of the Municipal Code) are as follows:

- Minimum lot area: Six thousand (6,000) square feet.
  - *The proposed lots range in size from 7,832 square feet to 268,332 square feet. Outlot 1 (785 square feet) and Outlot 3 (921 square feet) do not meet the lot area requirement. All other lots satisfy this requirement.*
- Minimum lot width: Fifty (50) feet.
  - *The typical lot dimensions for the proposed lots are 58 feet X 200 feet. Lot 8 (25 feet) and Outlot 5 (30 feet) do not meet the lot width requirement. All other lots satisfy this requirement.*
- Minimum front, side, and rear yard setbacks: Twenty (20) foot front yard [twenty-five (25) foot minimum on arterial street], Six (6) foot side yard, and Twenty-five (25) foot rear yard.
  - *Required setbacks for buildings and structures will be reviewed through the building permit review process.*
- Maximum building height: Thirty-five (35) feet.
  - *This will be reviewed through the building permit review process.*
- Maximum lot coverage: Fifty percent (50%).
  - *This will be reviewed through the building permit review process.*

**Compliance with the Appleton Subdivision Regulations:** This subdivision complies with the Appleton Subdivision Regulations, except for the following:

- Proposed lot area for Outlot 1 is 785 square feet, minimum 6,000 square feet is required per Section 17-3(c)(6) and Section 23-93(g)(1) of the Municipal Code. The modification allows for a reduction of lot area from 6,000 square feet to 785 square feet. *Note: Per Preliminary Plat Note #8, this outlot will be owned by the Home Owners Association and used for landscaping.*

- Proposed lot area for Outlot 3 is 921 square feet; 6,000 square feet is required per Section 17-3(c)(6) and Section 23-93(g)(1) of the Municipal Code. The modification allows for a reduction of lot area from 6,000 square feet to 921 square feet. *Note: Per Preliminary Plat Note #8, this outlot will be owned by the Home Owners Association and used for landscaping.*
- Proposed Outlot 4 does not abut a dedicated public street in Phase 1 of this development per Section 17-26 (c)(1) of the Municipal Code requires all lots shall abut on a public street or an approved access. The modification allows for a lot not to abut a dedicated public street temporarily, unless a temporary access easement is proposed. *Note: When Phase 2 is platted, this outlot will abut a dedicated public street. Also, per Preliminary Plat Note #1, this outlot will be used for storm water management.*
- Proposed lot width for Outlot 5 is 30 feet, 50 feet is required per Section 17-3(c)(6) and Section 23-93(g)(3) of the Municipal Code. The modification allows for a reduction of lot width from 50 square feet to 30 square feet. *Note: Per Preliminary Plat Note #1, this outlot will be used for storm water management.*
- Proposed lot width for Lot 8 is 25 feet; 50 feet is required per Section 17-3(c)(6) and Section 23-93(g)(3) of the Municipal Code. The modification allows for a reduction of lot width from 50 square feet to 25 square feet on a temporary basis. *Note: When Phase 2 is platted, this lot will satisfy the minimum lot width requirement.*
- Proposed Lot 42 is a double frontage lot. Section 17-26(c)(2) of the Municipal Code states, “Double frontage lots shall not be permitted except as required by the Common Council where they are desirable to provide separation of development from traffic arterials or inharmonious uses, or to overcome disadvantages of topography or situation. A planting screen easement of at least 20 feet, and across which there shall be no right of access, may be required along the line of lots abutting such traffic arteries or other inharmonious use.” *Note: This parcel configuration is necessary to have uniform property lines and avoid unnecessary bend/jogs in the property lines, which lead to ownership confusion in the future. Staff will request a no access restriction note to Harrier Court be placed on the Plat for Lot 42.*

In recognition of the environmental features (floodplain, wetlands, navigable stream, and topography) located on this site and its location with respect to the existing roads and adjacent parcel configurations results in a layout with curvilinear street patterns, stream crossings, narrower lot widths and stormwater management areas. Therefore, per Section 17-3(f) of the Municipal Code, when the Common Council finds that extraordinary hardship or injustice will result from strict compliance with this ordinance, it may vary the terms thereof to the extent deemed necessary and proper to grant relief to the above-referenced items, provided that the modification meets the following three standards:

- (1) The modification is due to physical features of the site or its location. *Yes, staff concludes the existing environmental features located on this site (topography, floodplain, wetlands, navigable stream) and its location with respect to the existing roads connections and parcel lines influence the location and layout of proposed lots, roads, stream crossings and stormwater ponds within the development. These features contribute to challenges of designing Outlots 1, 3, 4, 5, and Lots 8 and 42 in accordance with the applicable requirements of the Zoning and Subdivision Ordinance.*
  - (2) The modification is the least deviation from this ordinance which will mitigate the hardship. *Yes, staff concludes the modifications are minimal deviations and necessary to achieve the residential density shown on the preliminary plat.*
  - (3) The modification is not detrimental to the public interest and is in keeping with the general spirit and intent of this ordinance. *Yes, staff concludes public safety should not be adversely affected by granting the above-referenced modifications for Outlots 1, 3, 4, 5, and Lots 8 and 42.*
- Floodlands. Subdivided lots shall have at least fifty (50) percent of the minimum required lot area (3,000 square feet), based upon the respective zoning district, at least two (2) feet above the elevation of the one hundred (100) year reoccurrence interval flood per Section 17-26(i)(1) of the Subdivision Ordinance. *Note: Lots 8, 11, 12, 23-28, 57-60, 75-79, Outlots 4 and 6 are located in floodfringe areas and will be removed from floodplain by filling per Preliminary Plat Note #6. This requirement and placement of fill will be reviewed and verified through the building permit review process for new home construction on the applicable lots.*
  - Any lot containing slopes of 20% or greater will require compliance with Section(s) 23-26(i)(2) and 23-26(i)(2) a. of the Subdivision Ordinance prior to the issuance of a building permit. The intent of this section is to have slopes of 20% and greater shown on the plat. *Compliance with Section(s) 23-26(i)(2) and 23-26(i)(2) a. will be verified through the building permit review process for new home construction on the applicable lots.*

**Stormwater Regulations:** The Department of Public Works, Engineering Division indicated a Stormwater Permit Application with Stormwater Management Plan has not been submitted for review. Additional Engineering comments that may affect the plat, drainage plan, and sewer/water feasibility plan are anticipated to result from that review process.

**Access and Traffic:** Vehicular access to the subject lots is provided by existing Apple Creek Road (C.T.H. E) and Ridge Haven Lane, which connects to proposed Peregrine Boulevard and Osprey Drive.

**Surrounding Zoning Classification and Current Land Uses:**

**North:** City Zoning: R-1B Single-Family District  
Current Land Use – Single-family residential

Town of Grand Chute Zoning: AGD, General Agricultural District  
Current Land Uses – Residential and Agricultural

**South:** Town of Grand Chute Zoning: AGD, General Agricultural District  
Current Land Uses – Residential and Agricultural

**East:** Town of Grand Chute Zoning: AGD, General Agricultural District  
Current Land Use – Agricultural

**West:** City Zoning: R-1B Single-Family District  
Current Land Use – Single-family residential

Town of Grand Chute Zoning: AGD, General Agricultural District  
Current Land Uses – Residential and Agricultural

**Appleton Comprehensive Plan 2010-2030:** Community and Economic Development staff has reviewed this proposal and determined it is compatible with the One and Two-Family Residential designation shown on the City's *Comprehensive Plan 2010-2030* Future Land Use Map. Listed below are related excerpts from the City's *Comprehensive Plan 2010-2030*.

*Goal 1 – Community Growth*

*Appleton will continue to provide opportunities for residential, commercial, and industrial growth, including appropriate redevelopment sites within the downtown and existing neighborhoods, and greenfield development sites at the City's edge.*

*Goal 3 – Housing Quality, Variety, and Affordability*

*Appleton will provide a variety of rental and ownership housing choices in a range of prices affordable to community residents, and ensure that existing housing is adequately maintained in terms of physical quality and market viability.*

**OBJECTIVE 5.3 Housing and Neighborhoods:**

*Provide a range of housing options that meet the needs and appeal to all segments of the community and allows residents to age in place.*

*Policy 5.3.3 Plan for a supply of developable land suitable for residential development.*

**OBJECTIVE 10.1 Land Use:**

*Provide an adequate supply of suitable land meeting the demand for development of various land uses.*

**OBJECTIVE 10.4 Land Use:**

*Plan for compact, efficient, and fiscally responsible growth of residential, commercial, and industrial development in new neighborhoods in order to implement the principles of smart growth.*

*Policy 10.4.1 Continue to guide residential growth to locations either contiguous to or within presently urbanized areas. As peripheral development occurs, it should be at a compact, urban density to ensure new neighborhoods can be efficiently served by public infrastructure.*

**Technical Review Group Report (TRG):** This item was discussed at the July 17, 2018 Technical Review Group Report meeting.

- Per Engineering Division, a Stormwater Permit application with Stormwater Management Plan (SWMP) pursuant to Chapter 20, Article VI of the Municipal Code is required but has not been submitted for review and approval. Revisions to the plat, drainage plan, and storm sewer design may be required based on that review.

## **RECOMMENDATION**

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The Apple Ridge Preliminary Plat, as shown on the attached maps, **BE APPROVED** subject to the following conditions:

1. The following information is to be provided on the Final Plat:
  - a. A separate exhibit showing 50' Shoreland Zoning Setbacks.
  - b. A separate exhibit showing Wetland Protective Areas.
  - c. A separate exhibit showing Flood Fringe and Floodway, as well as any areas that have been removed from the floodplain via placement of fill.
  - d. On each exhibit, the appropriate line work shall be defined by a metes & bounds description. Each exhibit shall include a statement referencing the corresponding section of the Appleton Municipal Code. The floodplain exhibit shall include a statement that for any structures with basements located within areas removed from the floodplain via fill placement, a Professional Engineer registered in Wisconsin shall submit a statement prior to occupancy that the structure is reasonably safe from flooding, per FEMA Technical Bulletin 10-01, Figure 1.
  - e. Label the meander lines or place in the legend identification for the meander lines.
  - f. Label the watercourse.
  - g. The Public Trust statement shall be included with all Plats that have a navigable stream, revise as necessary.
  - h. The location map does not appear to match the plat limits, revise as necessary.
  - i. Clarify the Easterly limits of Outlot 5, revise line type as necessary.

- j. Outlot 4 does not have public access, revise as necessary or provide a temporary access easement.
  - k. List the outside diameter of iron pipes found.
  - l. Provide an Ordinary High Water Mark (OHWM) Statement. At a minimum, the statement shall provide the source of the determination and if it is approximate. See State Statute 236.025 for additional detail.
  - m. Renumber Lot 619 to Lot 75.
  - n. Add a note indicating there is no access allowed from Harrier Court to Lot 42.
  - o. Add a separate category identifying slopes of 20% and greater to the final plat and add affected lot numbers to Note #5.
- 2. The Stormwater Management Plan and Stormwater Permit Application pursuant to Chapter 20, Article VI shall be submitted to the City of Appleton Engineering Division for review and approval prior to the Final Plat being scheduled for Plan Commission or Common Council approval.
  - 3. Grant all modifications listed in the staff report for Outlots 1, 3, 4, 5, and Lots 8 and 42.
  - 4. The calculation of land area for each lot (pre-filled condition) that is at least two (2) feet above the one hundred (100) year reoccurrence interval flood elevation shall be submitted with the Final Plat materials.
  - 5. Park fees pursuant to the Development Agreement shall be paid to the City of Appleton Finance Department prior to City signatures being affixed to the Final Plat.
  - 6. The Preliminary Plat and Rezoning #9-18 being acted on at the same Common Council meeting.
  - 7. A Development Agreement is required between the City and applicant that identifies the duties and responsibilities with respect to development of the subject land.



Preliminary Plat of  
**Apple Ridge**

Part of the Northwest 1/4 of the Fractional Northwest 1/4; part of Southwest 1/4 of the Fractional Northwest 1/4; part of Southeast 1/4 of the Fractional Northwest 1/4 and part of Lot 2 CSM 3863, located in part of the Northwest 1/4 of the Fractional Southwest 1/4 all located in Section 06, Township 21 North, Range 18 East, City of Appleton, Outagamie County, Wisconsin

**Notes:**

- All Outlots within the boundary of this plat will be owned and maintained by the Apple Ridge Home Owners Association. Outlots 4-6 shall be used for storm water management.
- All elevations shown are NVGD 29, per City Datum.
- Utility and Drainage Easements will be shown on the final plat.
- Outlot 1 and 2 are located along CTH E, there is no access is allowed from said lots onto CTH E.
- Lots 17, 18, and 19 contain severe slopes. The application for a building permit shall be accompanied by a Drainage and Grading Plan, an Erosion Control Plan, a Plot Plan, and a Building Foundation Design Plan prepared by a Licensed Professional Civil Engineer or Structural Engineer registered in the State of Wisconsin, trained and experienced in the practice of geotechnical engineering. The engineer shall provide the design and supervision such that, in the engineer's opinion, the development does not and will not compromise in any way the stability of the soil on site or soil on lands which are adjacent, and will not cause or contribute to such soils becoming susceptible to land slip, land slide, rock fall, mud flow, debris flow, erosion, slumping, settling or other such occurrence.

- Lots 8, 11, 12, 23-28, 57-60, 75-79, OL 4, and OL 6 are located in flood fringe areas to be removed from flood plain by filling. A Wisconsin Professional Engineer shall provide a certification prior to occupancy that the structure is reasonably safe from flooding per FEMA Technical Bulletin 1001 Figure 1.
- Impervious structures/areas may be in wetland protective areas if the impervious area is made to drain away from the wetland.
- Outlots 1 and 3 are to be owned by the HOA and utilized for Landscaping areas.
- Outlot 2, will be owned and maintained by the HOA.

PN: 101156100

Owner  
Otto H & Mary Ann Reetz  
2223 E Apple Creek Road  
Appleton, WI 54913

PN: 101156701, 101156700 & 101156900

Owner  
Goodness Grace LLC  
2611 North Summit Street  
Appleton, WI 54914

PN: 101157108

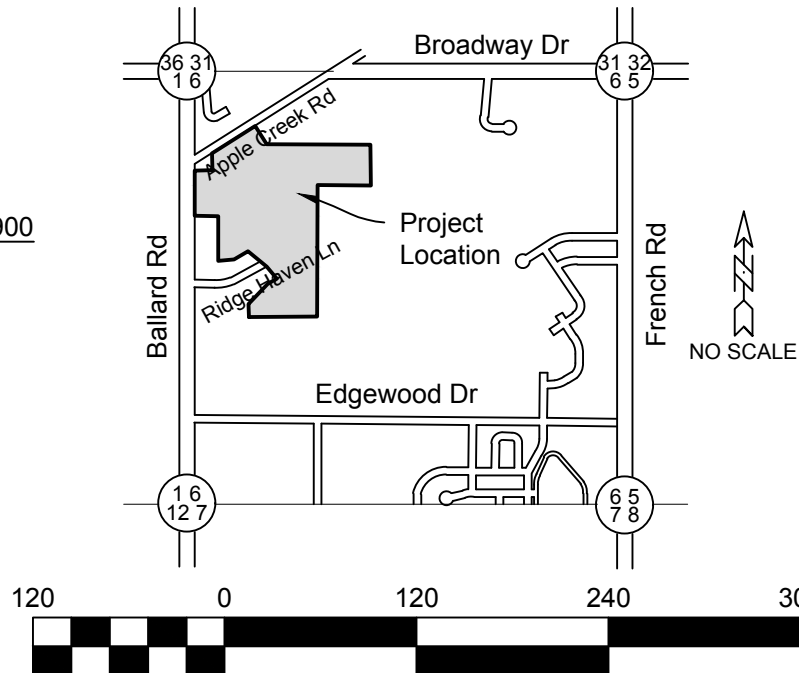
Owner  
M&J Weyenberg Properties LLC  
2113 E. Ridge Haven Lane  
Grand Chute, WI 54914

Developer

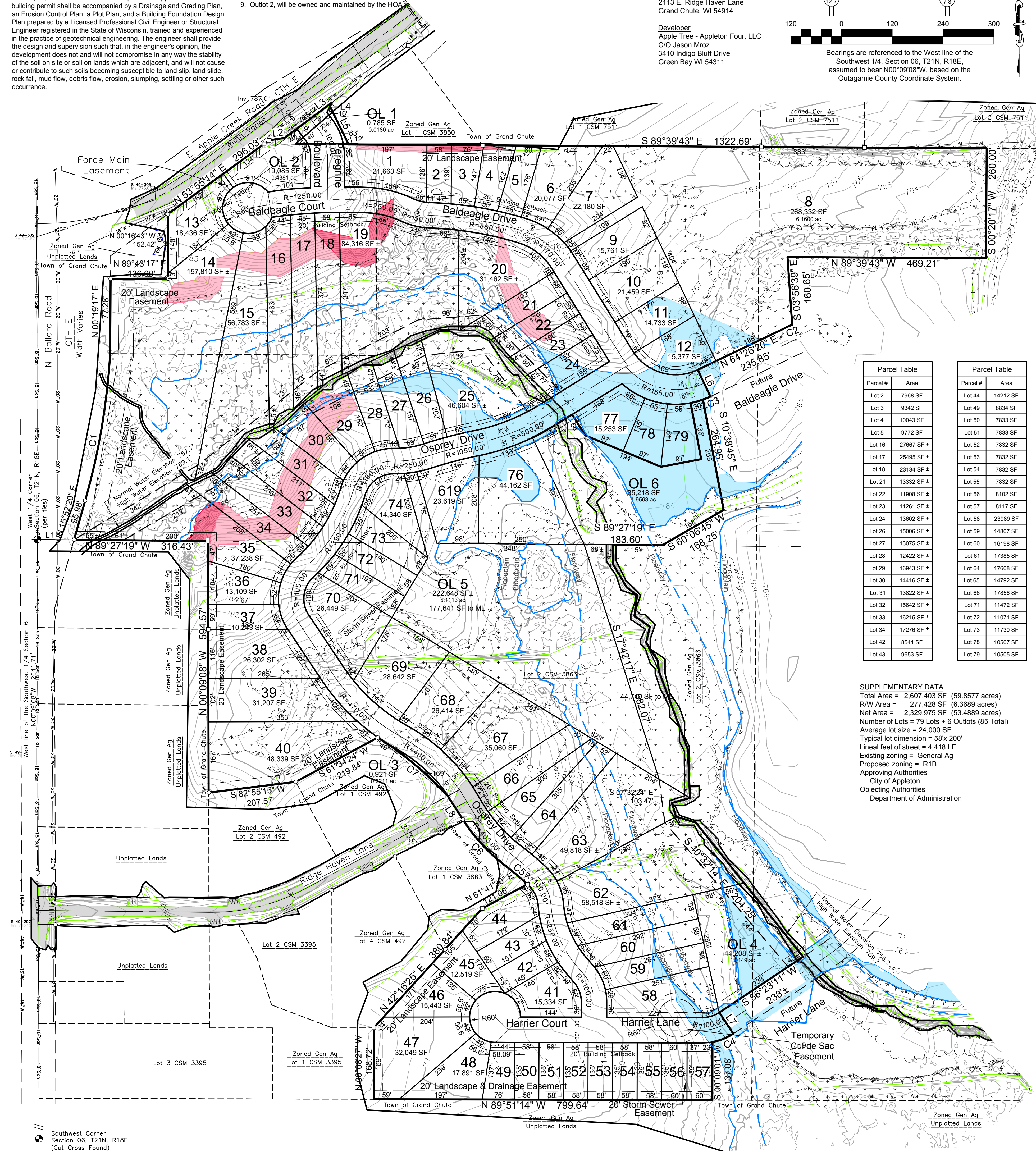
Apple Tree - Appleton Four, LLC  
C/O Jason Mroz  
3410 Indigo Bluff Drive  
Green Bay WI 54311

**LOCATION MAP**

SEC 6, T 21 N, R 18 E,  
OUTAGAMIE COUNTY, WI



Bearings are referenced to the West line of the Southwest 1/4, Section 06, T21N, R18E, assumed to bear N00°09'08\"W, based on the Outagamie County Coordinate System.



Parcel #	Area
Lot 2	7968 SF
Lot 3	9342 SF
Lot 4	10043 SF
Lot 5	9772 SF
Lot 16	27667 SF ±
Lot 17	25495 SF ±
Lot 18	23134 SF ±
Lot 21	13332 SF ±
Lot 22	11908 SF ±
Lot 23	11261 SF ±
Lot 24	13602 SF ±
Lot 26	15006 SF ±
Lot 27	13075 SF ±
Lot 28	12422 SF ±
Lot 29	16943 SF ±
Lot 30	14416 SF ±
Lot 31	13822 SF ±
Lot 32	15642 SF ±
Lot 33	16215 SF ±
Lot 34	17276 SF ±
Lot 42	8541 SF
Lot 43	9653 SF

Parcel #	Area
Lot 44	14212 SF
Lot 49	8834 SF
Lot 50	7833 SF
Lot 51	7833 SF
Lot 52	7832 SF
Lot 53	7832 SF
Lot 54	7832 SF
Lot 55	7832 SF
Lot 56	8102 SF
Lot 57	8117 SF
Lot 58	23989 SF
Lot 59	14807 SF
Lot 60	16198 SF
Lot 61	17385 SF
Lot 64	17608 SF
Lot 65	14792 SF
Lot 66	17856 SF
Lot 71	11472 SF
Lot 72	11071 SF
Lot 73	11730 SF
Lot 78	10507 SF
Lot 79	10505 SF

**SUPPLEMENTARY DATA**

Total Area = 2,607,403 SF (59.8577 acres)  
R/W Area = 277,428 SF (6.3689 acres)  
Net Area = 2,329,975 SF (53.4889 acres)  
Number of Lots = 79 Lots + 6 Outlots (85 Total)  
Average lot size = 24,000 SF  
Typical lot dimension = 58' x 200'  
Lineal feet of street = 4,418 LF  
Existing zoning = General Ag  
Proposed zoning = R1B  
Approving Authorities  
City of Appleton  
Objecting Authorities  
Department of Administration

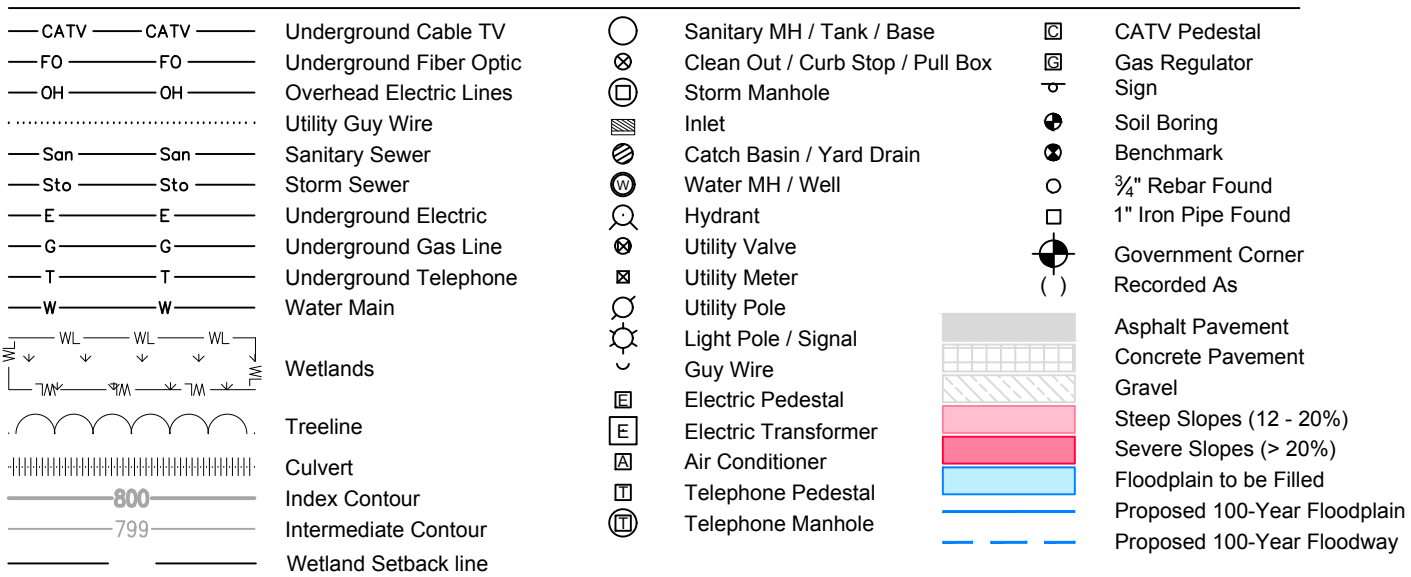
Curve	Radius	Chord Direction	Chord Length	Arc Length	Central Angle	Tangent Bearing-in	Tangent Bearing-out
C1	1628.65'	N 09°39'57\"E	352.14'	352.83'	12°24'45\"	N 15°52'19\"E	N 03°27'35\"E
C2	130.00'	S 66°56'21\"W	11.34'	11.34'	5°00'00\"	S 64°26'20\"W	S 69°26'21\"W
C3	190.00'	N 67°21'15\"E	19.33'	19.33'	5°49'49\"	N 70°16'10\"E	N 64°26'20\"E
C4	130.00'	N 68°09'21\"E	53.03'	53.41'	23°32'22\"	N 79°55'32\"E	N 56°23'11\"E
C5	677.00'	S 49°54'04\"E	65.75'	65.78'	5°34'00\"	S 52°41'04\"E	S 47°07'04\"E
C6	433.00'	S 42°41'06\"E	150.37'	151.14'	19°59'56\"	S 32°41'09\"E	S 52°41'04\"E
C7	800.00'	S 50°09'58\"E	215.72'	216.38'	15°29'48\"	S 57°54'52\"E	S 42°25'04\"E

Line	Bearing	Length
L1	S 89°27'19\"E	86.53'
L2	N 81°23'34\"E	37.00'
L3	N 53°15'39\"E	111.25'
L4	S 27°06'22\"W	10.06'
L5	N 26°03'45\"W	100.16'
L6	S 25°33'40\"E	70.00'
L7	N 33°36'49\"W	60.00'
L8	S 32°41'14\"E	66.19'

**BENCHMARKS** (City of Appleton)

- BM 1 Fire Hydrant, Shoulder (top of cast)  
±72 ft North of Int of Ridge Haven Ln and Ballard  
West Right-of-way of Ballard Road  
(City of Appleton BM# 2801)  
Elev 785.03'
- BM 2 Fire Hydrant, Shoulder (top of cast)  
±145 ft East of Int of Ballard Rd and Apple Creek Rd (CTH E)  
South Right-of-way of Apple Creek Road  
(City of Appleton BM# 2987)  
Elev 781.77'
- BM 3 Fire Hydrant, Shoulder (top of cast)  
±460 ft East/Northeast of BM 2  
Southeast Right-of-way of Apple Creek Road  
(City of Appleton BM# 2986)  
Elev 792.58'
- BM 4 Fire Hydrant, Shoulder (top of cast)  
±710 ft Northeast of BM 3  
Southeast Right-of-way of Apple Creek Road  
(City of Appleton BM# 2984)  
Elev 787.39'

**LEGEND**



**SURVEYOR'S CERTIFICATE**

I, James R. Sehloff, hereby certify that this Preliminary Plat is a correct representation of all existing land divisions and features, and that I have complied with the preliminary plat requirements for the City of Appleton.

James R. Sehloff, P.L.S. No. S-2692

Date



**DAVEL ENGINEERING & ENVIRONMENTAL, INC.**  
CIVIL ENGINEERING CONSULTANTS  
1811 Racine Street Menasha, WI 54952  
Ph: 920-991-1866 Fax: 920-830-9595  
www.davel.pro





## REPORT TO CITY PLAN COMMISSION

**Plan Commission Meeting Date:** August 21, 2018 **\*Critical Timing\***

**Common Council Meeting Date:** September 5, 2018

**Item:** Annual Review of the Business Improvement District (BID) 2019 Operating Plan

**Case Manager:** David Kress

### GENERAL INFORMATION

On behalf of Jennifer Stephany, Executive Director of Appleton Downtown Inc., please find the attached 2019 Business Improvement District (BID) Operating Plan for your review and recommendation.

Staff has reviewed the Operating Plan, and it would appear that there are no BID boundary changes proposed.

Business Improvement Districts (BID) are regulated by Section 66.1109 of the Wisconsin State Statutes. These Statutes require that a BID Operating Plan be reviewed and approved by the local legislative body on an annual basis. The Plan Commission is being asked to review and make recommendation to the Common Council in regard to the submitted 2019 Operating Plan.



**2019**

**Downtown Appleton Business  
Improvement District Operating Plan**



## **Downtown Appleton Business Improvement District Operating Plan 2019**

### **I. Preface**

Wisconsin Act 184, signed into law in 1984, gives Wisconsin municipalities the power to establish business improvement districts (BIDs) within their communities upon petition of at least one property owner within the proposed district. The State Legislature created 66.1109 of the Wisconsin Statutes (the “BID Law”) to provide a mechanism by which business properties within an established district could voluntarily assess themselves to pay for programs aimed at promoting, developing, redeveloping, managing and maintaining the district. In many instances, BIDs are established in downtowns so property owners can jointly attract tenants and increase the value of their properties.

Business improvement district assessments are quite similar to traditional special assessments wherein property owners are assessed for improvements or services that benefit them. Unlike traditional special assessments, however, business improvement district assessments can be used to finance a wide range of activities, services, and improvements. Business improvement districts in Wisconsin have been used to fund a broad scope of activity including business retention and recruitment programs, marketing and promotional activities, environmental enhancement and maintenance programs, and crime prevention and security activities.

Pursuant to the BID Law, this shall be, when adopted, the 2019 Operating Plan for the Downtown Appleton Business Improvement District. This Operating Plan has been prepared by Appleton Downtown Incorporated (ADI).

As used herein, BID shall refer to the business improvement district’s operating and governance mechanism, and “District” shall refer to the property located within the physical boundaries of the business improvement district, as provided herein.

Further development of the District through establishment of the BID is proposed because:

1. The BID law provides a mechanism whereby private property owners can work together in conjunction with the City to develop the district.
2. Existing public funding sources used to maintain and promote the district may not be sufficient. Unified development efforts will have to be financed with new private resources as well as existing public dollars.
3. The District is dynamic, including properties of varying types and sizes. Some form of cost sharing is necessary because it is not feasible for a small group alone or the City of Appleton to support District development efforts. The BID Plan provides a fair and equitable mechanism for cost sharing which will benefit all businesses and properties within the district.
4. Use of the BID mechanism helps to ensure that the entire District will be promoted, programmed and developed as expeditiously as possible.

The property owners advocating the continuation of the BID view it as a method to build on work previously done in the community to improve the downtown. These property owners and the board of directors of Appleton Downtown Inc. have pledged to work cooperatively with other organizations and the City of Appleton to enhance the vibrancy and overall health of downtown Appleton.

This Plan, when adopted by the City Council of the City of Appleton, after public hearing and recommendation of the Plan Commission in the manner required by the BID Law, shall govern the BID for the calendar year of 2017 which shall be the Sixteenth “Plan Year”. However, it is anticipated that the BID shall continue to be so successful that it will be renewed, upon essentially the same terms and conditions for subsequent years, each of which shall be the “Plan Year”. In the manner allowed under Section 66.1109 (3)(b) of the BID Law, although with changes to the budget, work plans and assessment Appendices.

## **II. Plan Development**

This shall be the Business Improvement District Operating Plan for the Downtown Appleton Business Improvement District, for the year 2019.

### **A. Plan of Action**

The Plan of Action Work Plan was developed by the BID and ADI Board of Directors and Standing Committees with approval from the BID and ADI Board of Directors. Those participating in this process were ever conscious of the need to represent the full membership of the BID and of ADI. The following initiatives, strategies identified role and tasks are identified in the Work Plan and align with the City of Appleton Comprehensive plan Chapter 14. (**Appendix A**)

### **B. Goals and Objectives**

The BID seeks to protect public and private investments in downtown Appleton and to attract new investment to the district. The BID exists to promote the orderly development of the district in cooperation with the City of Appleton, including implementation of the Downtown Plan (Chapter 14 of the Comprehensive Plan) and to develop, redevelop, maintain, operate, and promote the District. The BID shall work to preserve and improve economic, cultural, and social conditions within the District by facilitating partnerships of people and organizations to achieve mutual goals. The BID provides the necessary funding to plan, evaluate, facilitate and implement District development projects, planning activities, and promotional activities that fit within the identified mixed-use strategy for developing viable and sustainable markets that the District in downtown Appleton can serve.

### **C. Benefits**

Money collected by the BID under this plan will be spent within the District or for the benefit of the District, and used to help property owners attract and retain tenants, keep downtown clean, safe and attractive, increase the value of property downtown and expand on a strong brand and marketing campaign for downtown. **Appendix A** outlines the initiatives, strategies and tasks for the plan year as they align with Chapter 14 Downtown Plan of the City of Appleton Comprehensive Plan.

#### D. 2017 Annual Report

The 2017 annual report is attached. The total assessed value of properties for the District for 2017 was \$123,013,300 2016 a 1.014% increase over the previous year. The vacancy rate of 18% was calculated based on a total of 227 total BID properties and condo units represents a decrease of one percent over the previous year.

Also included as **Appendix B** is the 2018 Midyear BID/ADI/CDA review summary

#### E. 2019 Budget

All of the estimated expenditures of the BID are shown on **Appendix C**, the Budget. All of the expected expenditures will be financed by the collection of BID assessments and with other revenues generated by Appleton Downtown Incorporated (ADI) and Creative Downtown Appleton Inc. (CDA) including but not limited to sponsorships and donations, ADI memberships, and by revenues of events and promotional activities. Ownership of all activities, programs, promotions, and events, along with any related revenues shall remain with ADI or CDA respectively but shall be applied to programs and services that further goals of the BID.

It is anticipated that the BID will contract with ADI to carry out the BID's Operational Plan, and that the BID will have no paid staff of its own. Funds collected through BID assessments shall be used to pay for this contracted and approved expenditures with ADI, and are expected to pay for about 30 percent of the projected by annual budget to implement a full downtown management program. Additional funds will be raised by ADI from public and private sources to cover the remaining 70 percent, and any other projects not identified herein.

Except as identified herein, all expenditures will be incurred during the Plan Year. Any funds remaining on any line item above may be moved to another budget line item, as determined by the Board of the BID. Any unused funds remaining at the end of the year shall be deposited into a contingency fund for the following Plan Year. If any additional funds are received by the BID, whether from gifts, grants, government programs, or other sources, they shall be expended for the purposes identified herein, and in the manner required by the source of such funds, or, if the funds have no restrictions, in the manner determined by the Board of the BID, in keeping with the objectives of this BID Plan. All physical improvements made with these funds shall be made in the BID District. The location of other expenditures shall be determined by the BID Board, but for the benefit of the District.

#### F. Powers

The BID, and the Board managing the BID shall have all the powers authorized by law, and by this Plan, and shall have all powers necessary or convenient, to implement the Operating Plan, including, but not limited to, the following powers:

1. To manage the affairs of the District.
2. To promote new investment and appreciation in value of existing investments in the District.
3. To contract with Appleton Downtown Incorporated on behalf of the BID to implement the Operational Plan.
4. To develop, advertise and promote the existing and potential benefits of the District.

5. To acquire, improve, lease and sell properties within the District, and otherwise deal in real estate.
6. To undertake on its own account, public improvements and/or to assist in development, underwriting or guaranteeing public improvements within the District.
7. To apply for, accept, and use grants and gifts for these purposes.
8. To elect officers, and contract out work as necessary to carry out these goals.
9. To add to the security of the district.
10. To elect Officers to carry out the day to day work authorized by the BID Board, including signing checks and contracts on behalf of the Board, and to adopt, if the Board wishes, By-Laws governing the conduct of the Board and its Officers, not inconsistent with this Operating Plan.
11. To adopt by-laws related to the day to day operation of the Board and Board meetings.

G. Relationship to Plans for the Orderly Development of the City

Creation of a business improvement district to facilitate District development is consistent with the City of Appleton's Downtown Plan and will promote the orderly development of the City in general and downtown in particular.

H. Public Review Process

The BID Law establishes a specific process for reviewing and approving the proposed Operating Plan, and the boundaries of the proposed District. All statutory requirements to create the BID were followed.

**III. District Boundaries - -- no change has been made to this section from the previous year.**

The District is defined as those tax key parcels, which are outlined in pink and indicated by property in blue on **Appendix G**, attached hereto and incorporated herein by this reference, reflecting the parcels as they existed in the City of Appleton Assessor's records as of September 1, 2001. The District is generally bounded on the south by the south right of way line of Lawrence Street, on the north by the north right of way line of Franklin Street, on the east by the right of way line of Drew Street and on the west by the west right of way line of Richmond Street/Memorial Drive, with additional corridors extending north on Richmond Street to Packard Street and west along college Avenue to Badger Avenue. Properties zoned for commercial use by the City of Appleton Assessor on both sides of boundary streets are included in the District. The District includes 223 contributing parcels and units. Notwithstanding the parcels of property which are not subject to general real estate taxes, shall be excluded from the District by definition, even though they lie within the boundaries of the BID as in the map in **Appendix G**.

**IV. Organization – no change has been made to this section from the previous year.**

## A. Operating Board

The BID Board (“Board”) as defined below, shall be appointed by the Mayor of the City of Appleton, with substantial input from ADI and the property owners in the District. Appointments by the Mayor must be confirmed by the City Council and voted in by the BID Board. The appointments and confirmation shall be made before the commencement of the Plan Year for which the Operating Plan was adopted.

This Board’s primary responsibility shall be to implement the current year’s Operating Plan, to contract for the carrying out of the Operating Plan, contracting for preparation of an annual report and audit on the District, annually considering and making changes to the Operating Plan including suggestions made by Appleton Downtown Incorporated and submitting the Operating Plan for the following Plan Year to the Common Council of the City of Appleton for approval, and other powers granted in this Plan. This requires the Board to negotiate with providers of service and materials to carry out the Plan; to enter into various contracts; to monitor development activity; and to ensure District compliance with provisions of applicable statutes and regulations.

### **The BID Board shall be structured as follows:**

1. Board size maximum of 9
  2. Composition – A majority (at least 5) members shall be owners or occupants of the property within the District. Any non-owner, non-occupant appointee to the Board shall be a resident of the City of Appleton. At least 2 members shall be representative of each of the 3 identified market sectors, service/retail, hospitality, and office. One member shall be a representative of the Mayor or City Council. Any Board member who because of transfer of ownership of property is no longer eligible to act as a representative for a particular sector, or where such transfer of property shall cause the make-up of the Board to fall out of compliance with this Operational Plan shall be replaced. The Board shall make a recommendation for replacement to the Mayor who shall appoint a new Board member within 30 days of the recommendation.
  3. Term – Appointments to the Board shall be for a period of 3 years-for staggered terms, each ending on December 31 of the applicable year. The Board may remove by majority vote, any BID Board member who is absent for more than 3 meetings, without a valid excuse, and may recommend to the Mayor replacement members, which the Mayor shall act upon within 30 days of the recommendation.
  4. Compensation – None.
  5. Meetings – all Meetings of the Board shall be governed by Wisconsin Open Meetings Law. Minutes will be recorded and submitted to the City and the Board. The Board shall adopt rules of order to govern the conduct of its meetings and meet regularly, at least annually.
  6. Record keeping – Files and records of the Board’s affairs shall be kept pursuant to public records requirements.
  7. Staffing – The Board may employ staff and/or contract for staffing services pursuant to this Plan and subsequent modifications thereof. Unless requested otherwise by the Board, and any staff members or employees of contractors may attend all meetings of the Board, but will not have voting authority.
  8. Officers – The Board shall appoint a Chairman, Treasurer and Secretary, any two of the three of which shall have the authority to execute documents on behalf of the full Board, for the purposes authorized by the full Board, including the writing of checks. Attached Board list
- Appendix D**
9. For purposes of this section “person” means an individual owner of a parcel, or a representative of an entity owner of such parcel. No one individual, and no more than one representative of any entity, may hold more than one Board position. If, during the course of a term, a



Board member's situation changes, so that they no longer fit the definition for that seat, such as by selling their parcel, they shall resign within 10 days of selling their parcel.

**B. Amendments**

This Operating Plan, when adopted, shall be the governing plan for the Plan Year. However, section 66.1109 (3) (b) of the BID Law requires the Board of the city to annually review and make changes as appropriate to the district Plan, when adopting a new Operating Plan for later Plan Years. Approval by the City's Common Council of such Plan updates shall be conclusive evidence of compliance of such Plan with the BID Law.

The BID Law allows the BID to annually present amendments to its Plan. The following process for approval of the amended Plan will be followed.

1. A joint strategy session of the BID Board and the ADI Board of Directors will develop the objectives of the Operational Plan for the next Plan Year.
2. The proposed Goals and Objectives for the Plan Year will be drafted by Appleton downtown Incorporated Staff and submitted to the BID Board for review and input.
3. ADI Staff and Board will edit the plan and submit it to the BID Board for approval based on comments by the BID Board.
4. The BID Board will review the proposed BID Plan and submit to Planning Commission for approval.
5. The Common Council will act on the proposed BID Operational Plan for the following Plan Year.
6. The Mayor of Appleton will appoint new members to the BID Board at least 30 days prior to the expiration of outgoing Board members' terms.

It is anticipated that the BID will continue to revise and develop the master Operating Plan for later Plan Years, in response to changing development needs and opportunities in the District, within the purpose and objectives defined herein and therein.

Included in these changes for later Plan years will be changes in the BID budget and assessments.

**V. Finance Method - no change has been made to this section from the previous year.**

The proposed expenditures contained in Section II (D) above, will be financed with moneys collected from the BID assessment, and will be made, from time to time, throughout the year, in accordance with the BID Budget, attached hereto as Appendix C.

Moneys collected from BID assessments by the City will be used to pay Appleton Downtown Incorporated in accordance with the implementation contract between the BID and ADI

**VI. Method of Assessment - no change has been made to this section from the previous year.**

A. Parcels Assessed – **Appendix E**

All tax parcels within the District required to pay real estate taxes, including those taxed by the State as manufacturing, will be assessed with the exception of those parcels used solely for parking and those parcels subject to a recorded condominium declaration, and zoned for commercial use as shown on the City of Appleton Assessors records. Commercial Condominiums shall be assessed as if the entire building in which the Commercial Condominiums are located were not subject to the Condominium act and instead were assessed as one building, and the assessment for that entire building shall be levied against each Commercial Condominium unit in such proportion as the condominium assessments of that condominium are prorated, as defined in the Declaration of Condominium for that building. Real property used exclusively for residential purposes may not be assessed, as required by the BID Law. Property exempt from paying real estate taxes or owned by government agencies will not be assessed.

The Business Improvement District reassessment was completed by the City of Appleton Assessor's Office. The current property assessment list was generated by the Assessor's office and reviewed by the Finance Department and BID Board. As is stated below, the assessment rate of \$2.50 for each \$1000 of assessed value remains for the thirteenth year with no increase recommended. The minimum and maximum also remain with no increase recommended.

B. Levy of Assessments

Special assessments under this Operating Plan are hereby levied, by the adoption of this Operating Plan by the City Council against each tax parcel of property within the District which has a separate tax key number, in the amount shown on the assessment schedule which is attached hereto as **Appendix E**.

The 2018 assessment shown in **Appendix E** was calculated as \$2.50 for each \$1000 of assessed value for each parcel in the District with no parcel assessed more than \$5,000 and no parcel assessed less than \$250, with parcels used solely for parking excluded, with parcels solely used for residences excluded, and with the adjustments for the Commercial Condominiums and adjustments for relocation of the caps and minimums. The assessment was based on the assessed value of that parcel (land and improvements) as shown in the records of the City Assessor's Office except as otherwise identified below. It is understood that some properties within the BID may be re-assessed. The changes in the tax assessment may impact the BID assessment for these properties.

The principal behind the assessment methodology is that each non-exempt parcel's owner should pay for District development in proportion to the benefit derived. Obviously, not every parcel in the District will benefit equally, nor should each parcel, regardless of size or value contribute in exact ration of property value. It is assumed that a minimum and maximum benefit can be achieved for each parcel, thus, minimum and maximum BID assessments have been established.

For those parcels identified as Commercial Condominiums, the minimum and maximum assessments shall be established for the entire building of which the Commercial Condominium is a part, in the ratios identified above.

C. Schedule of Assessments

The final form of this 2019 Operating Plan has attached as **Appendix E** are schedules of all the tax key numbers within the BID which are being assessed, and their assessment using this formula.

**The 2018 BID assessment total is anticipated to be \$198,468**

**Assessment adjustments compared to previous year:**

	Property Owner	Address	Adjustment amount	
<b>Removed</b>				
31-2-0384-00	Valley Premier Property LLC	222 Oneida St.	-211,000	(527.50)
<b>Added</b>				
31-2-0144-00	One Lawrence Street LLC	209 S. Allen St.	+807,200	\$ 2018.00
31-2-0333-00	Lawrence University – Seth’s Coffee	323 E. Washington St.	+155,200	\$388.00
31-3-0878-00	Four-M Properties LLC	621 W. Lawrence St.	+124,000	\$310.00
31-2-0343-00	Lawrence University	320 E. College	+ 278,900	\$455.25
<b>Increase</b>				
79 properties experienced an increase				
<b>Decrease</b>				
28 properties experienced a decrease				

D. Assessment Collection and Dispersal

The City of Appleton shall include the special assessment levied herein as a separate line item on the real estate bill for each parcel. The City shall collect such assessments with the taxes as a special assessment, and in the same manner as such taxes, and shall turn over all moneys so collected to the BID Board for distribution in accordance with the BID Plan.

All BID assessments shall be shown on the tax bill as due and owing with the first installment of taxes and shall carry the same penalties and interest if not so paid.

Any money collected by the City of Appleton for BID assessments shall be held by the City in a segregated account.

The City of Appleton Finance Department shall provide to the BID Board by the 15<sup>th</sup> day of each month or as requested a separate financial statement for the BID along with a list of collections and source of such collections identified by tax parcel number for which the amount was collected.

Any BID assessments collected by the City before or after the Plan Year for which the assessments were made shall be held by the city in a segregated account and are to be used by the BID Board in the manner as if received during the applicable Plan Year. This provision is intended to govern BID assessments prepaid in December prior to the applicable Plan Year, as well as to delinquent and late payments made after the Plan Year.

The BID Board shall prepare and make available to the public and the City Council annual reports describing the current status of the BID, including expenditures and revenues, at the time it submits its amended Plan to the City for the following year. Following the end of the fiscal year an independent certified audit shall be obtained by the Board, and which shall be paid for out of the BID Budget. Copies of the 2017 audit are available in the ADI office and a copy was submitted to the Community Development Department with this plan.

Disbursement of BID funds shall be made in accordance with approved BID Operational Plan and Budget. Disbursements for contracted services such as those provided by Appleton Downtown Incorporated shall be done on a reimbursement basis. Invoices and documentation of services performed shall be submitted on a monthly basis to the BID Board. The BID Board shall forward these invoices for payment to the City of Appleton Finance Department. The Finance Department shall issue payment on the invoice once it has received evidence that the expenditures are eligible for reimbursement in accordance with the BID Operational Plan and Budget. This reimbursement shall be made to the service provider within seven business days of the submittal of the request to the City.

The presentation of the proposed Plan to the City shall deem a standing order of the Board under 66.1109 (4) Wis. Stats. To disburse the BID assessments in the manner provided herein. This section shall be sufficient instruction to the City to disburse the BID assessment, without necessity of an additional disbursement agreement, disbursement method, or accounting method. Other than as specified herein, the disbursement procedures shall follow standard City disbursement policy.

#### E. Annual Report

The Board shall prepare an annual report as required by section 66.1109 (3) (c) of the Wisconsin Statutes. A copy of the 2017 report is attached.

The report shall include the required audit. The required audit shall be prepared by the auditing firm conducting the annual audit for the City of Appleton. The BID shall be solely responsible for payment of any funds specified for the BID Audit related to BID activities for said BID Audit.

The City of Appleton Finance Department shall provide an estimate of the cost of said BID audit for the following year to the BID Board no later than September 1 of the previous year.

### **VII. City Role**

The City of Appleton is committed to helping private property owners in the District promote development. To this end, the City intends to play a significant role in the implementation of the Downtown plan. In particular, the City will:

1. Encourage the County and State Governments to support activities of the district.
2. Monitor and when appropriate, apply for outside funds, which could be used in support of the district.
3. Collect assessments and maintain a segregated account.
4. Provide disbursement of BID funds to service providers in accordance with the BID Operational Plan and Budget.
5. Contract with an auditing firm to conduct the Audit. Said firm shall be the same firm that conducts the City of Appleton annual audit.
6. Provide a cost estimate for said audit no later than September 1 for the following year.
7. Provide a separate monthly financial statement to the BID Board.
8. Review annual audits as required per 66.1109 (3) (c) of the BID Law.
9. Provide the BID Board through the Assessor's Office on or before June 1 each Plan Year, with the official City records on assessed value for each tax key number within the District, as of that date in each Plan Year, for purposes of calculating the BID assessment.
10. Adopt this plan in the manner required by the BID Law.
11. Appoint and confirm new BID Board members as required herein.

#### **VIII. Required Statements - no change has been made to this section from the previous year.**

The Business Improvement District Law requires the Plan to include several specific statements.

66.1109 (1) (f) (1.m): The District will contain property used exclusively for manufacturing purpose, as well as properties used in part for manufacturing. These properties will be assessed according to the formula contained herein because it is assumed that they will benefit from development in the District.

66.1109 (5) (a) Property known to be used exclusively for residential purposes may not be assessed, and such properties will be identified as BID exempt properties.

66.1109(1)(f)(5): Michael, Best & Friedrich, LLP has previously opined that the Operating Plan complies with the provisions of Wis Stat. sec. 66.1109(1)(f)(1-4). Michael, Best & Friedrich, LLP has confirmed that, because no substantive changes are proposed in this amendment, no additional opinion is required.

#### **IX. Appleton Downtown Incorporated - no change has been made to this section from the previous year.**

##### **A. Appleton Downtown Incorporated**

The BID shall be a separate entity from Appleton Downtown Incorporated (ADI). ADI shall remain a private not-for-profit organization, not subject to the open meeting law, and not subject to the public records law except for its records generated in connection with its contract with the BID Board, and may, and it is intended, shall contract with the BID to provide services to the BID in accordance with the Plan. Any contracting with ADI to

provide services to BID 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 BID does contract for the construction of improvements or provisions of material, it shall follow the requirements of such statutes to the extent applicable to assure open, competitive procurement of contracts and purchases. Further, the annual accounting required under 66.1109 (3) (c) Wis. Stats. Shall be deemed to fulfill the requirement of 62.15 (14) Wis. Stats. Ownership of assets of Appleton Downtown Incorporated shall remain solely with Appleton Downtown Incorporated.

A. Binding Clause

The adoption of this Operating Plan is subject to the BID Board contracting with Appleton Downtown Incorporated to carry out this Operational Plan, and if such contract is not entered into by the first day of the Plan Year, then the Plan shall be null and void.

**X. Severability and Expansion - no change has been made to this section from the previous year.**

The Business Improvement District has been created under authority of 66.1109 of the Statutes of the State of Wisconsin.

Should any court find any portion of the BID Law or this Plan invalid or unconstitutional, said decision will not invalidate or terminate the Business Improvement District and this Business Improvement District Operating Plan should be amended by the Common Council of the City of Appleton as and when it conducts its annual budget approval and without necessity to undertake any other act.

All of the above is specifically authorized under 66.1109 (3) (b) of the BID Law.

If it is determined by a court or administrative body that the parcel of property not be subject to general real estate taxes may not be included within the District, then said parcels shall be excluded from the definition of the district.

All appendices are hereby incorporated by this reference.

# **APPENDIX A**

## **2019 Plan of Action**

# **APPLETON DOWNTOWN INC., BUSINESS IMPROVEMENT DISTRICT and CREATIVE DOWNTOWN APPLETON INC. 2019 Plan of Action**

## **Mission**

Our mission to establish a vibrant and accessible destination for business, learning, living and leisure is anchored in our focus to create an environment of success and sustainability for the new exhibition center, a robust employment center and a more livable Downtown. Our strategic initiatives build support for an exceptional visitor experience, a strong business climate and an attractive, accessible and inclusive downtown where more people want to live.

## **OUR BRIGHT FUTURE**

As the City, ADI and its partners continue to plan and invest in downtown Appleton, they will be guided by the following vision and principles: “Downtown Appleton is a great American urban neighborhood and employment center with world class arts and entertainment.”

1. Fully embrace and leverage the diverse arts, cultural, and educational assets of the community
2. Invest in the growth of downtown neighborhoods with diverse housing options and residential amenities
3. Increase connectivity, trails, and recreation opportunities between the downtown, the Fox River, and the region
4. Foster a culture of walking and biking
5. Promote quality development along the Fox River by embracing the region’s industrial and natural heritage
6. Support diverse partnerships which make downtown more attractive for residents and visitors through: activities and events; public art and place making; on-going maintenance; and promotion and marketing
7. Create a safe, welcoming, inclusive and accessible downtown
8. Grow downtown as an employment center for the region
9. Continue to support events and entertainment which draw visitors to downtown Appleton
10. Support a destination Fox Cities Exhibition Center as a unique attraction and community asset
11. Support unique, independent businesses

## **MARKET FINDINGS**

The recently adopted Appleton Downtown Market Analysis identifies the following key assets and subsequent development and community priorities that reflect the public input and discussion throughout the plan development.

## **Key Assets**

1. Large daytime workforce
2. A thriving arts/entertainment/culture/educational scene
3. The Fox River, an extensive parks system, and growing trail network



4. Diverse events and programs draw thousands of visitors
5. Strong business mix
6. College Avenue, which is walkable and economically vibrant

#### **Development Priorities**

- Residential Development - A mix of multifamily, townhouse, and condo housing into downtown, with a focus north of College Avenue.
- Office Development - New office downtown, including north of College Avenue.
- Hospitality - Few deficiencies exist, more restaurants.
- Retail/Commercial - Focus on strategically filling existing spaces.
- City Center Plaza/Public Market - Explore public market concept.

#### **Community Priorities**

- Successful Operation of the Fox Cities Exhibition Center
- Balanced Riverfront revitalization
- New or remodeled Appleton Public Library
- Develop Ellen Kort Peace Park & redevelop Jones Park
- A walkable Downtown
- Strong livable Downtown neighborhoods
- Traffic flow Improvements
- Accessible and affordable parking solutions
- Enhanced streetscapes throughout Downtown
- Expand Public Art & Creative Culture
- Continued Partnership with Lawrence University

#### **Key Accomplishments from the Past Year**

Over the last 12 months our organization has experienced significant progress through several key initiatives and new projects including:

- Economic Development support including our involvement on the Library planning Core team and promoting the new TIF Districts 11 and 12 and the supporting grant programs. Distribution of support pieces including the downtown lifestyle and market study summary pieces. A state of the Downtown event was again hosted in cooperation with the City of Appleton to share information on the new TIF districts, PACE funding, Historic Tax Credits and residential mixed use development interest.
- Riverfront Spaces and Places plan in process in cooperation with East Central Wisconsin Regional Planning Commission to create an activation plan to identify opportunities to enhance the walkability of the riverfront and connectivity to downtown. Such a plan may include beautification elements, wayfinding signage, lighting or other placemaking enhancements to the area. This plan will help support a Riverfront BID creation process.
- Expansion of the Downtown CARE (Clean.Assess.Refresh.Enhance) Program in cooperation with Riverview Gardens and the City of Appleton with the addition of 10 hours a week of contracted cleaning with the Gumbuster with the Service Works program. The CARE program is

designed to provide employability skills to those experiencing homelessness or other barriers to employment while providing general cleaning service to the public areas of the Downtown district.

- Contributions to the Creative Environment included our partnership on the Acre of Art sculpture project which will place additional sculptures for a two year period. The program will be an annual project to allow for rotating pieces and acquisition of a piece every two years. Support and coordination for the completion of the Neenah Papers mural which will enhance the trail experience along the river. Our partnership on Mile of Music, additional steps in our pet friendly campaign, little libraries and continuing to enhance the public space areas with interactive games and activities like Creative Kids program, live music and public art.
- Embracing and supporting the Appleton Dignity and Respect campaign brings important discussion and initiatives to Downtown to become a more inclusive and welcoming community. Downtown is a place where everyone needs to feel a safe sense of belonging and opportunities for success are supported equally.

### **The State of Downtown Appleton**

The state of Downtown Appleton is strong. Across the nation there is a trend toward urban living amidst vibrant cultural districts. People, especially those without children, are desiring convenient, car-optional neighborhoods where residents can walk to work, shop and access entertainment. Downtown Appleton has benefited from this trend and the ADI and BID boards are optimistic that we are emerging as a destination for urban living.

Downtown Appleton has become the central social district in the area. ADI sponsored programs such as the Saturday Farm Market and Thursday concerts continue to grow in popularity. Special events such as the Mile of Music and Octoberfest are attended by tens of thousands of people. With the Exhibition Center now open, Downtown Appleton is poised to see even greater growth in visitors.

The employer base in Downtown Appleton is thriving and demand for office space has increased of late. Opportunities exist to further engage workers to take advantage of what Downtown Appleton has to offer. The market study indicates leakage in grocery and more opportunity for experiential and specialty retail. As big box retailers are struggling and closing around the country, Downtown's are positioned to welcome independent retailers and smaller scale national retail service centers in active walkable urban corridors.

Downtown Appleton enjoys many assets, and the opportunity to better leverage these assets is exciting: a riverfront district that is growing in popularity; a highly regarded university that brings world-class entertainment to Downtown Appleton; and historic buildings that are the core of good urban design.

Statistics indicate that Appleton is one of the safest cities in the country. However, as more people come downtown there are more security incidents and a concern about the safety of downtown. More crowds also make it challenging to keep our downtown clean. Today, downtown cleanliness is of utmost importance. Increasing the accountability of the CARE program is expected to improve downtown cleanliness, but we need to do more and ensure that we have a long term solution in place for continued financial support and growth.

The City of Appleton Dignity and Respect campaign continues to foster strong collaboration in our community's efforts to become for inclusive and welcome. ADI has much to learn and our goal for this year is to better understand how we can make positive improvements. We look forward to our participation in the campaign and the creation of a Downtown Dignity and Respect video in cooperation with the City's Diversity and Inclusion Director. Our goal is a downtown where ALL people feel safe and welcome.

Our work to create One Great Place is also about talent attraction. As the premier arts and entertainment district of the Fox Cities, downtown is a quality of life benefit highlighted by employers throughout the region to attract and retain a talented workforce. Employees are more often making a decision on job selection based on community and quality of life. By adopting a creative placemaking approach to activating public spaces, recruiting a healthy business mix and integrating public art, we position downtown for employment growth and increased residential capacity.

### **Forward**

For the next year, the ADI and BID boards will continue to advance the three imperatives for advancing ADI's Mission:

1. Advance downtown living to increase the number of downtown residents and the economic diversity of those residents
2. Play a more integrated role in business recruitment and retention efforts in partnership with Downtown property owners
3. Curate walkability and livability enhancements throughout the Riverfront corridor and the West end of College Ave.

The Chapter 14 Downtown Plan will be implemented through seven initiatives and their associated strategies. The BID/ADI/CDA Plan aligns its work plan within the following initiatives and strategies.

## 2019 WORK PLAN

The following plan integrates Appleton Downtown Inc., Creative Downtown Appleton Inc. and the Business Improvement District. This work plan is aligned with the Initiatives and Strategies from Chapter 14 of the City of Appleton 2017 Comprehensive Plan – the Downtown chapter.

- **Major Partner** – ADI/BID/CDA is a primary partner, organizer, and contributor.
- **Contributor** – Another stakeholder owns this initiative, but ADI/BID/CDA will have significant execution responsibilities.
- **Support and Promote** – Another stakeholder owns this initiative and there is no apparent ADI/BID/CDA work effort, but ADI/BID/CDA leadership will help promote the effort and be present at key times to help explain how the initiative impacts or benefits downtown and ADI/BID/CDA.

Initiatives	Strategies	ADI/BID/CD A Role	DRAFT: 2019 Work Plan	BID Funded	2019	Thru 2020
#1 Urban Form & Design	1.1 Continue development of entry features on major routes into the downtown	Major Partner	Entry Signage for Downtown <ul style="list-style-type: none"> <li>• Maintain and program the Message Center on the Red Ramp</li> <li>• Continue to work on entry signage plan for main routes into downtown.</li> </ul>		X	X
	1.2 Continue to enhance the civic campus south of Lawrence Street	Support and Promote				
	1.3 Implement appropriate streetscaping projects throughout the downtown	Contributor	<ul style="list-style-type: none"> <li>• Develop a vision plan for streetscape enhancements for the next three years.</li> <li>• Continue to fund the flowers in the planters along College Ave.</li> <li>• Partner with DPW on sidewalk kiosk updates</li> </ul>	X	X X	X X
	1.4 Install sculpture, murals, and other art in public locations throughout the downtown	Major Partner	<ul style="list-style-type: none"> <li>• Be a partner on the Acre of Art program to support annual temporary sculptures.</li> <li>• Promote and curate additional interactive public art in the district.</li> <li>• Establish a Quarterly City Public Art Committee meeting with Creative Downtown Appleton (CDA)</li> </ul>		X X	X

Initiatives	Strategies	ADI/BID/CD A Role	DRAFT: 2019 Work Plan	BID Funded	2019	Thru 2020
#1 Urban Form & Design	1.5 Continue to encourage quality urban design throughout the downtown through voluntary measures	Contributor	<ul style="list-style-type: none"> <li>Continue to offer the Façade Grant program for exterior building and access improvements.</li> <li>Identify opportunities to enhance the grant program through matching support from vendors or other local partners.</li> <li>Create a set of façade standards to include with the grant and share with all buildings within the CBD.</li> </ul>	X	X  X	X   X
	1.6 Add flexible outdoor space throughout the downtown area	Major Partner	<ul style="list-style-type: none"> <li>Focus on adding seating options on the West end and riverfront</li> <li>Draft a proposal and budget for a seasonal parklet option for the west end.</li> </ul>		X	X
#2 Tourism, Arts, Entertainment & Education	2.1 Maintain and strengthen the vitality of the arts and entertainment niche	Major Partner	<ul style="list-style-type: none"> <li>W/partners: Conduct an inventory of public art downtown and riverfront and identify gaps and potential future public art locations.</li> <li>Continue to host 100+ events annually.</li> <li>Continue to partner with Mile of Music and Octoberfest on event coordination.</li> <li>Recruit and support an organization to own and manage a monthly night market on College Ave – preferably on the West end</li> <li>Host monthly hospitality committee and creative committee meetings</li> </ul>	X	X X X X	X X
	2.2 Pursue opportunities to attract more artists and arts related businesses to the downtown	Contributor	<ul style="list-style-type: none"> <li>Provide exhibit and sales opportunities for local artisans.</li> <li>Music movement partner with Mile of Music to become a more musician friendly city</li> </ul>			X

Initiatives	Strategies	ADI/BID/CD A Role	DRAFT: 2019 Work Plan	BID Funded	2019	Thru 2020
#2 Tourism, Arts, Entertainment & Education	2.3 Create new venues for arts and entertainment activities in the downtown	Contributor	<ul style="list-style-type: none"> <li>• Pop up gallery support and promote the “how to” guide available soon on our website</li> <li>• Explore underutilized space on the west end and riverfront for arts related activities or events: ie Thompson Center parking lot</li> <li>• Music Movement support to venues – more collaborative promotion for live music, create a secret shopper type program with musicians to provide free venue audits</li> </ul>		X	
	2.4 Continue to support the Fox Cities Exhibition Center as a vital component of the downtown	Contributor	<ul style="list-style-type: none"> <li>• Assist the Convention and Visitors Bureau (CVB) and Red Lion with convention and event attraction.</li> <li>• One Great Place for your convention promotion video.</li> <li>• Grow the Ambassador program focused on connecting convention visitors to the downtown businesses &amp; attractions.</li> </ul>	X	X	X
	2.5 Foster an arts education focus downtown	Support and Promote	<ul style="list-style-type: none"> <li>• W/partners grow Creative Kids program with Art on the Town</li> <li>• Fund free to the public arts workshops with local artists during Art on The Town - CDA</li> </ul>	X	X	
	2.6 Create more Fox River to Downtown tourism opportunities and connections	Contributor	<ul style="list-style-type: none"> <li>• Include riverfront messaging and wayfinding in marketing and promotions.</li> <li>• Continue to fund 40% of the trolley service for Thursday night, Friday night and all-day Saturday.</li> <li>• Create a new promo video: Explore Downtown’s backyard -The Fox Riverfront! Highlight: outdoor dining, tour boat, kayak and bike rentals, live music, bird watching,</li> </ul>		X	X

Initiatives	Strategies	ADI/BID/CD A Role	DRAFT: 2019 Work Plan	BID Funded	2019	Thru 2020
#2 Tourism, Arts, Entertainment & Education	2.7 Support creation of a new or remodeled library downtown, which will significantly contribute to the arts and culture of downtown Appleton	Support and Promote	<ul style="list-style-type: none"> <li>Continue to be an advocate for a new library in Downtown Appleton</li> <li>Provide communication to our members about library developments</li> </ul>			
	2.8 Establish an Arts and Culture Plan for the City	Contributor	<ul style="list-style-type: none"> <li>Collaborate with City Public Art Committee</li> <li>Establish a public art inventory database and map</li> <li>Submit public art project ideas to the committee annually for consideration</li> <li>Provide opportunities for multicultural inclusion in events and public art projects</li> </ul>		X X  X	X
#3 Neighborhood & Residential Development	3.1 Encourage mixed-use and mid-density residential redevelopment on under-utilized sites on the edge of downtown	Contributor	<ul style="list-style-type: none"> <li>Continue to support second floor façade building improvements in our façade program</li> <li>Host an Annual Downtown Summit</li> <li>Partner with the Home Builders Association, and Downtown residential spaces to feature a Downtown Living Tour</li> </ul>	X	X  X X	X
	3.2 Preserve and enhance historic neighborhoods adjacent to downtown	Support and Promote				

Initiatives	Strategies	ADI/BID/CD A Role	DRAFT: 2019 Work Plan	BID Funded	2019	Thru 2020
#3 Neighborhood & Residential Development	3.3 Promote development of neighborhood serving businesses to meet the basic shopping and service needs of downtown and nearby residents	Major Partner	<ul style="list-style-type: none"> <li>Annual Downtown resident survey</li> <li>Host a Downtown resident night at a concert series and offer free wristband and drink ticket to all Downtown Residents for completing a survey</li> <li>Create a Welcome to Downtown residential packet – Guide, welcome message, discount coupons from businesses, survey to provide feedback to us.</li> <li>Continue efforts to make downtown pet-friendly: waste stations, leash hooks, and a downtown dog park.</li> <li>Assemble a bike share program proposal with smart bikes as Lime Bikes</li> </ul>		X X  X  X X	X   X
	3.4 Evaluate the need to amend the Zoning Code and other tools to facilitate redevelopment in mixed-use areas bordering the downtown CBD	Support and Promote				
	3.5 As future housing is added downtown, coordinate efforts with the Appleton Area School District (AASD)	Support and Promote				
	3.6 Enhance the image of downtown north of College Avenue	Contributor	<ul style="list-style-type: none"> <li>Host monthly Washington Square committee monitor and track daily reports, manage security contract</li> <li>Microtarget spaces that are not safe, comfortable, or interesting for improvement. Partner with area residents, business and churches for quick, inexpensive improvements.</li> </ul>		X  X	X



Initiatives	Strategies	ADI/BID/CD A Role	DRAFT: 2019 Work Plan	BID Funded	2019	Thru 2020
	3.7 Support green energy and sustainable infrastructure development	Support and Promote	<ul style="list-style-type: none"> <li>Research solar powered charging stations for Houdini Plaza and the parklet</li> </ul>		X	X X
	3.8 Promote a broad spectrum of housing types within the downtown study area	Contributor	<ul style="list-style-type: none"> <li>Partner with the Home Builders Association and Downtown residential spaces to feature a Downtown Living Tour night as part of Art on the Town or other event</li> </ul>		X	
	3.9 Fund and implement a “Quiet Zone”	Support and Promote			X	
	3.10 Promote well-designed transitional areas between higher density development downtown and adjacent, largely single family neighborhoods	Support and Promote				
#4 Downtown Development & Business Retention	4.1 Sustain and grow the retail niches which have formed downtown	Major Partner	<ul style="list-style-type: none"> <li>Continue to offer business Recruitment grant program</li> <li>Administer a business retention survey</li> <li>Continue to offer marketing grant program</li> <li>Increase brand and image marketing to highlight our retail nodes</li> <li>Support a new Shop Appleton Campaign and Retail promotion and events in cooperation with ANBA</li> <li>Recruit and promote retail pop up shops in vacant store fronts</li> </ul>	X  X X  X	X X X X  X	X X X X  X
	4.2 Identify and aggressively recruit target industries	Major Partner	<ul style="list-style-type: none"> <li>Develop vacant property mini-plans to activate storefronts and assist with business recruitment – econ dev committee</li> <li>Request community input on what businesses and amenities would you like to see Downtown: Post Crescent and online campaign</li> <li>Participate in statewide WDAC second location program</li> </ul>	X	X	X

Initiatives	Strategies	ADI/BID/CD A Role	DRAFT: 2019 Work Plan	BID Funded	2019	Thru 2020
#4 Downtown Development & Business Retention	4.3 Protect the existing retail blocks on College Avenue	Major Partner	<ul style="list-style-type: none"> <li>Continue grant programs: business recruitment, façade improvement, marketing</li> <li>Coordinate a business mentorship program for retail and hospitality businesses</li> </ul>	X  X	X  X	X
	4.4 Add depth to retail nodes beyond College Avenue by encouraging new businesses on side streets and fronting Soldier's Square	Major Partner	<ul style="list-style-type: none"> <li>Continue Business recruitment strategies</li> <li>Vacant property plans and promotion</li> </ul> See 4.2	X X	X X	X
	4.5 Facilitate and pursue entrepreneurial business development in the downtown	Contributor	<ul style="list-style-type: none"> <li>Approach entrepreneurial support programs and organizations to partner in the downtown message, offer support and grant program opportunities (gBeta, venture center, WWBIC, LU, kinnecter)</li> <li>Pop up shop support</li> </ul>		X  X	X
	4.6 Create opportunities for smaller offices and business services to locate downtown, including north of College Avenue	Major Partner	<ul style="list-style-type: none"> <li>Continue to host an annual State of the Downtown event</li> <li>Continue façade and recruitment grant programs</li> <li>Create an internal system for tracking available properties</li> </ul>	X  X	X  X	X
	4.7 Maintain an environment favorable to larger employers in the downtown	Major Partner	<ul style="list-style-type: none"> <li>Expand our message about the role downtown and ADI's work plays in talent attraction for the region</li> <li>Annual presentation at SHRM to share the Downtown story</li> <li>Create a Downtown Appleton piece for inclusion in the Relocate Fox Cities packets</li> <li>Create and distribute a New Downtown Employee packet: guide, coupons,</li> <li>Connect into the I41 Corridor Strategies initiative with ECWRPC</li> <li>Connect into New North and encourage inclusion in regional messaging</li> </ul>	   X  X	X X  X X X	X

Initiatives	Strategies	ADI/BID/CD A Role	DRAFT: 2019 Work Plan	BID Funded	2019	Thru 2020
	4.8 Support private sector efforts to redevelop and invest in downtown	Contributor	<ul style="list-style-type: none"> <li>Continue to host an annual State of the Downtown event and actively distribute recruitment and market analysis materials to brokers and developers</li> <li>Continue grant programs: business recruitment and façade improvement,</li> <li>Cooperatively market the City TIF grant program</li> </ul>		X  X	
	4.9 Implement the block level conceptual ideas contained in Section 4 of the full chapter	Support and Promote				
#5 Mobility and Parking	5.1 Support Access Appleton initiatives through the City & BID	Contributor	<ul style="list-style-type: none"> <li>Continue to include accessibility improvements in façade grant criteria.</li> <li>Conduct a Walk Audit of Downtown using the AARP Walk Audit Tool Kit</li> </ul>	X	X  X	X
	5.2 Continue to proactively address real and perceived parking needs as they arise	Support and Promote	<ul style="list-style-type: none"> <li>Participate in discussing, promoting and lobbying for parking solutions</li> <li>Coordinate a parking promotion to highlight the parking App, ramps, variety of meters, best practices etc.. Social, window clings, ads</li> </ul>	X	X  X	X  X
	5.3 Improve pedestrian and bicycle connections to and through the downtown	Contributor	<ul style="list-style-type: none"> <li>Promote walking and biking routes</li> <li>Conduct a Walk Audit and implement enhancement recommendations</li> <li>Work with city on adding bike friendly amenities: ie racks, fix stations, lockers etc..</li> <li>Assemble a bike share program proposal with smart bikes as Lime Bikes</li> </ul>		X  X  X	
	5.4 Implement the recommendations contained in the 2016 Downtown Mobility Plan	Support and Promote	<ul style="list-style-type: none"> <li>Participation in Appleton Street reconstruction project and help communicate to businesses and public</li> </ul>		X	X

Initiatives	Strategies	ADI/BID/CD A Role	DRAFT: 2019 Work Plan	BID Funded	2019	Thru 2020
	5.5 Endorse a system of public transportation centered on downtown	Support and Promote	<ul style="list-style-type: none"> <li>Continue to fund 40% of the trolley service for Thursday night, Friday night and all-day Saturday.</li> <li>Propose option to transit commission to add a second trolley to reduce the route to 15-20 minutes and service all needed stops</li> </ul>		X  X	X
	5.6 Plan, design, and implement bike and pedestrian wayfinding signage	Contributor	<ul style="list-style-type: none"> <li>Design a system of riverfront wayfinding signage to propose with the Riverfront BID</li> </ul>			X
	5.7 Promote downtown development best practices which encourage walkability	Contributor	<ul style="list-style-type: none"> <li>Implement walkability elements to west end and riverfront</li> <li>Continue support for CARE program to keep Downtown clean (see #6)</li> </ul>	X  X	X  X	
#6 Downtown Management	6.1 Update the Downtown Plan as initiatives are completed or new opportunities arise	Support and Promote	<ul style="list-style-type: none"> <li>Continued participation in annual plan reviews</li> </ul>		X	X
	6.2 Uphold support for Appleton Downtown, Inc. and the Business Improvement District	Major Partner	<ul style="list-style-type: none"> <li>Manage cooperative agreement between the BID and ADI</li> <li>Create a more structured internship program to work with high school and college students</li> <li>Grow the new volunteer program to add support for event management, office help and the Ambassador program</li> <li>Develop a plan for adding a riverfront BID part time staff member</li> </ul>	X    X	X X  X X  X	X

Initiatives	Strategies	ADI/BID/CD A Role	DRAFT: 2019 Work Plan	BID Funded	2019	Thru 2020
#6 Downtown Management	6.3 Ensure the cleanliness and safety of the downtown and surrounding neighborhoods	Major Partner	<ul style="list-style-type: none"> <li>Continue support for the CARE program, in partnership with Riverview Gardens and the City of Appleton, to ensure daily clean up of all downtown areas.</li> <li>Work with law enforcement, businesses, and residents to develop a security strategy for side streets and transitional areas between downtown and neighborhoods.</li> <li>Continue to manage the cooperative agreement for a Washington Square security guard</li> <li>Provide diversity training video and group sessions for our members that reflects our aspiration for all cultures and communities of people to feel safe and welcome downtown.</li> </ul>	X   X  X	X  X  X  X	
	6.4 Continue to explore potential for formation of a Riverfront Business Improvement District (BID)	Major Partner	<ul style="list-style-type: none"> <li>Apply the ECWRPC spaces and places plan findings into a Riverfront BID plan.</li> <li>Adoption of riverfront BID in 2019 for budget year 2020</li> </ul>		X	
#7 Public Spaces & Riverfront	7.1 Complete proposed trail segments along the Fox River	Support and Promote	<ul style="list-style-type: none"> <li>Continue involvement in Ellen Kort Park planning and encourage the trail connection to Jones Park</li> </ul>		X	X
	7.2 Construct a grand stair case and similar stair and ramp linkages which connect downtown to the river	Support and Promote				
	7.3 Consider developing a civic plaza on a portion of the YMCA ramp site when it comes down	Support and Promote	<ul style="list-style-type: none"> <li>Continue to participate on the library planning team</li> </ul>			

Initiatives	Strategies	ADI/BID/CD A Role	DRAFT: 2019 Work Plan	BID Funded	2019	Thru 2020
	7.4 Plan, design, and construct improvements to Jones Park and Ellen Kort Peace Park	Contributor	<ul style="list-style-type: none"> <li>Continue involvement in Ellen Kort Park planning and encourage the trail connection to Jones Park</li> </ul>		X	X
	7.5 Continue to support public and private efforts to identify and develop pocket parks, alleyways, and other pedestrian opportunity zones off of College Avenue	Major Partner	<ul style="list-style-type: none"> <li>Propose, fundraise for and implement a parklet on the west end of College Ave.</li> <li>Encourage more sidewalk café seating on the west end of College Ave.</li> </ul>		X X	X
	7.6 Promote the identity of the riverfront through creative use of lighting	Support and Promote	<ul style="list-style-type: none"> <li>Propose LED lighting options as riverfront enhancement</li> </ul>		X	X
	7.7 Support creation of a new or remodeled library downtown providing space for contemplation, creation & collaboration.	Support and Promote	<ul style="list-style-type: none"> <li>Participate in APL planning process and assist with communication with neighboring businesses</li> </ul>		X	
	7.8 Continue both public and private redevelopment along the Fox River Corridor	Major Partner	<ul style="list-style-type: none"> <li>Adoption of riverfront BID in 2019 for budget year 2020</li> </ul>		X	X



# **Appendix B**

## **2018 Midyear Review**

Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
#1 Urban Form & Design	1.1 Continue development of entry features on major routes into the downtown	Major Partner	Entry Signage for Downtown <ul style="list-style-type: none"> <li>Develop an entry signage plan for main routes into downtown.</li> <li>Work with the City and private funding partners to implement entry signage plan.</li> </ul>		X	X	ADI has been offered a free electronic message center from Fox Cities Sign. ADI Board review of an agreement more information needed on replacement costs: \$12,000 and lifespan of the unit – 20 years. Next would be an approach to the City about installing on the Red parking ramp at the corner of Lawrence and Appleton St. Must be sure it is a quality unit with longevity and easy to use.
	1.2 Continue to enhance the civic campus south of Lawrence Street	Support and Promote					
	1.3 Implement appropriate streetscaping projects throughout the downtown	Contributor	<ul style="list-style-type: none"> <li>Develop a vision plan for streetscape improvements for the next three years.</li> <li>Work with the City and private funding partners to implement.</li> <li>Continue to fund the flowers in the planters along College Ave.</li> <li>Re-imagine how to use the College Avenue wayfinding kiosks (e.g., display QR codes for parking app, ADI web site, etc.).</li> </ul>	X	X	X X	Sidewalk kiosk updates – held until library decision is made City: Crosswalks updated this year and Johnston street improvements Flowers are planted Pet friendly station on west end is ready to install  West End walkability round tables forming to explore placemaking amenities and cross promotional opportunities

Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
	1.4 Install sculpture, murals, and other art in public locations throughout the downtown	Major Partner	<ul style="list-style-type: none"> <li>Be a partner on the Acre of Art program to support annual temporary sculptures.</li> <li>Promote and curate additional mural art in the district.</li> </ul>		X	X	<p>Acre of Art 2018 requests have begun. 2 year sculpture rental: \$5000 over 2 years. slow response!!</p> <p>Creative committee has drafted a matrix to evaluate project ideas brought to our committee. 2109 potential projects: west end parklet, riverfront lighting, Acre of Art, another musical instrument</p> <p>Musical Instrument – now working on Plan C – approaching PAC about under their overhang.</p> <p>Neenah Paper wall mural complete. Private donor payment in full. Artist paid in full.</p>
	1.5 Continue to encourage quality urban design throughout the downtown through voluntary measures	Contributor	<ul style="list-style-type: none"> <li>Continue to offer the Façade Grant program for exterior building improvements.</li> <li>Create a set of façade standards to include with the grant and share with all buildings within the CBD.</li> </ul>	X	X	X	<p>Façade grant and TIF grant programs are fully invested for 2018</p> <ul style="list-style-type: none"> <li>OB Brau House: \$5000</li> <li>Lillians: \$1000</li> <li>Player 2: \$1000</li> <li>Scooter G's: \$1000</li> <li>Dr. Jeckyls: \$1000</li> <li>IlAngolo: \$2000</li> <li>Brewed Awakenings: \$2000</li> <li>Red Lion Hotel : \$5000</li> <li>423 W. College Ave: Dealer Inspire: \$5000</li> <li>Spats: \$1000</li> <li>Josef's Gyros: \$1000</li> </ul> <p><b>Total of \$25,000</b></p>

Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
	1.6 Add flexible outdoor space throughout the downtown area	Major Partner	<ul style="list-style-type: none"> <li>Add more seating options to public spaces.</li> </ul>		X	X	Researching a community table placement and cost. Location is our obstacle – another reason to explore perm. Parklets 34 Houdini Plaza plastic chairs placed Applied to AARP grant process for an outdoor seating area under the awning near City Center East.
#2 Tourism, Arts, Entertainment & Education	2.1 Maintain and strengthen the vitality of the arts and entertainment niche	Major Partner	<ul style="list-style-type: none"> <li>Continue to host 100+ events annually.</li> <li>Continue to partner with Mile of Music and Octoberfest on event coordination.</li> <li>Continue to coordinate brand marketing and promotions.</li> </ul>	X	X	X	<p>Farm Market, Annual Meeting, Vacation Destination, Ladies Day, Mini Golf, Craft Beer Walk, Lunchtime Live, Concert Series, Street Music support, Make Music Day support, concert at Heid Music during AOTT.</p> <p>Contracts with Mile and Octoberfest in negotiations</p> <p>Marketing report attached</p>
	2.2 Pursue opportunities to attract more artists and arts related businesses to the downtown	Contributor	<ul style="list-style-type: none"> <li>Provide exhibit and sales opportunities for local artisans.</li> </ul>			X	<p>Art on the Town May – September Farm Market vendor booths Octoberfest Arts and Crafts area managed by ADI</p> <p>Worked with Door County artist on downtown location search</p> <p>Discussion with Avenue art about coming back downtown. Unfortunately, they selected a nonretail location in a business park.</p> <p>New interest in creating a 1000 seat music venue</p>

Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
	2.3 Create new venues for arts and entertainment activities in the downtown	Contributor	<ul style="list-style-type: none"> <li>Create a “How To” guide for pop up shops and galleries to encourage more activity in underutilized or vacant spaces.</li> <li>Pursue sponsors for Jones Park amphitheater</li> </ul>		X		<p>Assisted LU in location for Rabbit Gallery Assisted photographer with pop up location for Mile of Music</p> <p>Working on Pop up How To for Downtown potential location options, temp leases, insurance, rent rates, marketing ideas, event alignment</p> <p>City has informed us they have a potential sponsor for the amphitheater</p>
	2.4 Continue to support the Fox Cities Exhibition Center as a vital component of the downtown	Contributor	<ul style="list-style-type: none"> <li>Assist the Convention and Visitors Bureau (CVB) and the Radisson with convention and event attraction.</li> <li>One Great Place for your convention promotion brochure and video.</li> <li>Implement the Ambassador program focused on connecting convention visitors to the downtown businesses &amp; attractions.</li> </ul>	<p>X</p> <p>X</p>	<p>X</p> <p>X</p> <p>X</p>	<p>X</p> <p>X</p> <p>X</p>	<p>Assisted Kiwanis with Kids Expo planning at FCEC</p> <p>Working with Kinnector to bring their annual event to the FCEC</p> <p>Assisted WAMCI conference on finding a mobile workshop for attendees</p> <p>Tour the CVB staff on downtown updates and new businesses and attractions.</p> <p>Ambassador program first four volunteers are recruited for training. Requesting a list of conference dates, purchase of a tablet and vests. Lisa will lead the Volunteer program internally and work with the Vol Center on recruitment and scheduling</p>

Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
	2.5 Foster an arts education focus downtown	Support and Promote					<p>Fiscal agent for Mile of Music education series</p> <p>Expansion of the Creative Kids program with AOTT YMCA, Building for Kids, APL, Paper Discovery Center,</p> <p>Partner in Make Music Day</p>



Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
	2.6 Create more Fox River to Downtown tourism opportunities and connections	Contributor	<ul style="list-style-type: none"> <li>• Include riverfront messaging and wayfinding in marketing and promotions.</li> <li>• Collaborate with other stakeholders to plan the provision of riverfront amenities (e.g., hot dog carts, and book sharing).</li> <li>• Continue to fund 40% of the trolley service for Thursday night, Friday night and all-day Saturday.</li> <li>• Promote the Fox Trot Trail app and create additional walking and biking routes to further enhance connectivity to the riverfront. Explore mobile apps as a more convenient alternative to paper maps</li> </ul>		X  X  X  X	X  X	<p>Fam tours with downtown businesses on the River tour boat and Riverheath locations</p> <p>ECWRPC Riverfront Spaces and Places Plan sessions in process Scheduling river business visits</p> <p>Trolley relationship continuing</p> <p>We help monitor the Fox Trot trail map container and fill also promoted on our website under Exploring Downtown</p>

Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
	2.7 Support creation of a new or remodeled library downtown, which will significantly contribute to the arts and culture of downtown Appleton	Support and Promote					<p>Invited to participate on the Core Plus team for library planning several 4 to 5 hour sessions are booked with the consultants in addition to the public input sessions. Also recommended that Mark Behnke be invited to participate on the committee</p> <p>Continue to express concerns about parking and access for the 100 E. College tenants south side of the street.</p>
	2.8 Establish an Arts and Culture Plan for the City	Contributor	<ul style="list-style-type: none"> <li>CDA to be a lead partner on the development of an arts and culture plan with the City of Appleton</li> <li>Provide opportunities for multicultural inclusion in events and public art projects</li> </ul>		X X	X	<p>City Public Art Committee moving to application process Once established would like to have Creative Downtown present to the committee and work together.</p> <p>May AOTT has a cultural art focus – will move to August in 2019 Discussion with NEWAA about reaching out to more diverse artists to include in AOTT and other Downtown events Discussion with Indus on developing a cultural program to present annually with Art on the Town.</p> <p>Shared interest with Make Music Day partners to invite cultural groups to participate next year.</p>

Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
#3 Neighborhood & Residential Development	3.1 Encourage mixed-use and mid-density residential redevelopment on under-utilized sites on the edge downtown	Contributor	<ul style="list-style-type: none"> <li>Define trends and craft a vision and messaging for residential investment</li> <li>Encourage second floor residential improvements to increase property values, retain tenants and increase rental rates</li> <li>Partner with the City and private developers to identify sites for potential housing options and projects</li> <li>Continue real estate investment club outreach</li> </ul>	X	X  X X		<p>Created the Lifestyle piece as support material for downtown property owners and agent – need to distribute more widely</p> <p>Hosted the Downtown Summit with a focus on residential mixed use development</p> <p>Included in several conversation on potential developments that include residential or temporary housing.</p> <p>Home Builder Association still has interest in hosting a downtown event with us</p>
	3.2 Preserve and enhance historic neighborhoods adjacent to downtown	Support and Promote					

Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
	3.3 Promote development of neighborhood serving businesses to meet the basic shopping and service needs of downtown and nearby residents	Major Partner	<ul style="list-style-type: none"> <li>In partnership with the Downtown Appleton Neighborhood Group (DANG), administer a Downtowner survey to identify needs and desired amenities</li> <li>Explore the creation of a concierge service for downtown residents to provide an order process and pick up space for services such as grocery, dry cleaning, UPS pick up.</li> <li>Continue efforts to make downtown pet-friendly: waste stations, leash hooks, and a downtown dog park.</li> </ul>		X  X  X		<p>Reached out to DANG but they are no longer active. Requested input from the City on potential survey tool for reaching downtown residents – the challenge is how to get the online survey to them!</p> <p>No work on this</p> <p>Second waste station maintenance partner now secured with Acoca Coffee. Request for installation. Will approach the CARE team to also help with waste stations</p> <p>Still have two leash hooks to distribute as well.</p>
	3.4 Evaluate the need to amend the Zoning Code and other tools to facilitate redevelopment in mixed-use areas bordering the downtown CBD	Support and Promote					Recently approved amendment to allow first floor residential on non College Ave streets within the CBD.

Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
	3.5 As future housing is added downtown, coordinate efforts with the Appleton Area School District (AASD)	Support and Promote					
	3.6 Enhance the image of downtown north of College Avenue	Contributor	<ul style="list-style-type: none"> <li>Microtarget spaces that are not safe, comfortable, or interesting for improvement. Partner with are residents, business and churches for quick, inexpensive improvements.</li> </ul>		X	X	Washington Square inclusion of OuterEdge building to the North – more need to expand walkability elements to the North, to the West and the Riverfront
	3.7 Support green energy and sustainable infrastructure development	Support and Promote	<ul style="list-style-type: none"> <li>Pursue electric car charging stations in downtown.</li> <li>Work with City DPW to develop a car optional plan</li> </ul>			X X	No progress. DPW said they have done some research on car charging stations.  No progress
	3.8 Promote a broad spectrum of housing types within the downtown study area	Contributor	<ul style="list-style-type: none"> <li>Host a Tour of Homes event to showcase the variety and quality of downtown living options.</li> </ul>		X		Inclusion of home builders association in the Downtown Development Summit. Still interest in hosting a home tour downtown.
	3.9 Fund and implement a “Quiet Zone”	Contributor	<ul style="list-style-type: none"> <li>Develop a noise improvement plan in collaboration with the City of Appleton. Survey downtown residents regarding major noise sources.</li> </ul>		X		Fox River House noise variance support and discussion.  Will be included in the residential survey we are working on for the fall. And Business survey

Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
	3.10 Promote well-designed transitional areas between higher density development downtown and adjacent, largely single family neighborhoods	Support and Promote					
#4 Downtown Development & Business Retention	4.1 Sustain and grow the retail niches which have formed downtown	Major Partner	<ul style="list-style-type: none"> <li>Continue to offer a business Recruitment grant program</li> <li>Administer a business retention survey</li> <li>Increase brand and image marketing to highlight our retail nodes</li> <li>Continue to offer marketing grant to BID property tenants</li> </ul>	X  X  X	X X X X	X X X X	Business Recruitment Grants: total distributed: \$8042 Player 2: \$2000 Scooter G's: \$1800 POSH: \$1460 Author's Kitchen and Bar: \$2000 Blank Slate Collective: 782  Member business survey not crafted – moved to fall project Marketing grants total to date: \$1250 Potential to reallocate to façade or recruitment based on need and the BID Board  Fall project with AASD Student Marketing Team – develop a city wide Shop Appleton campaign in cooperation with ANBA

Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
	4.2 Identify and aggressively recruit target industries	Major Partner	<ul style="list-style-type: none"> <li>Continue Business recruitment strategies that support the market analysis recommendations</li> </ul>	X	X	X	July-August work for ED committee: Develop a plan template for available property and meet with each agent/owner to discuss: <ul style="list-style-type: none"> <li>Property specs, features, challenges</li> <li>Potential uses and neighborhood fit</li> <li>Generate a leads list</li> <li>Assist agent/owner with recruitment materials and calls</li> </ul>
	4.3 Protect the existing retail blocks on College Avenue	Major Partner	<ul style="list-style-type: none"> <li>Continue grant programs: business recruitment, façade improvement, marketing</li> </ul>	X	X	X	ADI continues to offer events and promos that support retail such as Ladies Fashion Show, coupon pages for conventions, businesses want Giving Hope back.
	4.4 Add depth to retail nodes beyond College Avenue by encouraging new businesses on side streets and fronting Soldier's Square	Major Partner	<ul style="list-style-type: none"> <li>Continue Business recruitment strategies</li> </ul>	X	X	X	Jennifer continues to work one on one with business interests but cold call recruitment is minimal. More direct work with the agents and landlords needed.
	4.5 Facilitate and pursue entrepreneurial business development in the downtown	Contributor	<ul style="list-style-type: none"> <li>Participate in the development of a Business Diversity Council</li> <li>Coordinate an entrepreneur focused session or round table at annual State of the Downtown event with regional partners.</li> </ul>		X X	X	Support for Blank Slate collective through recruitment grant  Working with Kinnecter (Launch WI) event moving to Appleton this fall. We are talking about a downtown focus or track.



Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
	4.6 Create opportunities for smaller offices and business services to locate downtown, including north of College Avenue	Major Partner	<ul style="list-style-type: none"> <li>Continue Business recruitment strategies</li> <li>Continue to host an annual State of the Downtown event</li> </ul>	X	X X	X X	Tracking available space is more difficult with CoStar now unaffordable. Hosted the Downtown Summit attendance down a little this year. The added tour was a great new feature. Create two tracks: Public and Developer. Keep it all Free. More activities, take a ways, networking
	4.7 Maintain an environment favorable to larger employers in the downtown	Major Partner	<ul style="list-style-type: none"> <li>Expand our message about the role downtown and ADI's work plays in talent attraction for the region</li> </ul>	X	X	X	Participating in Regional conversation about messaging and how to help move the needle on talent attraction  Conversation on how to educate HR recruiters on highlighting downtown as a recruitment benefit to the Fox Cities area. Offered to give a presentation to SHRM would also include Future Neenah
	4.8 Support private sector efforts to redevelop and invest in downtown	Major Partner	<ul style="list-style-type: none"> <li>Continue to host an annual State of the Downtown event and actively distribute recruitment and market analysis materials to brokers and developers</li> <li>Continue grant programs: business recruitment, façade improvement, marketing</li> </ul>		X X X		Hosted the Downtown Summit attendance down a little this year. The added tour was a great new feature.  Create two tracks: Public and Developer. Keep it all Free. More activities, better take a way materials, networking  May need to look at expanding 2019 façade and recruitment Grant programs. Suggestion to limit one grant per three years to each building

Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
	4.9 Implement the block level conceptual ideas contained in Section 4 of the full chapter	Support and Promote					
#5 Mobility and Parking	5.1 Support Access Appleton initiatives through the City and BID	Contributor	<ul style="list-style-type: none"> <li>Continue to include accessibility improvements in façade grant criteria in partnership with Access Appleton.</li> </ul>	X	X	X	Grants continue to include access improvements and big bell Will host in the fall a Walk Audit using the AARP Walk Audit materials
	5.2 Continue to proactively address real and perceived parking needs as they arise	Support and Promote	<ul style="list-style-type: none"> <li>Coordinate a parking promotion to highlight the parking App, ramps, variety of meters, best practices etc.. Social, window clings, ads</li> </ul>	X	X		<p>We continue to express concerns about the loss of parking once the blue ramp comes down and the proposed library development has also raised many concerns about parking access and capacity</p> <p>More parking will be lost with Appleton Street reconstruction</p> <p>Need to work closer with DPW on parking promotion.</p> <p>- Passport App is promoted on our website</p>
	5.3 Improve pedestrian and bicycle connections to and through the downtown	Support and Promote	<ul style="list-style-type: none"> <li>Create and promote new walking and biking routes with an App.</li> <li>Encourage enforcement of the Walk Your Wheels city campaign</li> </ul>		X  X		<p>An app is not a cost effective approach. The new public art walking map is a great addition</p> <p>Otocast public art tour also great.</p> <p>Encouraging a second bike coral on the West end side street</p> <p>Walk your wheels - New emblems are much better</p>

Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
	5.4 Implement the recommendations contained in the 2016 Downtown Mobility Plan	Support and Promote	<ul style="list-style-type: none"> <li>Participation in Appleton Street reconstruction project</li> </ul>		X	X	2019 Appleton Street reconstruction – no new information at this time.
	5.5 Endorse a system of public transportation centered on downtown	Support and Promote	<ul style="list-style-type: none"> <li>Continue to fund 40% of the trolley service for Thursday night, Friday night and all-day Saturday.</li> </ul>		X	X	Trolley partnership continues Riverheath promoting as great way to get to their concerts! Eagle Flats residents also continue to ride often Trolley rider numbers: 1182 through June 28
	5.6 Plan, design, and implement bike and pedestrian wayfinding signage	Support and Promote					Spaces and Places plan work
	5.7 Promote downtown development best practices which encourage walkability	Contributor	<ul style="list-style-type: none"> <li>Add question to the annual business survey to share block improvements to neighboring building facades or infrastructure</li> <li>Continue support for CARE program to keep Downtown clean (more in management)</li> </ul>	X	X		Business survey late summer early fall  CARE team expansion (see #6)
#6 Downtown Management	6.1 Update the Downtown Plan as initiatives are completed or new opportunities arise	Support and Promote	<ul style="list-style-type: none"> <li>Continued participation in plan reviews</li> </ul>		X	X	

<b>Initiatives</b>	<b>Strategies</b>	<b>ADI/BID/ CDA Role</b>	<b>Work Plan</b>	<b>BID Funded</b>	<b>2018</b>	<b>Thru 2020</b>	<b>Midyear 2018 Updates</b>
	6.2 Uphold support for Appleton Downtown, Inc. and the Business Improvement District	Major Partner	<ul style="list-style-type: none"> <li>• Manage cooperative agreement between the BID and ADI</li> <li>• Revise ADI Operating Model to increase bandwidth available for non-event projects</li> <li>• Complete an event and promotion ROI evaluation including business survey responses, board and staff reviews</li> <li>• Create a more structured internship program to work with high school and college students</li> <li>• Enhance our social media depth with original content creation including a podcast series</li> </ul>	X	X X  X X X	X	<p>Staff role transitions since Anne retiring, Lisa joining the team, Lynn in Marketing role and Brian assisting with LTL management and more involvement with economic development committee</p> <p>Staff completed an event review. The Board has requested to spend more time at the retreat on event evaluation as well as riverfront inclusion in our program of work</p> <p>Working with the Volunteer Center to create a more structured volunteer program for our events, office needs, and the Ambassador program we still plan to launch this year.</p> <p>Marketing report attached: More video creation this year. Facebook live Instagram much more active Farm Market and concert filters created</p>

<b>Initiatives</b>	<b>Strategies</b>	<b>ADI/BID/ CDA Role</b>	<b>Work Plan</b>	<b>BID Funded</b>	<b>2018</b>	<b>Thru 2020</b>	<b>Midyear 2018 Updates</b>
	6.3 Ensure the cleanliness and safety of the downtown and surrounding neighborhoods	Major Partner	<ul style="list-style-type: none"> <li>Add monitoring mechanisms to the CARE program, in partnership with Riverview Gardens and the City of Appleton, to ensure regular pickup of all downtown areas.</li> <li>Work with law enforcement, business, and residents to develop a security strategy for side streets and transitional areas between downtown and neighborhoods.</li> <li>Implement residential garbage strategies for shared container areas</li> <li>Continue to manage the cooperative agreement for a Washington Square security guard</li> <li>Provide diversity training sessions for our members that reflects our aspiration for all cultures and communities of people to feel safe and welcome downtown. Include in podcast</li> </ul>	X     X X	X    X X		<ul style="list-style-type: none"> <li>Expand the CARE program to add a transitional employee to add 10 hours a week of dedicated cleaning</li> <li>City has agreed to start sidewalk sweeping with their machine monthly.</li> <li>Octoberfest agreed to a powerwashing after their event.</li> <li>City has agreed to share invoice on a summer washing – Lakeshore is working to schedule</li> <li>TRASH TALK! We continue to struggle with managing the garbage container areas – unauthorized dumping, non participation but providing no solution for tenants</li> <li>Washington Square Security guard program continues to expand. New drop in center will add options for homeless for a place to go and be productive.</li> <li>Jenifer continues to review daily reports and forward to the committee.</li> <li>Report tracking now happens monthly and is reported to the committee.</li> <li>Promotion of the Dignity and Respect campaign and events. Continue to encourage business owners to sign on and support. Plan with Karen Nelson to create a short video to share with all business owners.</li> </ul>

Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
	6.4 Continue to explore potential for formation of a Riverfront Business Improvement District (BID)	Major Partner	<ul style="list-style-type: none"> <li>Adoption of riverfront BID in 2018 for budget year 2019</li> </ul>		X		ECWRPC spaces and places workshop received feedback maps from 21 people. Participants from LU, Riverheath, Marriott, Edison building, Stone Arch, Fox River Mills, City, Eagle Flats, Creative Downtown, Sculpture Valley, etc...
#7 Public Spaces & Riverfront	7.1 Complete proposed trail segments along the Fox River	Support and Promote	<ul style="list-style-type: none"> <li>Continue involvement in Ellen Kort Park planning and encourage the trail connection to Jones Park</li> </ul>		X	X	No new involvement
	7.2 Construct a grand stair case and similar stair and ramp linkages which connect downtown to the river	Support and Promote					
	7.3 Consider developing a civic plaza on a portion of the YMCA ramp site when it comes down	Support and Promote					Library core plus team involvement

Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
	7.4 Plan, design, and construct improvements to Jones Park and Ellen Kort Peace Park	Contributor	<ul style="list-style-type: none"> <li>Recruit private funding for Jones Park stage and participate in final design</li> </ul>		X	X	<p>Jones Park plan scaled back. Hillside play area and water feature removed. Budget exceeded \$225,000 for hillside, \$100,000 for water feature.</p> <p>Creative Downtown secured \$100,000 support from Principal for Jones Park remaining playground</p> <p>Meeting inclusion on stage &amp; sound logistics also power locations in the parking lot.</p> <p>We continue to voice our concern for the inability to stage portable toilets or food trucks within Jones Park. Toilets and food trucks must be staged in the parking lot behind the stage. Parking lot is rented separately from parking utility. Moving concert series to Jones less likely.</p>
	7.5 Continue to support public and private efforts to identify and develop pocket parks, alleyways, and other pedestrian opportunity zones off of College Avenue	Major Partner	<ul style="list-style-type: none"> <li>Creative Downtown to revisit exploration of alley between Radisson and Durty Leprechaun for a mini pocket park as well as additional opportunities</li> <li>Request process for city ordinance amendment to allow licensed permitted rooftop patios</li> </ul>		X  X	X	<p>Creative project evaluation process matrix discussed at the last Creative meeting. How we vet projects: including impact, cost, logistics, support and partnerships</p> <p>Current research and discussion with west end owners on creating a public use parklet in parking stalls on College Ave. or side streets. Need to open discussion with City about a proposal process</p>



Initiatives	Strategies	ADI/BID/ CDA Role	Work Plan	BID Funded	2018	Thru 2020	Midyear 2018 Updates
	7.6 Promote the identity of the riverfront through creative use of lighting	Support and Promote	<ul style="list-style-type: none"> <li>Research LED lighting options used in neighboring communities - engage Creative Downtown committee</li> </ul>		X		Bridge lighting continues to surface as a possible creative project. I'll request our committee research other communities and their process, equipment and cost
	7.7 Support creation of a new or remodeled library downtown providing space for contemplation, creation and collaboration.	Support and Promote	<ul style="list-style-type: none"> <li>Support the inclusion of the library in a downtown mix used facility</li> </ul>		X		Jennifer is a Core plus committee member. Support for the library development but expressed concerns about lost parking and access to back of properties
	7.8 Continue both public and private redevelopment along the Fox River Corridor	Major Partner	<ul style="list-style-type: none"> <li>Adoption of riverfront BID in 2018 for budget year 2019</li> </ul>		X		Riverfront Spaces and Places an important step in moving this forward

# **APPENDIX C**

**2019**

**Budget**

## Business Improvement District Budget 2019

### REVENUE

BID Assessments
Carry Over from Prior Year
Cancelled Special Assessment
Interest Income
Total

2018 Budget	2019 PROPOSED Budget
196,750	198,468
10,500	
<b>207,250</b>	<b>198,468</b>

### EXPENSES

<b>Contracted Services</b>	
	ADI Staff
	Security Washington Square
<b>Administrative</b>	
	Telephone
	Office Supplies
	Postage
	Dues, Fees, Subscriptions
	Space Lease/Rental Fees
	Internet Fees
<b>BID Audit/Accounting</b>	
<b>Marketing</b>	
	Website
	Image Advertising
	Design services
<b>Economic Development</b>	
	Façade Grants
	Marketing Grant
	Recruitment Grant
	Business Recruitment
<b>Maintenance &amp; Concierge services</b>	
	Maintenance
	Ambassador program

50,000	50,000
2,500	2,750
6,750	6,418
2,500	2,800
65,000	67,000
25,000	20,000
10,500	10,000
10,000	10,000
10,000	6,500
20,000	20,000
5,000	3,000
<b>207,250</b>	<b>198,468</b>

# APPENDIX D

## 2019 BID Board List

Board Member	Business	Category
Monica Stage – Treasurer	City of Appleton	City Government
Pam Ulness	Ulness Health and Downtown Resident	Property owner / Business Owner – service / Downtown Resident
Brad Schweb	Newmark Grubb Pfefferle	Property owner representative
Gary Schmitz – President	Universal Insurance	Business office / service
Marcie Harris	Triumph Engineering	Property and Business Owner – office
Mark Behnke – Secretary	Behnke Enterprises	Property Owner / Business Owner Hospitality
Jason Druxman	Avenue Jewelers	Retail & property/co-owner
Leah Fogle	Appleton Beer Factory	Business Owner : Hospitality
Nate Weyenberg	Angels Forever Windows of Light	Property Owner / Business Owner: Retail

# **Appendix E**

## **Schedule of Assessments**

PINLINK	Owner Last Name	Owner Name	Improvement Value	Land Value	Total Value	% Condo	Prop Unit	Prop Address	Living Unites	Assessmt		Total Assessmt
310006900	BEHNKE PROPERTIES LLC	BEHNKE PROPERTIES LLC	269000	0	269000			119 E COLLEGE AVE	0	\$ 672.50	\$ 672.50	\$ 672.50
310006900	BEHNKE PROPERTIES LLC	BEHNKE PROPERTIES LLC	239900	0	239900			109 W COLLEGE AVE	0	\$ 599.75	\$ 599.75	\$ 599.75
310033700	BGO LLC	BGO LLC	73500	0	73500			304 E COLLEGE AVE	0	\$ 183.75	\$ 250.00	\$ 250.00
310097602	VANG	MAI VANG	37300	0	37300			104 S MEMORIAL DR	0	\$ 93.25	\$ 250.00	\$ 250.00
312000200	WP & R INC	WP & R INC	171400	128600	300000			303 E COLLEGE AVE	0	\$ 750.00	\$ 750.00	\$ 750.00
312000300	NOYCE MANAGEMENT LLC	NOYCE MANAGEMENT LLC	92300	54900	147200			305 E COLLEGE AVE	0	\$ 368.00	\$ 368.00	\$ 368.00
312000400	311 COLLEGE AVE LLC	311 COLLEGE AVE LLC	117000	43000	160000			311 E COLLEGE AVE	1	\$ 400.00	\$ 400.00	\$ 400.00
312000700	PHIMMASENE	JIMMY PHIMMASENE	237800	68300	306100			321 E COLLEGE AVE	0	\$ 765.25	\$ 765.25	\$ 765.25
312001700	LOUBERTS PROPERTIES	LOUBERTS PROPERTIES LLC	281400	68600	350000			233 E COLLEGE AVE	2	\$ 875.00	\$ 875.00	\$ 875.00
312002000	ISAKSON	PETER ISAKSON	93400	30700	124100			227 E COLLEGE AVE	2	\$ 310.25	\$ 310.25	\$ 310.25
312002100	GREENE ET AL	THOMAS GREENE ET AL	91900	32100	124000			225 E COLLEGE AVE	2	\$ 310.00	\$ 310.00	\$ 310.00
312002200	223 COLLEGE LLC	223 COLLEGE LLC	123300	59400	182700			223 E COLLEGE AVE	2	\$ 456.75	\$ 456.75	\$ 456.75
312002300	SJSOCZKA LLC	SJSOCZKA LLC	45600	59400	105000			219 E COLLEGE AVE	0	\$ 262.50	\$ 262.50	\$ 262.50
312002500	MUELLER	ANTHONY MUELLER	112600	59400	172000			217 E COLLEGE AVE	0	\$ 430.00	\$ 430.00	\$ 430.00
312002600	KORN ACQUISITIONS	KORN ACQUISITIONS R.E. LLC	254300	59700	314000			215 E COLLEGE AVE	2	\$ 785.00	\$ 785.00	\$ 785.00
312002700	STUDIO 213 LLC	STUDIO 213 LLC	162300	59700	222000			213 E COLLEGE AVE	1	\$ 555.00	\$ 555.00	\$ 555.00
312002900	WELLS	JOSEPH WELLS	84700	118900	203600			209 E COLLEGE AVE	0	\$ 509.00	\$ 509.00	\$ 509.00
312003000	WELLS	JOSEPH WELLS	51700	59400	111100			207 E COLLEGE AVE	0	\$ 277.75	\$ 277.75	\$ 277.75
312003100	WELLS	JOSEPH WELLS	203600	125500	329100			201 E COLLEGE AVE	0	\$ 822.75	\$ 822.75	\$ 822.75
312003800	BEHNKE PROPERTIES LLC	BEHNKE PROPERTIES LLC	194700	37900	232600			101 E COLLEGE AVE	1	\$ 581.50	\$ 581.50	\$ 581.50
312003900	SOMA CORPORATION	SOMA CORPORATION	426700	122300	549000			103 E COLLEGE AVE	0	\$ 1,372.50	\$1,372.50	\$ 1,372.50
312004000	ASPLUND	RAYMON ASPLUND	124000	49400	173400			107 E COLLEGE AVE	2	\$ 433.50	\$ 433.50	\$ 433.50
312004100	DKS REALTY WISCONSIN	DKS REALTY WISCONSIN IV LLC	127000	53000	180000			109 E COLLEGE AVE	3	\$ 450.00	\$ 450.00	\$ 450.00
312004200	DKS REALTY WISCONSIN	DKS REALTY WISCONSIN IV LLC	136000	53000	189000			111 E COLLEGE AVE	3	\$ 472.50	\$ 472.50	\$ 472.50
312004300	ISAKSON	PETER ISAKSON	97600	55100	152700			113 E COLLEGE AVE	2	\$ 381.75	\$ 381.75	\$ 381.75
312004400	BEHNKE PROPERTIES LLC	BEHNKE PROPERTIES LLC	104600	152900	257500			115 E COLLEGE AVE	1	\$ 643.75	\$ 643.75	\$ 643.75
312004600	BEHNKE PROPERTIES LLC	BEHNKE PROPERTIES LLC	113200	46400	159600			121 E COLLEGE AVE	1	\$ 399.00	\$ 399.00	\$ 399.00
312004700	ECO PROPERTIES LLC	ECO PROPERTIES LLC	115100	44900	160000			123 E COLLEGE AVE	1	\$ 400.00	\$ 400.00	\$ 400.00
312004800	SOMA CORPORATION	SOMA CORPORATION	157800	47500	205300			125 E COLLEGE AVE	2	\$ 513.25	\$ 513.25	\$ 513.25
312004900	BEHNKE PROPERTIES LLC	BEHNKE PROPERTIES LLC	126100	58700	184800			127 E COLLEGE AVE	1	\$ 462.00	\$ 462.00	\$ 462.00
312005000	BEHNKE PROPERTIES LLC	BEHNKE PROPERTIES LLC	182700	58700	241400			129 E COLLEGE AVE	3	\$ 603.50	\$ 603.50	\$ 603.50
312005100	TAYLOR-CHANCE LLC	TAYLOR-CHANCE LLC	247600	58700	306300			133 E COLLEGE AVE	0	\$ 765.75	\$ 765.75	\$ 765.75
312005101	GREENSIDE PROPERTIES	GREENSIDE PROPERTIES LLC	135600	61900	197500			135 E COLLEGE AVE	0	\$ 493.75	\$ 493.75	\$ 493.75
312006900	BEHNKE PROPERTIES LLC	BEHNKE PROPERTIES LLC	120000	90100	210100			107 W COLLEGE AVE	0	\$ 525.25	\$ 525.25	\$ 525.25
312007000	ZUELKE BUILDING LLC	ZUELKE BUILDING LLC	1789000	133100	1922100			101 W COLLEGE AVE	0	\$ 4,805.25	\$4,805.25	\$ 4,805.25
312007200	APPLETON CENTER	APPLETON CENTER ASSOCIATES	7315900	519100	7835000			100 W LAWRENCE ST	0	\$ 19,587.50	\$5,000.00	\$ 5,000.00
312007400	SHAH BECK GROUP LLC	SHAH BECK GROUP LLC	2264800	533600	2798400			221 W COLLEGE AVE	0	\$ 6,996.00	\$5,000.00	\$ 5,000.00
312007800	BAD BADGER INVESTMENTS	BAD BADGER INVESTMENTS LLC	207500	98400	305900			215 W COLLEGE AVE	0	\$ 764.75	\$ 764.75	\$ 764.75

312007900	SOMA CORPORATION	SOMA CORPORATION	308100	146200	454300			211 W COLLEGE AVE	0	\$ 1,135.75	\$1,135.75	\$ 1,135.75
312008000	TUSLER PROPERTIES LLC	TUSLER PROPERTIES LLC	226900	73000	299900			207 W COLLEGE AVE	0	\$ 749.75	\$ 749.75	\$ 749.75
312008100	HECKENLAIBLE	STEVEN HECKENLAIBLE	231800	43200	275000			205 W COLLEGE AVE	2	\$ 687.50	\$ 687.50	\$ 687.50
312008200	CLEO'S REAL ESTATE	CLEO'S REAL ESTATE PARTNERSHIP	260100	44200	304300			203 W COLLEGE AVE	3	\$ 760.75	\$ 760.75	\$ 760.75
312008300	PARILLA PROPERTIES LLC	PARILLA PROPERTIES LLC	249100	53100	302200			201 W COLLEGE AVE	0	\$ 755.50	\$ 755.50	\$ 755.50
312008400	THEOBALD-APPLETON	THEOBALD-APPLETON RENTAL	114000	24200	138200			117 S APPLETON ST	1	\$ 345.50	\$ 345.50	\$ 345.50
312009200	MCGREGORS LLC	MCGREGORS LLC	93800	56200	150000			343 W COLLEGE AVE	0	\$ 375.00	\$ 375.00	\$ 375.00
312009201	KONIETZKI HOLDINGS LLC	KONIETZKI HOLDINGS LLC	123800	44000	167800			345 W COLLEGE AVE	0	\$ 419.50	\$ 419.50	\$ 419.50
312009500	APPLETON LAND LLC	APPLETON LAND LLC	3112600	321700	3434300	21.00%		333 W COLLEGE AVE	0	\$ 8,585.75	\$5,000.00	\$ 1,050.00
312009600	APPLETON LAND LLC	APPLETON LAND LLC	12287000	1963700	14250700	79.00%		333 W COLLEGE AVE	0	\$ 35,626.75	\$5,000.00	\$ 3,950.00
312014400	ONE LAWRENCE STREET	ONE LAWRENCE STREET LLC	87100	720100	807200			209 S ALLEN ST	0	\$ 2,018.00	\$2,018.00	\$ 2,018.00
312023300	FOX CITIES CHAMBER OF	FOX CITIES CHAMBER OF COMMERCE	475400	179600	655000			125 N SUPERIOR ST	0	\$ 1,637.50	\$1,637.50	\$ 1,637.50
312023500	HVN COMMERCIAL	HVN COMMERCIAL HOLDINGS LLC	1328900	401100	1730000			342 W COLLEGE AVE	0	\$ 4,325.00	\$4,325.00	\$ 4,325.00
312023800	EVANS	STEPHEN EVANS	2010700	332300	2343000			330 W COLLEGE AVE	0	\$ 5,857.50	\$5,000.00	\$ 5,000.00
312024200	STREUR TRUST ET AL	WILLIAM STREUR TRUST ET AL	179500	110500	290000			322 W COLLEGE AVE	0	\$ 725.00	\$ 725.00	\$ 725.00
312024300	BATRA HOSPITALITY	BATRA HOSPITALITY GROUP INC	500300	326700	827000			318 W COLLEGE AVE	0	\$ 2,067.50	\$2,067.50	\$ 2,067.50
312024800	WEYENBERG	NATHAN WEYENBERG	105000	57000	162000			310 W COLLEGE AVE	0	\$ 405.00	\$ 405.00	\$ 405.00
312025000	FOX CITIES HOTEL	FOX CITIES HOTEL INVESTORS LLC	6618300	333700	6952000			300 W COLLEGE AVE	0	\$ 17,380.00	\$5,000.00	\$ 5,000.00
312025300	BANK ONE	BANK ONE	158300	378300	536600			131 N APPLETON ST	0	\$ 1,341.50	\$1,341.50	\$ 1,341.50
312025700	222 BUILDING LLC	222 BUILDING LLC	10472900	567800	11040700			222 W COLLEGE AVE	0	\$ 27,601.75	\$5,000.00	\$ 5,000.00
312026000	PATTEN PROPERTIES LLC	PATTEN PROPERTIES LLC	706800	144200	851000			210 W COLLEGE AVE	0	\$ 2,127.50	\$2,127.50	\$ 2,127.50
312026300	BANK ONE	BANK ONE	1369000	305100	1674100			200 W COLLEGE AVE	0	\$ 4,185.25	\$4,185.25	\$ 4,185.25
312027201	COUTU LLC	COUTU LLC	280600	57700	338300			124 N APPLETON ST	0	\$ 845.75	\$ 845.75	\$ 845.75
312027202	HIETPAS	DAVID HIETPAS	225200	49800	275000			115 W WASHINGTON ST	0	\$ 687.50	\$ 687.50	\$ 687.50
312027303	ISLAND MEDICAL LLC	ISLAND MEDICAL LLC ET AL	100	6400	6500	1.30%	UNIT 50B	100 W COLLEGE AVE	0	\$ 16.25	\$ 250.00	\$ 65.00
312027304	ISLAND MEDICAL LLC	ISLAND MEDICAL LLC ET AL	100	3900	4000	0.80%	UNIT 50C	100 W COLLEGE AVE	0	\$ 10.00	\$ 250.00	\$ 40.00
312027305	ISLAND MEDICAL LLC	ISLAND MEDICAL LLC ET AL	100	3900	4000	0.80%	UNIT 50D	100 W COLLEGE AVE	0	\$ 10.00	\$ 250.00	\$ 40.00
312027306	ISLAND MEDICAL LLC	ISLAND MEDICAL LLC ET AL	3200	2500	5700	0.50%	UNIT 50E	100 W COLLEGE AVE	0	\$ 14.25	\$ 250.00	\$ 25.00
312027308	ISLAND MEDICAL LLC	ISLAND MEDICAL LLC ET AL	0	0	0	4.50%	UNIT 50G	100 W COLLEGE AVE	0	\$ -	\$ -	\$ -
312027310	THE BUILDING FOR KIDS	THE BUILDING FOR KIDS INC	19900	0	19900	0.00%	UNIT 100A	100 W COLLEGE AVE	0	\$ 49.75	\$ 250.00	\$ -
312027312	PFEFFERLE FAMILY LTD	PFEFFERLE FAMILY LTD PARTNERSHIP	87700	5900	93600	1.20%	UNIT 100C	116 N APPLETON ST	0	\$ 234.00	\$ 250.00	\$ 60.00
312027330	ISLAND MEDICAL LLC	ISLAND MEDICAL LLC ET AL	987400	74000	1061400	15.00%	UNIT 300A	100 W COLLEGE AVE	0	\$ 2,653.50	\$2,653.50	\$ 750.00
312027340	ISLAND MEDICAL LLC	ISLAND MEDICAL LLC ET AL	992200	74500	1066700	15.10%	UNIT 400A	100 W COLLEGE AVE	0	\$ 2,666.75	\$2,666.75	\$ 755.00
312027341	ISLAND MEDICAL LLC	ISLAND MEDICAL LLC ET AL	4400	500	4900	0.10%	UNIT 400B	100 W COLLEGE AVE	0	\$ 12.25	\$ 250.00	\$ 5.00



312027342	ISLAND MEDICAL LLC	ISLAND MEDICAL LLC ET AL	6900	500	7400	0.10%	UNIT 400C	100 W COLLEGE AVE	0	\$ 18.50	\$ 250.00	\$ 5.00
312028200	PFEFFERLE INVESTMENTS	PFEFFERLE INVESTMENTS INC ET AL	1928800	447100	2375900	34.00%	UNIT 001	122 E COLLEGE AVE	0	\$ 5,939.75	\$5,000.00	\$ 1,700.00
312028201	PFEFFERLE INVESTMENTS	PFEFFERLE INVESTMENTS INC ET AL	7100	2200	9300	0.17%	UNIT 002	122 E COLLEGE AVE	0	\$ 23.25	\$ 250.00	\$ 8.50
312028202	WASHINGTON STREET R.E.	WASHINGTON STREET R.E. INVESTMENT	1194600	123900	1318500	9.42%	UNIT 101	122 E COLLEGE AVE	0	\$ 3,296.25	\$3,296.25	\$ 471.00
312028203	WASHINGTON STREET R.E.	WASHINGTON STREET R.E. INVESTMENT	19500	7100	26600	0.54%	UNIT 102	122 E COLLEGE AVE	0	\$ 66.50	\$ 250.00	\$ 27.00
312028204	WASHINGTON STREET R.E.	WASHINGTON STREET R.E. INVESTMENT	71600	12200	83800	0.93%	UNIT 103	122 E COLLEGE AVE	0	\$ 209.50	\$ 250.00	\$ 46.50
312028205	HOFFMAN HOLDINGS LLC	HOFFMAN HOLDINGS LLC ET AL	19000	7600	26600	0.58%	UNIT 104	122 E COLLEGE AVE	0	\$ 66.50	\$ 250.00	\$ 29.00
312028206	APPLETON EDUCATION	APPLETON EDUCATION FOUNDATION INC	674300	0	674300	12.68%	UNIT 105	122 E COLLEGE AVE	0	\$ 1,685.75	\$1,685.75	\$ 634.00
312028207	PFEFFERLE INVESTMENTS	PFEFFERLE INVESTMENTS INC ET AL	1606800	166700	1773500	0.38%	UNIT 201	122 E COLLEGE AVE	0	\$ 4,433.75	\$4,433.75	\$ 19.00
312028208	PFEFFERLE INVESTMENTS	PFEFFERLE INVESTMENTS INC ET AL	13800	5000	18800	18.52%	UNIT 202	122 E COLLEGE AVE	0	\$ 47.00	\$ 250.00	\$ 926.00
312028210	PFEFFERLE INVESTMENTS	PFEFFERLE INVESTMENTS INC ET AL	2327500	243500	2571000	0.26%	UNIT 204	122 E COLLEGE AVE	0	\$ 6,427.50	\$5,000.00	\$ 13.00
312028211	PFEFFERLE INVESTMENTS	PFEFFERLE INVESTMENTS INC ET AL	10000	3400	13400	0.27%	UNIT 205	122 E COLLEGE AVE	0	\$ 33.50	\$ 250.00	\$ 13.50
312028212	PFEFFERLE INVESTMENTS	PFEFFERLE INVESTMENTS INC ET AL	9700	3600	13300	3.45%	UNIT 206	122 E COLLEGE AVE	0	\$ 33.25	\$ 250.00	\$ 172.50
312028213	WASHINGTON STREET R.E.	WASHINGTON STREET R.E. INVESTMENT	410700	45400	456100	4.37%	UNIT 301	122 E COLLEGE AVE	0	\$ 1,140.25	\$1,140.25	\$ 218.50
312028214	WASHINGTON STREET R.E.	WASHINGTON STREET R.E. INVESTMENT	554800	57500	612300	6.64%	UNIT 106	122 E COLLEGE AVE	0	\$ 1,530.75	\$1,530.75	\$ 332.00
312028215	HOFFMAN HOLDINGS LLC	HOFFMAN HOLDINGS LLC ET AL	871800	87300	959100		UNIT 107	122 E COLLEGE AVE	0	\$ 2,397.75	\$2,397.75	\$ -
312028700	APPLETON HOTEL GROUP	APPLETON HOTEL GROUP LLC	227700	60300	288000			100 E COLLEGE AVE	0	\$ 720.00	\$ 720.00	\$ 720.00
312029001	TAM LLC	TAM LLC	769500	1209400	1978900			10 E COLLEGE AVE	0	\$ 4,947.25	\$4,947.25	\$ 4,947.25
312030200	DAUNTLESS PROPERTIES	DAUNTLESS PROPERTIES LLC	114000	26000	140000			130 N MORRISON ST	0	\$ 350.00	\$ 350.00	\$ 350.00
312030300	MORRISON BUILDING LLC	MORRISON BUILDING LLC	332400	96500	428900			120 N MORRISON ST	0	\$ 1,072.25	\$1,072.25	\$ 1,072.25
312031100	BROUILLARD	ROBERT BROUILLARD	123400	37100	160500			129 N DURKEE ST	2	\$ 401.25	\$ 401.25	\$ 401.25
312031200	200 EAST LLC	200 EAST LLC	527400	102600	630000			200 E COLLEGE AVE	0	\$ 1,575.00	\$1,575.00	\$ 1,575.00
312031300	FA & VB LLC	FA & VB LLC	272500	97500	370000			204 E COLLEGE AVE	5	\$ 925.00	\$ 925.00	\$ 925.00
312031500	TENNIE'S JEWELRY	TENNIE'S JEWELRY PROPERTIES LLC	92500	47500	140000			208 E COLLEGE AVE	2	\$ 350.00	\$ 350.00	\$ 350.00
312031600	VANDINTER	BRADLEY VANDINTER	88300	49700	138000			212 E COLLEGE AVE	4	\$ 345.00	\$ 345.00	\$ 345.00
312031700	QUEEN BEE RESTAURANT	QUEEN BEE RESTAURANT INC	242300	97200	339500			216 E COLLEGE AVE	4	\$ 848.75	\$ 848.75	\$ 848.75
312031900	SCOTT	HELEN SCOTT	275600	94000	369600			218 E COLLEGE AVE	5	\$ 924.00	\$ 924.00	\$ 924.00

312032100	HALEY'S PROPERTIES ONE	HALEY'S PROPERTIES ONE LLC	140900	45900	186800			222 E COLLEGE AVE	0	\$ 467.00	\$ 467.00	\$ 467.00
312032200	THE WEIDERS LLC	THE WEIDERS LLC	355000	78500	433500			224 E COLLEGE AVE	1	\$ 1,083.75	\$1,083.75	\$ 1,083.75
312032300	CJW PROPERTIES LLC	CJW PROPERTIES LLC	113800	67300	181100			230 E COLLEGE AVE	4	\$ 452.75	\$ 452.75	\$ 452.75
312032400	CJW PROPERTIES LLC	CJW PROPERTIES LLC	138500	60500	199000			232 E COLLEGE AVE	3	\$ 497.50	\$ 497.50	\$ 497.50
312032500	CJW PROPERTIES LLC	CJW PROPERTIES LLC	60700	8400	69100			109 N DURKEE ST	1	\$ 172.75	\$ 250.00	\$ 250.00
312032701	WAGNER ET AL	TIMOTHY WAGNER ET AL	123600	37400	161000			118 N DURKEE ST	2	\$ 402.50	\$ 402.50	\$ 402.50
312032800	RICKS REVOC LIV TRUST	DREW RICKS REVOC LIV TRUST	51600	107400	159000			309 E WASHINGTON ST	0	\$ 397.50	\$ 397.50	\$ 397.50
312033300	LAWRENCE UNIV OF WI	LAWRENCE UNIV OF WI	12300	142900	155200			323 E WASHINGTON ST	0	\$ 388.00	\$ 388.00	\$ 388.00
312033400	331 PROPERTIES LLP	331 PROPERTIES LLP	195500	42500	238000			331 E WASHINGTON ST	0	\$ 595.00	\$ 595.00	\$ 595.00
312033700	BGO LLC	BGO LLC	107500	206600	314100			300 E COLLEGE AVE	0	\$ 785.25	\$ 785.25	\$ 785.25
312034000	BGO LLC	BGO LLC	183700	96300	280000			308 E COLLEGE AVE	0	\$ 700.00	\$ 700.00	\$ 700.00
312034200	BOMB ALLEY LLC	BOMB ALLEY LLC	136500	45600	182100			314 E COLLEGE AVE	0	\$ 455.25	\$ 455.25	\$ 455.25
312034300	LAWRENCE UNIV OF WI	LAWRENCE UNIV OF WI	115000	163900	278900			320 E COLLEGE AVE	0	\$ 697.25	\$ 697.25	\$ 697.25
312035300	FIRSTAR BANK APPLETON	FIRSTAR BANK APPLETON	947500	492500	1440000			200 N DURKEE ST	0	\$ 3,600.00	\$3,600.00	\$ 3,600.00
312036300	230 N MORRISON LLC	230 N MORRISON LLC	209800	115600	325400			230 N MORRISON ST	0	\$ 813.50	\$ 813.50	\$ 813.50
312036600	FOND DU LAC BLDG ASSOC	FOND DU LAC BLDG ASSOC LLP	341200	88800	430000	8.19%	UNIT 100-A	200 E WASHINGTON ST	0	\$ 1,075.00	\$1,075.00	\$ 409.50
312036601	PFEFFERLE ENTERPRISES	PFEFFERLE ENTERPRISES	1006500	177600	1184100	20.73%	UNIT 200	200 E WASHINGTON ST	0	\$ 2,960.25	\$2,960.25	\$ 1,036.50
312036602	FOND DU LAC BLDG ASSOC	FOND DU LAC BLDG ASSOC LLP	910500	177600	1088100	20.73%	UNIT 300	200 E WASHINGTON ST	0	\$ 2,720.25	\$2,720.25	\$ 1,036.50
312036603	FOND DU LAC BLDG ASSOC	FOND DU LAC BLDG ASSOC	910500	177600	1088100	20.73%	UNIT 400	200 E WASHINGTON ST	0	\$ 2,720.25	\$2,720.25	\$ 1,036.50
312036604	FOND DU LAC BLDG ASSOC	FOND DU LAC BLDG ASSOC	910500	177600	1088100	20.73%	UNIT 500	200 E WASHINGTON ST	0	\$ 2,720.25	\$2,720.25	\$ 1,036.50
312036605	FOND DU LAC BLDG ASSOC	FOND DU LAC BLDG ASSOC	416900	88800	505700	8.89%	UNIT 100-B	200 E WASHINGTON ST	0	\$ 1,264.25	\$1,264.25	\$ 444.50
312037100	CONNER LLC	ETHEL CONNER LLC	125000	65000	190000			229 E FRANKLIN ST	0	\$ 475.00	\$ 475.00	\$ 475.00
312040400	SEC PROPERTIES LLC	SEC PROPERTIES LLC	138700	132200	270900			231 W FRANKLIN ST	0	\$ 677.25	\$ 677.25	\$ 677.25
312040500	214 SUPERIOR LLC	214 SUPERIOR LLC	153400	21500	174900			214 N SUPERIOR ST	1	\$ 437.25	\$ 437.25	\$ 437.25
312040800	BERKEN	SCOTT BERKEN	136600	86500	223100			233 N APPLETON ST	1	\$ 557.75	\$ 557.75	\$ 557.75
312041700	VINTAGE-SPECIALTY	VINTAGE-SPECIALTY PROPERTIES LLC	105000	30500	135500			211 N APPLETON ST	3	\$ 338.75	\$ 338.75	\$ 338.75
312041800	JK APOLLON LLC	JK APOLLON LLC	184100	34600	218700			207 N APPLETON ST	2	\$ 546.75	\$ 546.75	\$ 546.75
312041900	S & S ENTREPRENEURS	S & S ENTREPRENEURS LLC	254700	58300	313000			201 N APPLETON ST	4	\$ 782.50	\$ 782.50	\$ 782.50
312042800	GANNETT MIDWEST	GANNETT MIDWEST PUBLISHING INC	672100	455200	1127300			306 W WASHINGTON ST	0	\$ 2,818.25	\$2,818.25	\$ 2,818.25
312043006	HOERSCH	ROBERT HOERSCH	142200	71100	213300			218 N DIVISION ST	0	\$ 533.25	\$ 533.25	\$ 533.25
312045800	STELLA LUNA PROPERTIES	STELLA LUNA PROPERTIES LLC	177000	42000	219000			130 E FRANKLIN ST	0	\$ 547.50	\$ 547.50	\$ 547.50
313084700	MIP LLC	MIP LLC	300400	72000	372400			201 S WALNUT ST	1	\$ 931.00	\$ 931.00	\$ 931.00
313084900	DEXTERS PUB LLC	DEXTERS PUB LLC	121200	28800	150000			211 S WALNUT ST	1	\$ 375.00	\$ 375.00	\$ 375.00
313085500	NORWEST BANK WISCONSIN	NORWEST BANK WISCONSIN APPLETON	141900	375900	517800			516 W EIGHTH ST	0	\$ 1,294.50	\$1,294.50	\$ 1,294.50
313087600	THAO PROPERTIES LLC	THAO PROPERTIES LLC	144800	61200	206000			206 S MEMORIAL DR	0	\$ 515.00	\$ 515.00	\$ 515.00
313087700	THAO REVOCABLE TRUST	CHUNGYIA THAO REVOCABLE TRUST	28500	34800	63300			625 W LAWRENCE ST	0	\$ 158.25	\$ 250.00	\$ 250.00
313087800	FOUR-M PROPERTIES LLC	FOUR-M PROPERTIES LLC	46300	77700	124000			621 W LAWRENCE ST	0	\$ 310.00	\$ 310.00	\$ 310.00

313087900	BEHNKE PROPERTIES LLC	BEHNKE PROPERTIES LLC	45600	42900	88500			617 W LAWRENCE ST	0	\$ 221.25	\$ 250.00	\$ 250.00
313088300	DECLEENE-ZELLNER LLC	DECLEENE-ZELLNER LLC	448300	145700	594000			215 S MEMORIAL DR	0	\$ 1,485.00	\$1,485.00	\$ 1,485.00
313093400	BOYLE	JAMES BOYLE	47400	77600	125000			131 S BADGER AVE	0	\$ 312.50	\$ 312.50	\$ 312.50
313093700	S & K FOOD MART INC	S & K FOOD MART INC	314900	132800	447700			911 W COLLEGE AVE	0	\$ 1,119.25	\$1,119.25	\$ 1,119.25
313093800	NEVINS REVOCABLE TRUST	LANCE NEVINS REVOCABLE TRUST	321000	115600	436600			843 W COLLEGE AVE	0	\$ 1,091.50	\$1,091.50	\$ 1,091.50
313094300	AMS 823/825 LLC	AMS 823/825 LLC	16200	63800	80000			823 W COLLEGE AVE	0	\$ 200.00	\$ 250.00	\$ 250.00
313094302	AMS 827 LLC	AMS 827 LLC	400	44600	45000			827 W COLLEGE AVE	0	\$ 112.50	\$ 250.00	\$ 250.00
313094400	PIERRI REVOCABLE TRUST	SARA PIERRI REVOCABLE TRUST	79200	25200	104400			819 W COLLEGE AVE	1	\$ 261.00	\$ 261.00	\$ 261.00
313094500	PIERRI REVOCABLE TRUST	SARA PIERRI REVOCABLE TRUST	139500	40500	180000			815 W COLLEGE AVE	0	\$ 450.00	\$ 450.00	\$ 450.00
313094501	PIERRI REVOCABLE TRUST	SARA PIERRI REVOCABLE TRUST	52500	20800	73300			813 W COLLEGE AVE	0	\$ 183.25	\$ 250.00	\$ 250.00
313094600	PIONEER PROFESSIONAL	PIONEER PROFESSIONAL CARPET CARE	62300	20200	82500			809 W COLLEGE AVE	0	\$ 206.25	\$ 250.00	\$ 250.00
313094700	SMART INVESTING LLC	SMART INVESTING LLC	67700	20200	87900			807 W COLLEGE AVE	2	\$ 219.75	\$ 250.00	\$ 250.00
313094800	WENZ RENTAL PROPERTIES	WENZ RENTAL PROPERTIES LLC	115200	46100	161300			801 W COLLEGE AVE	0	\$ 403.25	\$ 403.25	\$ 403.25
313096000	745 COLLEGE LLC	745 COLLEGE LLC	274500	29500	304000			745 W COLLEGE AVE	8	\$ 760.00	\$ 760.00	\$ 760.00
313096100	I KNOW, RIGHT? LLC	I KNOW, RIGHT? LLC	33300	45100	78400			741 W COLLEGE AVE	0	\$ 196.00	\$ 250.00	\$ 250.00
313096301	THEADOCIA LLC	THEADOCIA LLC	142700	64400	207100			733 W COLLEGE AVE	0	\$ 517.75	\$ 517.75	\$ 517.75
313096400	YU ET AL	SHERMAN YU ET AL	185300	114500	299800			719 W COLLEGE AVE	0	\$ 749.50	\$ 749.50	\$ 749.50
313097200	PACIFICA APPLETON LLC	PACIFICA APPLETON LLC	210000	269500	479500			127 S MEMORIAL DR	0	\$ 1,198.75	\$1,198.75	\$ 1,198.75
313097600	MILLER ET AL	WILLIAM MILLER ET AL	224600	69400	294000			623 W COLLEGE AVE	8	\$ 735.00	\$ 735.00	\$ 735.00
313097601	VANG	MAI VANG	48100	107500	155600			100 S MEMORIAL DR	0	\$ 389.00	\$ 389.00	\$ 389.00
313097900	APPLETON WEST END	APPLETON WEST END REALTY LTD	271700	202300	474000			609 W COLLEGE AVE	4	\$ 1,185.00	\$1,185.00	\$ 1,185.00
313098300	DAS VENTURES HOLDINGS	DAS VENTURES HOLDINGS LLC	488600	112500	601100			603 W COLLEGE AVE	0	\$ 1,502.75	\$1,502.75	\$ 1,502.75
313098500	LISON	JAMES LISON	168900	46100	215000			601 W COLLEGE AVE	1	\$ 537.50	\$ 537.50	\$ 537.50
313098600	MCFLESHMAN'S COMMONS	MCFLESHMAN'S COMMONS LLC	189600	63900	253500			115 S STATE ST	0	\$ 633.75	\$ 633.75	\$ 633.75
313098800	HINZMAN	PAUL HINZMAN	126500	83000	209500			121 S STATE ST	0	\$ 523.75	\$ 523.75	\$ 523.75
313099300	BOXER ENTERPRISES LLC	BOXER ENTERPRISES LLC	108100	59900	168000			620 W LAWRENCE ST	0	\$ 420.00	\$ 420.00	\$ 420.00
313099600	MAZZA	ROBERT MAZZA	138000	182000	320000			122 S MEMORIAL DR	0	\$ 800.00	\$ 800.00	\$ 800.00
313099800	BOXER ENTERPRISES LLC	BOXER ENTERPRISES LLC	35600	24400	60000			613 W COLLEGE AVE	0	\$ 150.00	\$ 250.00	\$ 250.00
313099900	GREINER	JOHN GREINER	151100	51800	202900			535 W COLLEGE AVE	1	\$ 507.25	\$ 507.25	\$ 507.25
313100300	EFS LLC	EFS LLC	724800	246400	971200			523 W COLLEGE AVE	10	\$ 2,428.00	\$2,428.00	\$ 2,428.00
313100400	KOROLL PROPERTIES LLC	KOROLL PROPERTIES LLC	336300	77600	413900			519 W COLLEGE AVE	0	\$ 1,034.75	\$1,034.75	\$ 1,034.75
313100800	NORWEST BANK WISCONSIN	NORWEST BANK WISCONSIN APPLETON	791700	341000	1132700			118 S STATE ST	0	\$ 2,831.75	\$2,831.75	\$ 2,831.75
313101500	VICTORIA	CRESENCIO VICTORIA	55700	24300	80000			510 W LAWRENCE ST	0	\$ 200.00	\$ 250.00	\$ 250.00
313101700	HAUSSERMAN ET AL	ROBERT HAUSSERMAN ET AL	78000	82000	160000			119 S WALNUT ST	6	\$ 400.00	\$ 400.00	\$ 400.00
313102000	HVN COMMERCIAL	HVN COMMERCIAL HOLDINGS LLC	415600	109400	525000			509 W COLLEGE AVE	0	\$ 1,312.50	\$1,312.50	\$ 1,312.50

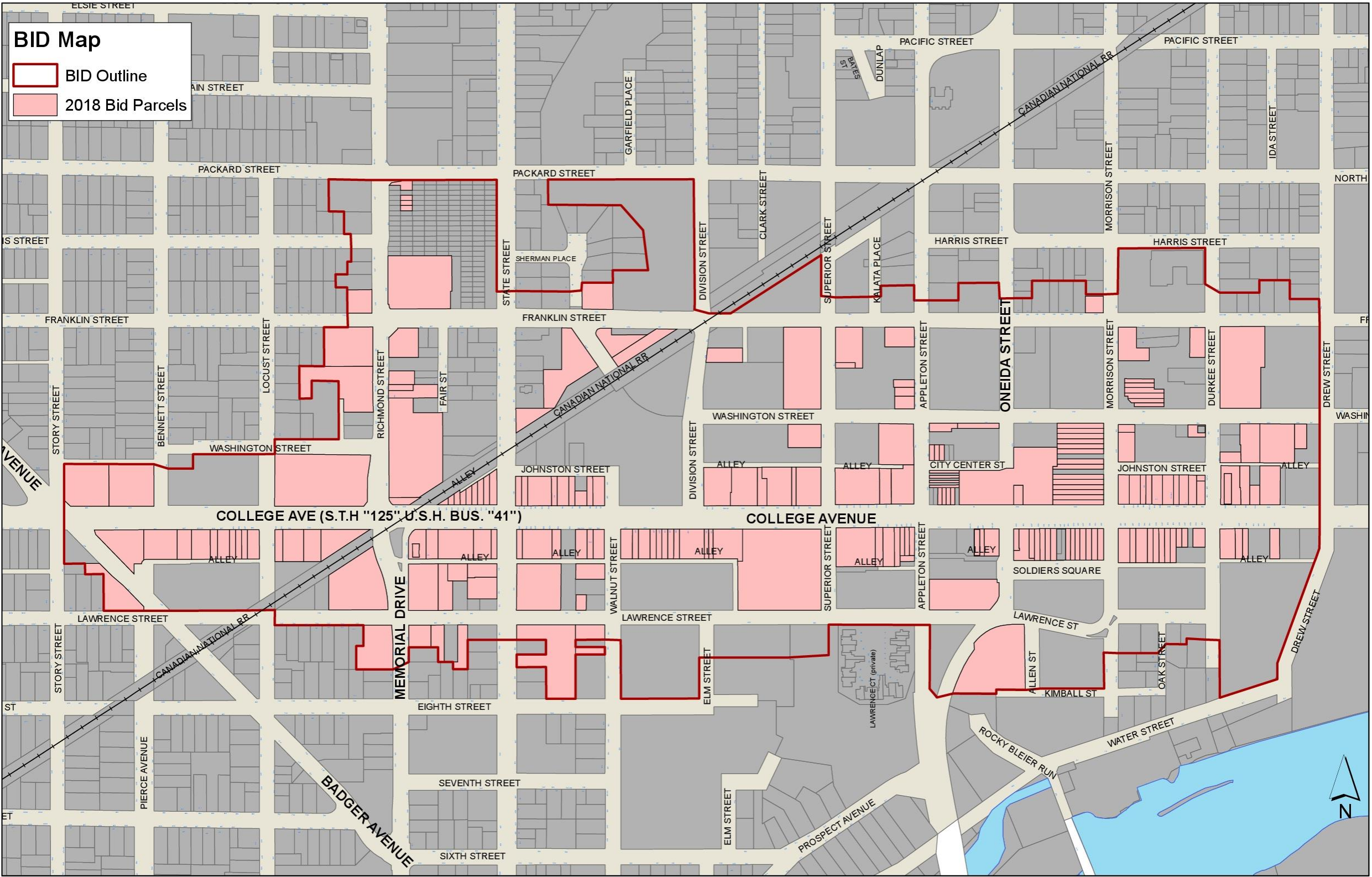
313102100	VICTORIAS APPLETON INC	VICTORIAS APPLETON INC	250100	57600	307700			507 W COLLEGE AVE	1	\$ 769.25	\$ 769.25	\$ 769.25
313102200	VICTORIAS APPLETON INC	VICTORIAS APPLETON INC	238200	121400	359600			503 W COLLEGE AVE	0	\$ 899.00	\$ 899.00	\$ 899.00
313102300	THE BAR GROUP LLC	THE BAR GROUP LLC	789500	138200	927700			427 W COLLEGE AVE	0	\$ 2,319.25	\$2,319.25	\$ 2,319.25
313102500	OTTPERTIES LLC	OTTPERTIES LLC	193000	66200	259200			425 W COLLEGE AVE	0	\$ 648.00	\$ 648.00	\$ 648.00
313102700	FERRUCCIO VC INC	FERRUCCIO VC INC	97900	132500	230400			423 W COLLEGE AVE	0	\$ 576.00	\$ 576.00	\$ 576.00
313102800	M & H PROPERTIES LLC	M & H PROPERTIES LLC	242700	69300	312000			417 W COLLEGE AVE	0	\$ 780.00	\$ 780.00	\$ 780.00
313102900	ZIMJET LLC	ZIMJET LLC	167800	63500	231300			415 W COLLEGE AVE	2	\$ 578.25	\$ 578.25	\$ 578.25
313103000	JTB APPLETON LLC	JTB APPLETON LLC	203800	66200	270000			413 W COLLEGE AVE	0	\$ 675.00	\$ 675.00	\$ 675.00
313103100	ELMAZI	MERIJE ELMAZI	183800	66200	250000			411 W COLLEGE AVE	1	\$ 625.00	\$ 625.00	\$ 625.00
313103200	GUYETTE	TIMOTHY GUYETTE	128800	66200	195000			409 W COLLEGE AVE	0	\$ 487.50	\$ 487.50	\$ 487.50
313103300	AH&M ENTERPRISES LLC	AH&M ENTERPRISES LLC	1090700	277700	1368400			403 W COLLEGE AVE	0	\$ 3,421.00	\$3,421.00	\$ 3,421.00
315069300	KRUEGER	LEWIS KRUEGER	95200	71800	167000			305 N RICHMOND ST	0	\$ 417.50	\$ 417.50	\$ 417.50
315071200	BLUE OFFICE LLC	BLUE OFFICE LLC	385800	239200	625000			225 N RICHMOND ST	0	\$ 1,562.50	\$1,562.50	\$ 1,562.50
315105800	STATEVIEW LLC	STATEVIEW LLC	145400	51800	197200			532 W COLLEGE AVE	4	\$ 493.00	\$ 493.00	\$ 493.00
315105900	THORNELL	ANDREW THORNELL	121000	49000	170000			530 W COLLEGE AVE	2	\$ 425.00	\$ 425.00	\$ 425.00
315106000	FLANAGAN	PATRICK FLANAGAN	267300	201500	468800			524 W COLLEGE AVE	0	\$ 1,172.00	\$1,172.00	\$ 1,172.00
315106300	MULDOON ET AL	LINDA MULDOON ET AL	74900	51800	126700			516 W COLLEGE AVE	2	\$ 316.75	\$ 316.75	\$ 316.75
315106400	MULDOON ET AL	LINDA MULDOON ET AL	36600	103100	139700			514 W COLLEGE AVE	0	\$ 349.25	\$ 349.25	\$ 349.25
315106500	CHUDACOFF ET AL	BRUCE CHUDACOFF ET AL	98900	52400	151300			512 W COLLEGE AVE	1	\$ 378.25	\$ 378.25	\$ 378.25
315106700	APPLETON WEST END	APPLETON WEST END REALTY LTD	129400	55700	185100			508 W COLLEGE AVE	4	\$ 462.75	\$ 462.75	\$ 462.75
315106800	APPLETON WEST END	APPLETON WEST END REALTY LTD	121400	54700	176100			506 W COLLEGE AVE	3	\$ 440.25	\$ 440.25	\$ 440.25
315107000	COLLEGE AVENUE	COLLEGE AVENUE ASSOCIATES	100000	119700	219700			500 W COLLEGE AVE	0	\$ 549.25	\$ 549.25	\$ 549.25
315107500	BELFEUIL RENTALS LLC	BELFEUIL RENTALS LLC	88500	111500	200000			509 W FRANKLIN ST	0	\$ 500.00	\$ 500.00	\$ 500.00
315107502	HAHNEMANN	TODD HAHNEMANN	85000	55500	140500			437 W FRANKLIN ST	0	\$ 351.25	\$ 351.25	\$ 351.25
315107600	CASTON	ROBERT CASTON	66000	43200	109200			136 N STATE ST	0	\$ 273.00	\$ 273.00	\$ 273.00
315110000	KWIK TRIP INC	KWIK TRIP INC	1546200	401700	1947900			306 N RICHMOND ST	0	\$ 4,869.75	\$4,869.75	\$ 4,869.75
315110100	400 NORTH LLC	400 NORTH LLC	610100	67700	677800		UNIT 1	400 N RICHMOND ST	0	\$ 1,694.50	\$1,694.50	\$ 1,694.50
315110120	400 NORTH LLC	400 NORTH LLC	117800	16800	134600		UNIT 2	400 N RICHMOND ST	0	\$ 336.50	\$ 336.50	\$ 336.50
315110121	400 NORTH LLC	400 NORTH LLC	415300	85200	500500		UNIT 3	400 N RICHMOND ST	0	\$ 1,251.25	\$1,251.25	\$ 1,251.25
315110122	400 NORTH LLC	400 NORTH LLC	141900	14100	156000		UNIT 4	400 N RICHMOND ST	0	\$ 390.00	\$ 390.00	\$ 390.00
315113900	PETROLEUM REALTY IV	PETROLEUM REALTY IV LLC	8200	104500	112700			226 N RICHMOND ST	0	\$ 281.75	\$ 281.75	\$ 281.75
315114700	BOYCE	JAMIE BOYCE	60300	34700	95000			208 N RICHMOND ST	1	\$ 237.50	\$ 250.00	\$ 250.00
315114800	BOYCE	JAMIE BOYCE	69500	50500	120000			200 N RICHMOND ST	3	\$ 300.00	\$ 300.00	\$ 300.00
315114801	BOYCE	JAMIE BOYCE	66300	14700	81000			204 N RICHMOND ST	1	\$ 202.50	\$ 250.00	\$ 250.00
315115800	OLD BRICK PROPERTIES	OLD BRICK PROPERTIES LLC	489100	630900	1120000			110 N RICHMOND ST	0	\$ 2,800.00	\$2,800.00	\$ 2,800.00
315115900	HANSEN TRUST	JOHN HANSEN TRUST	35900	41700	77600			638 W COLLEGE AVE	0	\$ 194.00	\$ 250.00	\$ 250.00
315116000	SPARKY MARK LLC	SPARKY MARK LLC	67500	53500	121000			600 W COLLEGE AVE	2	\$ 302.50	\$ 302.50	\$ 302.50
315116200	KRUEGER	SHANE KRUEGER	88300	32600	120900			602 W COLLEGE AVE	1	\$ 302.25	\$ 302.25	\$ 302.25
315116300	FDS LLC	FDS LLC	102100	28500	130600			604 W COLLEGE AVE	0	\$ 326.50	\$ 326.50	\$ 326.50
315116400	VANHANDEL	FREDERICK VANHANDEL	90800	24300	115100			606 W COLLEGE AVE	1	\$ 287.75	\$ 287.75	\$ 287.75
315116500	VANHANDEL	FREDERICK VANHANDEL	98600	20200	118800			610 W COLLEGE AVE	1	\$ 297.00	\$ 297.00	\$ 297.00
315116600	INVESTMENT CREATIONS	INVESTMENT CREATIONS LLC	103700	16300	120000			612 W COLLEGE AVE	1	\$ 300.00	\$ 300.00	\$ 300.00

315116700	ASCHENBRENER	JAMES ASCHENBRENER	86900	15100	102000			614 W COLLEGE AVE	1	\$ 255.00	\$ 255.00	\$ 255.00
315116800	YDE	JOHN YDE	61700	11000	72700			616 W COLLEGE AVE	1	\$ 181.75	\$ 250.00	\$ 250.00
315116900	BARQUET-LEYTE ET AL	ANTAR BARQUET-LEYTE ET AL	30900	9700	40600			618 W COLLEGE AVE	0	\$ 101.50	\$ 250.00	\$ 250.00
315117300	GRANITE PEAK PROPERTY	GRANITE PEAK PROPERTY INVESTMENTS LP	1409300	790700	2200000			700 W COLLEGE AVE	0	\$ 5,500.00	\$5,000.00	\$ 5,000.00
315118400	CHRISTENSEN LAND CO	CHRISTENSEN LAND CO	414000	227200	641200			137 N RICHMOND ST	8	\$ 1,603.00	\$1,603.00	\$ 1,603.00
315121200	MAY REVOCABLE TRUST	JOHN MAY REVOCABLE TRUST	864000	251500	1115500			900 W COLLEGE AVE	0	\$ 2,788.75	\$2,788.75	\$ 2,788.75
315121600	CAPITAL CREDIT UNION	CAPITAL CREDIT UNION	387500	251200	638700			926 W COLLEGE AVE	0	\$ 1,596.75	\$1,596.75	\$ 1,596.75
315191800	500 W FRANKLIN STREET	500 W FRANKLIN STREET LLC	160100	69900	230000			500 W FRANKLIN ST	0	\$ 575.00	\$ 575.00	\$ 575.00
315222601	GRISHABER	FRANK GRISHABER	42200	39800	82000			407 W FRANKLIN ST	0	\$ 205.00	\$ 250.00	\$ 250.00
									166			\$ 198,468.00

# **Appendix G**

## **Map of District**









Appleton Downtown, Inc.

# 2017 ANNUAL REPORT

"We love being here in Downtown Appleton. Every day is a **new, exciting adventure**!! ADI is extremely supportive with all the events and things happening!"

– Kara Manuel, Owner of Lillians of Appleton  
the Hippest Shoppe in Town!

"We love being a part of Downtown Appleton, and **ADI is the heart of it all**. Downtown wouldn't be what it is today without these dynamic people and their drive. The opportunities that are given to all the small businesses for growth, community involvement and making a name within the Downtown are just incredible."

– Jillian Campbell,  
Shear Chaos Salon & Barbering Co.



"The easiest decision we made when starting our business was locating it in Downtown Appleton. We've always wanted to be a part of it. Now that we are, we know it was the right decision. ADI and the other Downtown businesses have developed a **truly welcoming community**, which in turn creates a unique energy that is felt and appreciated by the people who choose to spend their time and dollars Downtown."

– Jane Oliver, Mondo! Wine Bar & Retail

"Being part of a **vibrant, walkable, safe and welcoming** Downtown ensures the thousands of artists and visitors who come here for events have a memorable experience and look forward to returning!"

– Maria Van Laanen,  
President of the Fox Cities Performing Arts Center

"Being Downtown, for us, means you are at the nexus of the Fox Cities, **where people live, work and play**... and ADI is an integral part of Downtown Appleton's success. The team is creative, hardworking and responsive. They help nurture and grow our businesses, which then strengthens the Downtown community. They genuinely care about the success of the businesses and the city."

– Bill Wetzel, owner of ACOCA Coffee

Appleton  
**DOWNTOWN**  
incorporated

& BUSINESS IMPROVEMENT DISTRICT  
& CREATIVE DOWNTOWN APPLETON



# 2017 ADI & BID HIGHLIGHTS

## WELCOME:

Fox Cities Exhibition Center



- 38,000+ sq. ft. of flexible space
- Outdoor plaza with 17,000 sq. ft.
- Access to Jones Park
- Connected to hotel & additional meeting facilities
- Centrally located Downtown

## MARKETING AND EVENTS

185,851  
WEBSITE VISITS



53%  
MOBILE



38%  
DESKTOP

9%  
OTHER



12,957  
LIKES  
+21.7%



6,467  
FOLLOWERS  
+8.5%



2,240  
FOLLOWERS  
+42.6%



637  
BLOG POSTS



15,677  
LIKES  
+6.4%



3,374  
FOLLOWERS  
+9.8%

75,000

DOWNTOWN GUIDES, COUPON BOOKS, BAG STUFFERS & COASTERS DISTRIBUTED



#1  
Instagram  
ENGAGEMENT

## YEAR-ROUND EVENTS:

Farm Market | Soup Walk  
Death By Chocolate | Lunchtime Live  
Parades: Memorial Day, Flag Day & Christmas  
Heid Music Summer Concerts | Ladies' Day  
Craft Beer Walk | Mini Golf On The Town  
Small Business Saturday



## DOWNTOWN TROLLEY

7,785 RIDERS

PLUS EXPANDED ROUTE TO SERVICE RIVERHEATH



44 JOB TRAINEES

23 TRANSITIONAL EMPLOYEES

45 WEEKS OF WORK

60 GUM-BUSTING HOURS

450 HOURS OF CLEANING

397 BAGS OF TRASH



Employability skills training and a community made stronger!

## THE DOWNTOWN PLAN

Guides our program of work to support 7 Key Initiatives:

**URBAN** Form and Design

**TOURISM**, Arts, Entertainment and Education

**NEIGHBORHOOD** & Residential Development

**DOWNTOWN** Development & Business Retention

**MOBILITY** and Parking

**DOWNTOWN** Management

**PUBLIC** Spaces & Riverfront

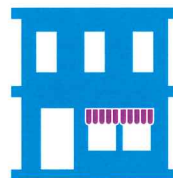


2,134

DOWNTOWN GIFT CERTIFICATES SOLD

\$56,260

GENERATED IN DOWNTOWN SPENDING!



## BUSINESS

11 NEW BUSINESSES OPENED IN THE DISTRICT

+3 JOINED FROM OUTSIDE THE BID

## 2018 WILL HAVE US FOCUSED ON:

**RIVERFRONT** Spaces and Places Plan in partnership with ECWRPC and City of Appleton

**LAUNCHING** a Volunteer Ambassador program to welcome **NEW EXHIBITION CENTER** guests

**A CLEANER** Downtown

**NEW** creative amenities and public art

**BUSINESS** recruitment & retention

**SUPPORT** for new Downtown developments

**HOSTING** our 2nd **STATE OF THE DOWNTOWN DEVELOPMENT SUMMIT** May 15th with the City of Appleton



# 2017 ADI CREATIVE DOWNTOWN APPLETON HIGHLIGHTS

ART ON  
THE TOWN  
CHALK

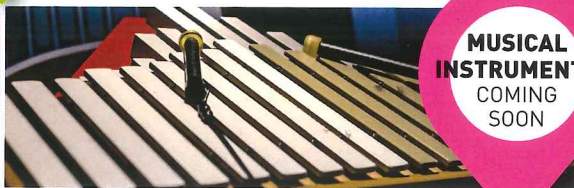


DOWNTOWN FOR  
THE HOLIDAYS

ONE STOP  
ELF  
SHOP



MUSICAL  
INSTRUMENTS  
COMING  
SOON



PET  
FRIENDLY  
AMENITIES  
DOG WASTE  
STATION



## CREATIVE PARTNERSHIPS

\$3M  
ECONOMIC  
IMPACT

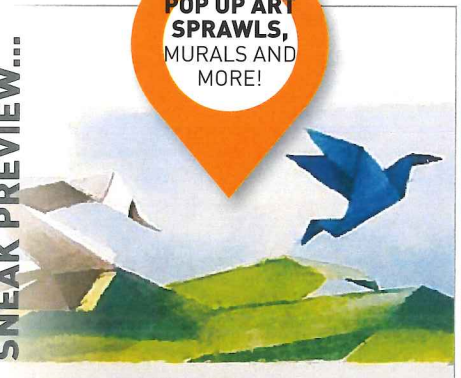
MILE OF MUSIC -  
MILE 5

250 ORIGINAL ARTISTS  
950 LIVE PERFORMANCES  
70,000 ATTENDEES



POP UP ART  
SPRAWLS,  
MURALS AND  
MORE!

NEW MURAL  
SNEAK PREVIEW...



9

SCULPTURES

SCULPTURE  
VALLEY -  
ACRE OF ART  
OTOCAST.COM



FIND MORE PUBLIC ART AT: [appletondowntown.org/getting-aroundpublic-art-map/](http://appletondowntown.org/getting-aroundpublic-art-map/)

## 2017 BID YEAR IN REVIEW

### REVENUE

	2018 Budget	2017 Actual
BID Assessments	196,750	196,387
Carry Over from Prior Year	10,500	1,534
	<b>\$207,250</b>	<b>\$197,921</b>

### EXPENSES

Contracted Services		
ADI Staff	50,000	52,318
Security Services	2,500	2,600
Administrative	6,750	6,690
BID Audit/Accounting Services	2,500	2,920
Marketing and Printing	65,000	80,502
Economic Development		
Façade Grant	25,000	13,688
Marketing Grant	10,000	6,670
Recruitment Grant	10,000	10,050
Business Recruitment	10,000	2,623
Maintenance & Concierge Services		
Maintenance CARE Program	20,000	9,360
Ambassador Program	5,000	
	<b>\$207,250</b>	<b>\$187,421</b>
<b>CARRY OVER TO 2018</b>		<b>\$10,500</b>

BID Total Value on  
225 Assessable Units:  
**\$123,013,300**

1.4% increase over previous year

82%  
OCCUPANCY

18% VACANCY

### BID Property Classification





## APPLETON DOWNTOWN, INC. AND CREATIVE DOWNTOWN APPLETON, INC. BOARD OF DIRECTORS 2017

### PRESIDENT

**Will Weider**

### PAST PRESIDENT

**John Peterson**, Peterson, Berk & Cross

### VICE PRESIDENT

**Deb Johnson**, CopperLeaf Boutique Hotel & Spa

### TREASURER

**Laura Vargosko**, Schenck SC

### SECRETARY

**Lynn Hagee**, Downtown Resident

**Christyn Abarray**, Lawrence University

**Dale Ver Voort**, Crazy Sweet

**Lyssa King**, OuterEdge Stage

**Monica Stage**, City of Appleton

**Elizabeth Ringgold**, Newmark Grubb Pfefferle

**Jill VanderLoop**, Joseph's Shoes

**Kevin Wirth**, US Venture

**Steve Lonsway**, Stone Arch Brew Pub

**Natasha Banks**, Cozy Corner and

Val U Beauty Supplies

**A. J. Olander**, West

## BUSINESS IMPROVEMENT DISTRICT BOARD OF DIRECTORS 2017

### PRESIDENT

**Gary Schmitz**, Universal Insurance

### SECRETARY

**Mark Behnke**, Basil's Pub

### TREASURER

**Monica Stage**, City of Appleton

**Steve Winter**, Rollie Winter & Associates

**Brad Schwebs**, Pfefferle Management

**Pam Ulness**, Ulness Health and Wellness

**Nate Weyenberg**, Angels Forever-Windows of Light

**Jason Druxman**, Avenue Jewelers

**Leah Fogle**, Appleton Beer Factory

## APPLETON DOWNTOWN, INC. STAFF 2017

### EXECUTIVE DIRECTOR

**Jennifer Stephany**

### MARKETING DIRECTOR

**Anne Wiegman**

### EVENT DIRECTOR

**Djuanna Hugdahl**

### EVENT SPECIALIST

**Greg Otis**

### CREATIVE

COORDINATOR

**Lynn Schemm**

### RESOURCE

DEVELOPMENT

DIRECTOR

**Brian Leone Tracy**

## THANK YOU

to all those who sponsor our events and creative projects throughout the year:

Appleton International Airport  
Ascension  
Atlas Group  
AT&T  
AZCO Inc.  
Basil's Pub  
BMO Harris Bank  
City of Appleton  
Consolidated Construction  
CopperLeaf Boutique Hotel & Spa  
Crunch Fitness  
Downtown Dental  
Faith Technologies Inc.  
Festival Foods

Fox Communities Credit Union  
Fox Cities Signs & Lighting  
Gateway Chiropractic  
General Beer  
Habush Habush & Rottier  
Heid Music  
Hoffman  
Johnson Bank  
Mile of Music  
Miron Construction  
Newmark Grubb Pfefferle  
North Wind Renewable Energy  
Octoberfest  
Peterson, Berk & Cross

Pfefferle Companies, Inc.  
Principal  
Signature Homes  
Stellar Blue Technology  
Sure Dry Basements  
ThedaCare  
Triumph Engineering  
Tundraland  
Ulness Health  
US Bank  
Warning Lites of Appleton  
West  
Wisconsin Distributors  
Wollersheim Wines

## 2017 AWARD WINNERS

### Business of the Year Award – Cozy Corner

Presented to the Business or entity that stands out from the rest and captured the admiration of the Downtown.

### The Bernie Pearlman Downtowner Award – Brian Gottlieb / Tundraland

Presented to a person who has had a significant positive impact on Downtown and displays an overwhelming passion for its success.

### The Dreamers & Doers Award – CopperLeaf Boutique Hotel & Spa

A new award last year - Presented to the business, group or individual who has significantly enhanced, for years to come, the physical and/or economic landscape of the Downtown.

### The President's Award – Principal

Presented to an individual, group or business who, within their working relationship with ADI and the Downtown, went above and beyond that usual relationship to contribute to the success of Downtown.

### The Outstanding Volunteer Award – Andy Bong

Presented to an individual whose time and commitment to the effort of building a strong Downtown highlights him or her as an outstanding volunteer and community advocate.

### Downtown Renovation Award – Gibson Music Hall

Presented to a business that has invested in the physical appearance of the building they call home in our Downtown neighborhood.

### New Business of the Year – Tempest Coffee Collective

Presented to a business new to Downtown in the last year that shows longevity and fulfills a need in the Downtown.

### Walter Kalata Landmark Award – Wooden Nickel Sports Bar & Grill

Presented to a business that has withstood the test of time and operates with passion and a strong commitment to Downtown. A place where people can remember the past and converse about the future.

*Thank you to the photographers and artists whose work graces the walls, sidewalks, windows and public spaces of our Downtown.*

Appleton Downtown, Inc.  
Creative Downtown Appleton, Inc.  
Business Improvement District  
116 N. Appleton St., Appleton, WI 54911  
920-954-9112 • Fax 920-954-0219  
lynn@appletondowntown.org

#onegreatplace    

**appletondowntown.org**

*One Great Place!*  
**DOWNTOWN**  
  
**Appleton**

City of Appleton  
Business Improvement District  
A Component Unit of the  
City of Appleton, Wisconsin

**ANNUAL FINANCIAL REPORT**

December 31, 2017



# City of Appleton Business Improvement District Appleton, Wisconsin

DECEMBER 31, 2017

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## Table of Contents

<b>INDEPENDENT AUDITORS' REPORT</b>	<b>1</b>
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Statement of Revenues, Expenses and Changes in Net Position - Budget and Actual	4
Statement of Cash Flows	5
Notes to Financial Statements	6

## Independent auditors' report

To the Board of Directors  
Appleton Business Improvement District  
City of Appleton, Wisconsin

### REPORT ON THE FINANCIAL STATEMENTS

We have audited the accompanying financial statements Appleton Business Improvement District (the "District") a component unit of the City of Appleton, Wisconsin, as of and for the year ended December 31, 2017, and the related notes to the financial statements, which collectively comprise the District's financial statements as listed in the table of contents.

### MANAGEMENT'S RESPONSIBILITY FOR THE FINANCIAL STATEMENTS

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### AUDITORS' RESPONSIBILITY

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditors consider internal control relevant to the District's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### OPINION

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the District as of December 31, 2017, and the changes in financial position and cash flows thereof for the year then ended in accordance with accounting principles generally accepted in the United States of America.

**EMPHASIS OF MATTER**

As discussed in Note 1, the financial statements present only the District and do not purport to, and do not present fairly, the financial position of the City of Appleton, Wisconsin as of December 31, 2017 and the changes in its financial position or its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America. Our opinion is not modified with respect to this matter.

**OTHER MATTERS****Required Supplementary Information**

Management has omitted the management's discussion and analysis that accounting principles generally accepted in the United States of America require to be presented to supplement the financial statements. Such missing information, although not a part of the financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the financial statements in an appropriate operational, economic, or historical context. Our opinion on the financial statements is not affected by this missing information.

**REPORT ON SUMMARIZED FINANCIAL INFORMATION**

We have previously audited the District's 2016 financial statements, and our report dated June 22, 2017, expressed an unmodified opinion on those financial statements. In our opinion, the summarized comparative information presented herein as of and for the year ended December 31, 2017, is consistent, in all material respects, with the audited financial statements from which it has been derived.



Certified Public Accountants

Green Bay, Wisconsin

August 9, 2018

## FINANCIAL STATEMENTS

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# City of Appleton Business Improvement District

## Appleton, Wisconsin

### STATEMENT OF NET POSITION DECEMBER 31, 2017 WITH COMPARATIVE AMOUNTS AS OF DECEMBER 31, 2016

	<u>2017</u>	<u>2016</u>
<b>ASSETS</b>		
Current assets		
Cash and investments	\$ 174,834	\$ 172,041
Receivables		
Special assessments	<u>61,105</u>	<u>71,746</u>
Total assets	<u>235,939</u>	<u>243,787</u>
<b>LIABILITIES</b>		
Current liabilities		
Accounts payable	<u>28,541</u>	<u>46,193</u>
<b>DEFERRED INFLOWS OF RESOURCES</b>		
Unearned revenue	<u>196,751</u>	<u>196,388</u>
<b>NET POSITION</b>		
Unrestricted	<u>10,647</u>	<u>1,206</u>
Total net position	<u>\$ 10,647</u>	<u>\$ 1,206</u>

*The notes to the financial statements are an integral part of this statement.*

# City of Appleton Business Improvement District

## Appleton, Wisconsin

**STATEMENT OF REVENUES, EXPENSES AND CHANGES IN NET POSITION**  
**BUDGET AND ACTUAL**  
**FOR THE YEAR ENDED DECEMBER 31, 2017**  
**WITH COMPARATIVE ACTUAL AMOUNTS FOR THE YEAR ENDED DECEMBER 31, 2016**

	<b>Original and Final Budget</b>	<b>2017</b>	<b>2016</b>
<b>OPERATING REVENUES</b>			
BID assessments	\$ 196,387	\$ 196,388	\$ 193,125
<b>OPERATING EXPENSES</b>			
Contracted services	47,500	54,916	60,596
Administrative			
Telephone		2,299	4,661
Office supplies		1,003	1,055
Postage		1,027	3,238
Conferences/workshops/classes		-	608
Dues, fees, and subscriptions		1,185	1,553
Facility rent		873	741
Other service contracts		302	891
Equipment		76	-
Total administrative	6,387	6,765	12,747
Audit and accounting services	2,500	2,919	2,500
Marketing			
Advertising		79,779	69,225
Printing		723	75
Total marketing	75,000	80,502	69,300
Economic development projects			
Sidewalk maintenance/amenities	15,000	9,285	5,544
Façade grants	20,000	13,696	26,738
Marketing grants	10,000	6,665	7,092
Recruiting grant	10,000	10,050	9,895
Business recruitment	10,000	2,622	4,653
Total economic development projects	65,000	42,318	53,922
Total operating expenses	196,387	187,420	199,065
Operating income (loss)	-	8,968	(5,940)
<b>NONOPERATING REVENUES</b>			
Investment income (loss)	-	473	(54)
<b>Change in net position</b>	-	9,441	(5,994)
<b>Net position - January 1</b>	1,206	1,206	7,200
<b>Net position - December 31</b>	\$ 1,206	\$ 10,647	\$ 1,206

*The notes to the financial statements are an integral part of this statement.*



# City of Appleton Business Improvement District

## Appleton, Wisconsin

### STATEMENT OF CASH FLOWS FOR THE YEAR ENDED DECEMBER 31, 2017 WITH COMPARATIVE AMOUNTS FOR THE YEAR ENDED DECEMBER 31, 2016

	2017	2016
<b>CASH FLOWS FROM OPERATING ACTIVITIES</b>		
Cash received from customers	\$ 207,392	\$ 185,016
Cash paid to suppliers	(205,072)	(165,499)
Net cash provided by operating activities	<u>2,320</u>	<u>19,517</u>
<b>CASH FLOWS FROM INVESTING ACTIVITIES</b>		
Interest received	<u>473</u>	<u>(54)</u>
<b>Change in cash and cash equivalents</b>	2,793	19,463
<b>Cash and cash equivalents - January 1</b>	<u>172,041</u>	<u>152,578</u>
<b>Cash and cash equivalents - December 31</b>	<u><u>\$ 174,834</u></u>	<u><u>\$ 172,041</u></u>
<b>RECONCILIATION OF OPERATING INCOME (LOSS) TO NET CASH PROVIDED BY OPERATING ACTIVITIES</b>		
Operating income (loss)	\$ 8,968	\$ (5,940)
Adjustments to reconcile operating income (loss) to net cash provided by operating activities		
Change in operating assets and liabilities		
Accounts receivables	10,641	(11,372)
Accounts payable	(17,652)	33,566
Unearned revenue	363	3,263
Net cash provided by operating activities	<u><u>\$ 2,320</u></u>	<u><u>\$ 19,517</u></u>

*The notes to the financial statements are an integral part of this statement.*

# City of Appleton Business Improvement District Appleton, Wisconsin

## NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED DECEMBER 31, 2017

SEE INDEPENDENT ACCOUNTANTS' REVIEW REPORT

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### NOTE 1: SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

The financial statements of the City of Appleton Business Improvement District, Appleton, Wisconsin (the "District"), have been prepared in conformity with accounting principles generally accepted in the United States of America (GAAP) as applied to government units. The Governmental Accounting Standards Board (GASB) is the accepted standard-setting body for establishing governmental accounting and financial reporting principles. The significant accounting principles and policies utilized by the District are described below:

#### A. REPORTING ENTITY

Wisconsin Statutes allow for the creation of Business Improvement Districts (BID). A BID is a geographic area within a municipality consisting of contiguous parcels, which are subject to assessments, where the assessment revenue must be used to benefit the BID. The purpose was to authorize cities, villages, and towns to create one or more business improvement districts to allow businesses within those districts to develop, manage, maintain, and promote their districts and to establish an assessment method to fund these activities. A BID affords property owners and business people a very real role in directing those affairs within the district, which influences their investment and environment. It also ensures that the beneficiaries of district programs participate in the funding of the programs.

The District is a legal entity separate and distinct from the City of Appleton, Wisconsin. The District is governed by a nine member appointed board and approved by the City Council. The members serve staggered, two year terms. A majority of the board members shall own or occupy real property in the District.

#### B. MEASUREMENT FOCUS AND BASIS OF ACCOUNTING

The accounting and financial reporting treatment applied to the District is determined by its measurement focus. The transactions of the District are accounted for using the *economic resources measurement focus*. With this measurement focus, all assets, deferred outflows of resources, liabilities, and deferred inflows of resources associated with the operations are included on the statement of net position.

The statement of net position and statement of revenues, expenses, and changes in net position are reported using the accrual basis of accounting. Under the accrual basis of accounting, revenues are recognized when earned and expenses are recorded when the liability is incurred or economic asset used. Revenues, expenses, gains, losses, assets, and liabilities resulting from exchange and exchange like transactions are recognized when the exchange takes place. Assessments are levied upon all property within the District and are recognized as revenues in the year for which they are levied. At year end, assessments for the following year are recorded as receivables and unearned revenue. Grants and similar items are recognized as revenues as soon as all eligibility requirements imposed by the provider are met. Special assessments are recorded as revenue when earned. Unbilled receivables are recorded as revenues when services are provided.

The District distinguishes *operating* revenues and expenses from *nonoperating* items. Operating revenues and expenses generally result from providing services and producing and delivering goods in connection with a proprietary fund's principal ongoing operations. The principal operating revenues of the District are charges to the district members. Operating expenses for the District include salaries and wages, operation and maintenance, business development and promotions. All revenues and expenses not meeting this definition are reported as nonoperating revenues and expenses.

When both restricted and unrestricted resources are available for use, it is the District's policy to use restricted resources first, then unrestricted resources, as they are needed.

# City of Appleton Business Improvement District Appleton, Wisconsin

## NOTES TO FINANCIAL STATEMENTS FOR THE YEAR ENDED DECEMBER 31, 2017 SEE INDEPENDENT ACCOUNTANTS' REVIEW REPORT

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### C. ASSETS, LIABILITIES, DEFERRED OUTFLOWS/INFLOWS OF RESOURCES, AND NET POSITION

#### 1. Cash and Investments

Cash and investments are combined in the financial statements. Cash deposits consist of demand and time deposits with financial institutions and are carried at cost. Investments are stated at fair value. Fair value is the price that would be received to sell an asset in an orderly transaction between market participants at the measurement date.

#### 2. BID Special Assessments

The primary source of revenue for the District is an assessment levied on property located within District boundaries. The BID assessments are determined in November, and included as a special charge on each property owner's tax bill within the District and become an enforceable lien on January 1. The BID assessments are due in full to the City by January 31<sup>st</sup> of the subsequent year, who collects and distributes to the District.

#### 3. Deferred Outflows/Inflows of Resources

Deferred outflows of resources are a consumption of net position by the government that is applicable to a future reporting period. Deferred inflows of resources are an acquisition of net position by the government that is applicable to a future reporting period. The recognition of those outflows and inflows as expenses or expenditures and revenues are deferred until the future periods to which the outflows and inflows are applicable.

#### 4. Net Position

Equity is classified as net position and displayed in three components:

- ▶ **Net investment in capital assets.** Amount of capital assets, net of accumulated depreciation, and capital related deferred outflows of resources less outstanding balances of any bonds, mortgages, notes, or other borrowings that are attributable to the acquisition, construction, or improvement of those assets and any capital related deferred inflows of resources.
- ▶ **Restricted net position.** Amount of net position that is subject to restrictions that are imposed by 1) external groups, such as creditors, grantors, contributors or laws or regulations of other governments or 2) law through constitutional provisions or enabling legislation.
- ▶ **Unrestricted net position.** Net position that is neither classified as restricted nor as net investment in capital assets.

#### 5. Claims and Judgements

Claims and judgements are recorded as expenses when the related liabilities are incurred.

### D. PRIOR YEAR INFORMATION

Comparative amounts for the prior year have been presented in the financial statements to provide an understanding of changes in the District's financial position and operations. The comparative amounts may be summarized in total and not at the level of detail required for a presentation in conformity with generally accepted accounting principles. Accordingly, such information should be read in conjunction with the District's financial statements for the year ended December 31, 2016, from which the summarized information was derived.

# City of Appleton Business Improvement District Appleton, Wisconsin

## NOTES TO FINANCIAL STATEMENTS FOR THE YEAR ENDED DECEMBER 31, 2017 SEE INDEPENDENT ACCOUNTANTS' REVIEW REPORT

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### NOTE 2: STEWARDSHIP AND COMPLIANCE

#### A. OPERATING PLAN

The budgetary information is derived from the District's annual operating plan budget and is presented using the same basis of accounting as described in Note 1.B. The 2017 Operating Plan, as approved by the Board of Directors and City Council, included provisions for District assessments and related spending of \$196,387. The board of directors and management use the budget to manage the District's program activities; however, the budget does not represent a legal budget establishing specific line item expenditure limits.

### NOTE 3: DETAILED NOTES ON ALL FUNDS

#### A. CASH AND INVESTMENTS

The District's cash and investments total \$174,834 are commingled with the cash and investment accounts of the City of Appleton; therefore, individual bank balances of the District cannot be determined. Please refer to the City's financial statements for further information.

### NOTE 4: OTHER INFORMATION

#### A. RISK MANAGEMENT

The District is exposed to various risks of loss related to torts; theft of, damage to and destruction of assets; errors and omissions; and natural disasters for which the government carries commercial insurance. The District completes an annual review of its insurance coverage to ensure adequate coverage.

#### B. CONTINGENCIES

From time to time, the District is party to other various pending claims and legal proceedings. Although the outcome of such matters cannot be forecast with certainty, it is the opinion of management that the likelihood is remote that any such claims or proceedings will have a material adverse effect on the District's financial position or results of operations.

City of Appleton  
Business Improvement District  
A Component Unit of the  
City of Appleton, Wisconsin

**MANAGEMENT COMMUNICATIONS**

December 31, 2017

# City of Appleton Business Improvement District Appleton, Wisconsin

DECEMBER 31, 2017

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## Table of Contents

**COMMUNICATION TO THE BOARD OF DIRECTORS**

**1**

**APPENDIX**

Management Representation Letter



To the Board of Directors  
City of Appleton Business Improvement District  
Appleton, Wisconsin

We have audited the financial statements of the Appleton Business Improvement District (the "District") a component unit of the City of Appleton, Wisconsin, for the year ended December 31, 2017. The District's financial statements, including our report thereon dated August 9, 2018, are presented in a separate audit report document. Professional standards require that we provide you with the following information related to our audit.

**OUR RESPONSIBILITIES UNDER U.S. GENERALLY ACCEPTED AUDITING STANDARDS AND GOVERNMENT AUDITING STANDARDS**

As stated in our engagement letter, our responsibility, as described by professional standards, is to express an opinion about whether the financial statements are fairly presented, in all material respects, in conformity with accounting principles generally accepted in the United States of America. Our audit of the financial statements does not relieve you or management of your responsibilities.

In planning and performing our audit, we considered the District's internal control over financial reporting in order to determine our auditing procedures for the purpose of expressing our opinion on the financial statements and not to provide assurance on the internal control over financial reporting.

As part of obtaining reasonable assurance about whether the District's financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grants. However, providing an opinion on compliance with those provisions is not an objective of our audit.

**PLANNED SCOPE AND TIMING OF THE AUDIT**

We performed the audit according to the planned scope and timing previously communicated to you in our correspondence about planning matters

*Qualitative Aspects of Accounting Practices*

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by the District are described in Note 1 to the financial statements. No new accounting policies were adopted and the application of existing policies was not changed during 2017. We noted no transactions entered into by the District during the year for which there is a lack of authoritative guidance or consensus. To the best of our knowledge, all significant transactions have been recognized in the financial statements in the proper period.

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. We are not aware of any particularly sensitive accounting estimates used by management in the preparation of the financial statements.

The financial statement disclosures are neutral, consistent, and clear.

### *Difficulties Encountered in Performing the Audit*

We encountered no significant difficulties in dealing with management in performing and completing our audit.

### *Corrected and Uncorrected Misstatements*

Professional standards require us to accumulate all known and likely misstatements identified during the audit, other than those that are clearly trivial, and communicate them to the appropriate level of management. Management has corrected all such misstatements. Copies of the audit adjustments are available from management. In addition, none of the misstatements detected as a result of audit procedures and corrected by management were material, either individually or in the aggregate, to the District's financial statements taken as a whole.

### *Disagreements with Management*

For purposes of this letter, a disagreement with management is a financial accounting, reporting, or auditing matter, whether or not resolved to our satisfaction, that could be significant to the financial statements or the auditors' report. No such disagreements arose during the course of our audit.

### *Management Representations*

We have requested certain representations from management that are included in the management representation letter dated August 9, 2018. The management representation letter follows this communication.

### *Management Consultations with Other Independent Accountants*

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" on certain situations. If a consultation involves application of an accounting principle to the District's financial statements or a determination of the type of auditors' opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

### *Other Audit Findings or Issues*

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to retention as the District's auditors. However, these discussions occurred in the normal course of our professional relationship and, to the best of our knowledge, our responses were not a condition to our retention.

### *Restriction on Use*

This information is intended solely for the information and use of the District Board, and management of the City of Appleton Business Improvement District and is not intended to be, and should not be, used by anyone other than these specified parties.

Sincerely,



Certified Public Accountants

Green Bay, Wisconsin  
August 9, 2018

## APPENDIX

---



*"...meeting community needs...enhancing quality of life."*

August 9, 2018

Schenck SC  
2200 Riverside Drive  
P.O. Box 23819  
Green Bay, WI 54305-3819

This representation letter is provided in connection with your audit of the financial statements of the Appleton Business Improvement District (the "District") a component unit of the City of Appleton, Wisconsin, which comprise the financial position as of December 31, 2017, and the changes in the financial position and cash flows for the year then ended, and the related notes to the financial statements for the purpose of expressing an opinion as to whether the financial statements are presented fairly, in all material respects, in accordance with accounting principles generally accepted in the United States of America (U.S. GAAP).

Certain representations in this letter are described as being limited to matters that are material. Items are considered material, regardless of size, if they involve an omission or misstatement of accounting information that, in light of surrounding circumstances, makes it probable that the judgment of a reasonable person relying on the information would be changed or influenced by the omission or misstatement. An omission or misstatement that is monetarily small in amount could be considered material as a result of qualitative factors.

We confirm, to the best of our knowledge and belief, as of August 9, 2018, the following representations made to you during your audit.

#### **FINANCIAL STATEMENTS**

1. We have fulfilled our responsibilities, as set out in the terms of the audit engagement letter dated November 6, 2017, including our responsibility for the preparation and fair presentation of the financial statements in accordance with U. S. GAAP.
2. The financial statements referred to above are fairly presented in conformity with U.S. GAAP and include all financial information of the primary government and all component units required by generally accepted accounting principles to be included in the financial reporting entity.
3. We acknowledge our responsibility for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.
4. We acknowledge our responsibility for the design, implementation, and maintenance of internal control to prevent and detect fraud.

5. Significant assumptions we used in making accounting estimates, including those measured at fair value, are reasonable.
6. Related party relationships and transactions, including revenues, expenditures/expenses, loans, transfers, leasing arrangements, and guarantees, and amounts receivable from or payable to related parties have been appropriately accounted for and disclosed in accordance with U.S. GAAP.
7. Adjustments or disclosures have been made for all events, including instances of noncompliance, subsequent to the date of the financial statements that would require adjustment to or disclosure in the financial statements.
8. We are in agreement with the adjusting journal entries you have proposed, and they have been posted to the District's accounts.
9. We are not aware of any pending or threatened litigation, claims or assessments or unasserted claims or assessments that are required to be accrued or disclosed in the financial statements, and we have not consulted a lawyer concerning litigation, claims, or assessments.
10. Guarantees, whether written or oral, under which the District is contingently liable, if any, have been properly recorded or disclosed.

#### **INFORMATION PROVIDED**


11. We have provided you with:
  - a. Access to all information, of which we are aware, that is relevant to the preparation and fair presentation of the financial statements, such as records, documentation, and other matters.
  - b. Additional information that you have requested from us for the purpose of the audit.
  - c. Unrestricted access to persons within the District from whom you determined it necessary to obtain audit evidence.
  - d. Minutes of meetings of the District Board or summaries of actions of recent meetings for which minutes have not yet been prepared.
12. All material transactions have been recorded in the accounting records and are reflected in the financial statements.
13. We made an assessment of the risk that the financial statements may be materially misstated as a result of fraud. We have disclosed the results of our assessment as follows:
  - a. We have no knowledge of any fraud or suspected fraud that affects the entity and involves:
    - i. Management,
    - ii. Employees who have significant roles in internal control, or
    - iii. Others where the fraud could have a material effect on the financial statements.
  - b. We have no knowledge of any allegations of fraud or suspected fraud affecting the District's financial statements communicated by employees, former employees, regulators, or others.
14. We have no knowledge of instances of noncompliance or suspected noncompliance with provisions of laws, regulations, contracts, or grant agreements, or abuse, whose effects should be considered when preparing financial statements.

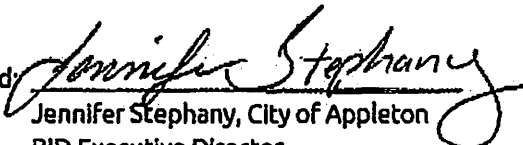
15. We are not aware of any pending or threatened litigation, claims or assessments or unasserted claims or assessments that are required to be accrued or disclosed in the financial statements, and we have not consulted a lawyer concerning litigation, claims, or assessments.
16. We have disclosed to you the identity of the District's related parties and all the related party relationships and transactions of which we are aware.

#### GOVERNMENT - SPECIFIC

17. There have been no communications from regulatory agencies concerning noncompliance with, or deficiencies in, financial reporting practices.
18. We have identified to you any previous audits, attestation engagements, and other studies related to the audit objectives and whether related recommendations have been implemented.
19. The District has no plans or intentions that may materially affect the carrying value or classification of assets, liabilities, deferred inflows/outflows of resources, or equity.
20. We are responsible for compliance with the laws, regulations, and provisions of contracts and grant agreements applicable to us, including tax or debt limits and debt contracts; and legal and contractual provisions for reporting specific activities in separate funds.
21. We have identified and disclosed to you all instances, which have occurred or are likely to have occurred of fraud and noncompliance with provisions of laws and regulations that we believe have a material effect on the financial statements or other financial data significant to the audit objectives, and any other instances that warrant the attention of those charged with governance.
22. We have identified and disclosed to you all instances, which have occurred or are likely to have occurred, of noncompliance with provisions of contracts and grant agreements that we believe have a material effect on the determination of financial statement amounts or other financial data significant to the audit objectives.
23. We have identified and disclosed to you all instances that have occurred or are likely to have occurred, of abuse that could be quantitatively or qualitatively material to the financial statements or other financial data significant to the audit objectives.
24. There are no violations or possible violations of budget ordinances, laws and regulations (including those pertaining to adopting, approving, and amending budgets), provisions of contracts and grant agreements, tax or debt limits; and any related debt covenants whose effects should be considered for disclosure in the financial statements, or as a basis for recording a loss contingency, or for reporting on noncompliance.
25. As part of your audit, you assisted with preparation of the financial statements and related notes. We acknowledge our responsibility as it relates to those nonaudit services, including that we assume all management responsibilities; oversee the services by designating an individual, preferably within senior management, who possesses suitable skill, knowledge, or experience; evaluate the adequacy and results of the services performed; and accept responsibility for the results of the services. We have reviewed, approved, and accepted responsibility for those financial statements and related notes.
26. The District has satisfactory title to all owned assets, and there are no liens or encumbrances on such assets nor has any asset been pledged as collateral.
27. The District has complied with all aspects of contractual agreements that would have a material effect on the financial statements in the event of noncompliance.

28. We have followed all applicable laws and regulations in adopting, approving, and amending budgets.
29. The financial statements include all component units as well as joint ventures with an equity interest, and properly disclose all other joint ventures and other related organizations.
30. The financial statements properly classify all activities, in accordance with GASB Statement No. 34.
31. Components of net position (net investment in capital assets, restricted, and unrestricted) are properly classified and, if applicable, approved.
32. Expenses have been appropriately classified in or allocated to functions and programs in the statement of revenues, expenses and changes in net position, and allocations have been made on a reasonable basis.
33. Revenues are appropriately classified in the statement of revenues, expenses and changes in net position within operating and nonoperating revenues.
34. Deposits and investment securities and derivative transactions are properly classified as to risk and are properly disclosed.
35. Joint ventures, jointly governed organizations, and other related organizations have been properly disclosed in the financial statements.
36. We have appropriately disclosed the District's policy regarding whether to first apply restricted or unrestricted resources when an expense is incurred for purposes for which both restricted and unrestricted net position is available and have determined that net position is properly recognized under the policy.
37. Receivables recorded in the financial statements represent valid claims against debtors for transactions arising on or before the balance sheet date and have been reduced to their estimated net realizable value.
38. We have evaluated and classified any subsequent events as recognized or nonrecognized through the date of this letter. No events, including instances of noncompliance, have occurred subsequent to the balance sheet date and through the date of this letter that would require adjustment to or disclose in the aforementioned financial statements or in the schedule of findings and questioned costs.

Signed:   
Tony Salcerman, City of Appleton  
Finance Director

Signed:   
Jennifer Stephany, City of Appleton  
BID Executive Director