



# City of Appleton

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

## Meeting Agenda - Final Joint Review Board

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Wednesday, August 11, 2021

1:00 PM

Council Chambers, 6th Floor

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### Outagamie County

1. Call meeting to order
2. Roll call of membership
4. **Public Hearings/Apearances**
5. **Action Items**
  - [21-1109](#) Election of Public Member
6. **Information Items**
  - [21-1102](#) Review Role of the Joint Review Board
    - Attachments:** [WI DOR Tax Incremental Financing Manual Pgs 24-27.pdf](#)
  - [21-1103](#) Review and Discuss Tax Incremental District No. 3 and Tax Incremental District No. 12 Project Plan Amendments
    - Attachments:** [TID No. 3 Amendment #2 FINAL Project Plan June29.2021.pdf](#)
    - [TID No. 12 Amendment #1 FINAL Project Plan June29.2021.pdf](#)
  - [21-1104](#) Review 2020 Annual Reports for Tax Incremental Financing Districts #3, 8, 9, 10, 11 and 12 (those within Outagamie County)
    - Attachments:** [TID 3-Annual Report-2020.pdf](#)
    - [TID 8-Annual Report-2020.pdf](#)
    - [TID 9-Annual Report-2020.pdf](#)
    - [TID 10-Annual Report-2020.pdf](#)
    - [TID 11-Annual Report-2020.pdf](#)
    - [TID 12-Annual Report-2020.pdf](#)
    - [2020 City of Appleton Growth Report.pdf](#)
  - [21-1105](#) Set Next Meeting Date

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.*

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

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

If a municipality does not e-file this report within the specified timeframe, it will delay the certification of future TIDs. For more details on termination reporting, review (sec. [66.1105\(8\)\(c\)](#), Wis. Stats.).

## Final Accounting Report must show either:

- Increment revenue paid all project costs and the TID account has a surplus. The municipality must return the excess increments to the overlying taxing jurisdictions in proportion to the amounts that belong to each taxing jurisdiction.
- Increment revenue did not cover the project costs and the TID account has a deficit. The municipality is responsible for paying the remaining debt.

The final TID account balance must be zero either after the surplus is distributed or after the municipality pays the remaining debt.

## III. Joint Review Board (JRB)

### A. JRB Purpose

State law provides for a JRB and defines its members and responsibilities. JRB members represent a taxing jurisdiction (municipality, county, school, technical college). It is the JRB's responsibility to approve or deny the creation or amendment of a Tax Incremental District (TID). If the JRB approves the TID, it viewed or heard convincing evidence of the need for Tax Incremental Financing (TIF) assistance to make the development a reality. The JRB jurisdictions agree to sacrifice some amount of tax revenue for many years into the future expecting the tax base will ultimately increase.

### B. JRB Members

The JRB consists of one representative from each taxation jurisdiction (school district, technical college, county, municipality), and one public member.

#### District representatives

- **School** – the school board president, or their designee with preference to the school district's finance director. If the TID is located in a union high school district, the school seat is shared by the union high school representative and school district representative; each having one-half vote.
- **Technical college** – the technical college district director, or their designee with preference to the district's chief financial officer
- **County** – the county executive or the county board chairperson, or this person's designee with preference to the county treasurer
- **City/village/town** – the mayor or city manager, the village board president, town board chairperson or their designee with preference to the person who administers the economic development programs, the municipal treasurer or another person with knowledge of local government finances
- **Public member** – a majority of the other members chooses the public member at the JRB's first meeting. State law has no requirements for the public member. A public member can be appointed as chairperson. For a multijurisdictional TID, each participating municipality may appoint one public member.

If more than one school, union high school, technical college or county district has the power to levy taxes on the property within the TID, the district with the greatest **value** chooses the representative to the JRB.

#### Examples:

- School District "A" serves 75 percent of the area in the TID, but only has 40 percent of the TID value. School District "B" serves 25 percent of the area in the TID but has 60 percent of the TID value. District "B" chooses the JRB member.

- In the case of a territory amendment, if adding property from one county to an existing TID in a different county, the county with the majority value chooses the JRB member. The calculation to determine majority value is the existing base value plus the additional parcels' current value.

## C. JRB Procedures

### 1. Organize the JRB

- When creating a TID, the municipality must send the overlying taxing districts a letter with a copy of the public hearing notice (by first class mail before the notice is published) to request a representative to serve on the JRB for that TID
- Within 14 days after the public hearing notice is published and before the public hearing for a TID creation, all JRB members must be appointed and the first organizational meeting held. At the organizational meeting, the members must select a public member and chairperson by majority vote. They may also review details of the new TID.
- Any JRB member may request additional JRB meetings or public hearings
- At all JRB meetings, one of the members must take minutes and record votes. The municipality is responsible for keeping these TID records.
- The municipality must publish a notice for any JRB meeting at least five days before the meeting, under state law (ch. 985 and sec. 66.1105(4m)(e), Wis. Stats.). This does not apply to town TIDs created under sec. 60.85, Wis. Stats. or Environmental Remediation TIDs created under sec. 66.1106, Wis. Stats.

### 2. The JRB must approve or deny the resolution

- After receiving the municipal resolution, the JRB must meet again to vote on the resolution:
  - » **Within 45 days** – City/Village TIDs created under sec. 66.1105, Wis. Stats.
  - » **Between 10 days and 45 days** – Town TIDs created under sec. 60.85, Wis. Stats. or Environmental Remediation TIDs created under sec. 66.1106, Wis. Stats.
- The JRB adopts its own resolution to document its decision based on the three criteria required in state law

### 3. After the JRB resolution is adopted

- JRB must respond to municipal officials within seven days of its decision
- If the JRB rejects a resolution, the JRB must explain in writing why the proposal did not meet the decision criteria

## D. JRB Document Review

The municipality must provide the JRB with specific information under state law (secs. 66.1105(4)(i), 60.85(3)(k), and 66.1106(3)(b), Wis. Stats.). JRB members may request missing or additional information.

### 1. Required information the municipality must provide

- Specific projects and costs, including the amounts expected to be paid by tax increments and the estimated tax increments over the life of the TID
- Value increment after project costs are paid and the TID terminates
- Reasons why the property owners benefitting from the improvements within the TID should not pay the project costs
- Share of the projected tax increments estimated to be paid by the property owners in each of the overlying taxing jurisdictions
- Benefits the taxpayers will receive to compensate for their share of the projected tax increments



## 2. Additional information the JRB must review (sec. [66.1105\(4m\)\(b\)1.](#), Wis. Stats.)

- **Public records** – copies of the public hearing minutes and notices
- **Planning documents** – copies of the project plan and signed development agreement, if applicable
- **Resolutions** – copies of the Planning Commission and municipal resolutions

## 3. Additional information the JRB may request

- **Economic feasibility study** – detailing the projected tax increments and estimates of increased property values
- **For multijurisdictional TIDs** – copy of the signed intergovernmental agreement created under state law (sec. [66.0301](#), Wis. Stats.). The agreement must provide the specific information listed in sec. [66.1105\(18\)\(b\)](#), Wis. Stats.

## E. JRB Decision Criteria

The JRB must make a decision based on the documents and information provided by the municipality and three criteria found in state law (secs. [66.1105\(4m\)\(c\)](#), [66.1106\(3\)\(c\)](#), and [60.85\(4\)\(c\)](#), Wis. Stats.). The JRB must determine whether the:

1. Development expected in the TID would occur without the use of TIF ("but for" requirement)
2. Economic benefits of the TID, as measured by increased employment, business and personal income and property value, are sufficient to compensate for the cost of the improvements
3. Benefits of the proposal outweigh the anticipated tax increments to be paid by the property owners in the overlying taxing jurisdictions

Each criterion is important to ensure the TIF project is beneficial for all taxpayers in the overlying taxing jurisdictions. Many consider the first criterion, the "but for" requirement, the most important. "But for" gets its name from the phrase, "This development would not happen but for the financial support of TIF." This means the project is not economically viable without the use of TIF to pay for the infrastructure improvements. Review [But for Requirement](#) for more information.

## Questions to consider

1. Would the expected development occur without ("but for") the use of TIF? Would the development occur if the project was scaled back or the timeframe pushed out? Did similar projects proceed without the use of TIF?
2. Will the development's economic benefits measured by increased employment, business and personal income and property value, compensate for the cost of the improvements?
3. Do the benefits outweigh the taxes residents of overlying districts are expected to pay?
4. How does the planned development fit into the overall economic picture in the district? How does the development fit with other development in the district? Will the potential businesses benefit the district in the long term? How many and what type of jobs will this development create?
5. How does the TID benefit taxpayers in my district? Is the total expenditure for eligible project costs feasible?
6. Is there a better use for the development site, the tax revenue and the limited TIF capacity?
7. What is the general opinion of my district's residents on this TID?
8. How will the planned development affect the demand for services in my district? Consider items such as: increased population, traffic impact, fire and police protection, emergency medical services, water, sewer, administrative services, increased student population, demand for training or housing.
9. Is the developer receiving a subsidy, such as a cash grant, incentive or forgivable loan? If so, how was the need and benefit analyzed? Is there a written developer's agreement? Was the public informed of the developer's subsidy in the published hearing notice?
10. What guarantees are in place to ensure the development will occur as anticipated and the property value will increase as expected?

## F. DOR Review Procedure

Under state law (sec. [66.1105\(4m\)\(b\)4](#), Wis. Stats.), the JRB may request DOR review the facts contained in the documents listed in [Additional information the JRB must review](#).

### 1. To request a DOR review

- Majority of the JRB members must support the request
- JRB must submit a written request to DOR and must specify which fact or item the members believe is inaccurate or incomplete
- Within 10 working days of receiving a request for review that complies with the filing requirements, DOR will investigate the issues raised and send a written response to the JRB
- Review [JRB Request for DOR Review](#) for more information

### 2. DOR review

- If DOR determines the information does not comply with state law or contains a factual inaccuracy, the JRB may request (but may not require) that the municipality correct and resubmit the proposal for review
  - » **If the municipality resubmits the proposal** – the JRB must vote to approve or reject under state law. The JRB must submit its decision to the municipality within 10 working days after receiving the resubmitted proposal.
  - » **If the municipality does not resubmit the proposal** – the TID is not certified
- If DOR does not identify any factual inaccuracies, the JRB must vote to approve or reject as otherwise specified in state law. The JRB must submit its decision to the municipality within 10 working days of receiving DOR's written response.

## G. After the JRB approves a TID

- Municipality sends DOR a request to certify the TID and includes all the required documents. If DOR determines procedures were followed, DOR will email the municipality a certification letter.
- While the TID is active, the JRB must meet yearly to review the annual performance and status of the TID based on the annual report (sec. [66.1105\(4m\)\(f\)](#), Wis. Stats.)

## IV. Wisconsin Department of Revenue Responsibilities

### A. Statutory Responsibilities

The Wisconsin Department of Revenue (DOR) has multiple responsibilities assigned by state law in administering Tax Incremental Districts (TIDs). These duties, include:

#### 1. Determine property values

Establishing the Equalized Value of property throughout the state is one of DOR's primary responsibilities. Equalized Value is an estimate of the total value subject to property tax in a district. DOR calculates the Equalized Value independently of the value estimate by the local assessor. DOR uses Equalized Values to calculate a TID's base value when it is created and to adjust the base value due to a territory addition or subtraction. For more details on determining a Tax Incremental Base, review sec. [66.1105\(2\)\(j\)](#), Wis. Stats.

When certifying a new TID, state law requires DOR to use the most recent Equalized Values as of the creation year. Based on the documents provided by the municipality, DOR determines the total Equalized Value of the taxable property in the TID. This valuation sets the district's tax incremental base. DOR provides the municipal clerk the certification letter with the base value. For more details on TID base certification, review sec. [66.1105\(5\)\(b\)](#), Wis. Stats.

June 29, 2021

# Tax Incremental District No. 3 Project Plan Amendment #2



Organizational Joint Review Board Meeting Held:	Scheduled for August 11, 2021
Public Hearing Held:	Scheduled for August 11, 2021
Adoption by Plan Commission:	Scheduled for August 11, 2021
Adoption by Common Council:	Scheduled for August 18, 2021
Approval by the Joint Review Board:	TBD

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## SECTION 1:

# Executive Summary

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### Description of District

Tax Incremental District (“TID”) No. 3 (“District”) is a blighted area district created by the City on November 4, 1992. In accordance with its Project Plan (“Plan”), the objectives for the District were to stimulate downtown and commercial development, to expand the property tax base and employment opportunities, and to reduce blight in the downtown retail area. On August 3, 2011, the District was designated as distressed as permitted under Wis. Stat. § 66.1105(4e) which extended the expiry of its maximum life by ten years until November 4, 2029. This extension did not lengthen the District’s expenditure period, which terminated on November 4, 2014. The distressed designation was sought following a \$15.4 million decrease in the District’s valuation from 2009 to 2010 resulting from the Department of Revenue’s implementation of a new valuation methodology, and a loss of valuation in the Richmond Terrace project following a bankruptcy sale. As of January 1, 2020, the District had an incremental valuation of \$58,719,700. The District’s remaining liabilities include an advance from the City’s General Fund, which is projected to be repaid in 2023, and payments due to the City’s Parking Utility which are expected to run through the remaining life of the District. On August 19, 2020, Council approved the first amendment to TID No. 3, removing undervalued parcels and adding them to TID No. 11.

### Amendment Purpose

The City has identified 13 parcels within the District that continue to have redevelopment potential. Since the District’s expenditure period has passed, the City is unable to incur further Project Costs to promote redevelopment on those sites. This Plan Amendment will subtract these 13 parcels from the District as permitted under Wis. Stat. § 66.1105(4)(h)2. By separate amendment to Tax Incremental District No. 12 (“TID No. 12”), the City will add the same 13 parcels to that district, which has an active expenditure period through August 2, 2039. This will allow the City to promote further redevelopment in the downtown area in furtherance of the objectives of both TIDs No. 3 and 12. The effective date of the subtraction for valuation purposes will be January 1, 2021, first impacting the 2022 levy for the 2023 budget year.

Other than the subtraction of territory from the District, this Plan Amendment makes no further changes to the District or its Plan. Due to the subtraction of certain underperforming parcels, the territory subtraction is expected to slightly increase the incremental value of the District by a net amount of \$19,670. At the present tax rate, the annual revenue increase to the District will be approximately \$400, or \$3,200 over the remaining life of the District. As the District is currently projected to remain open for the balance of its remaining life, the removal of territory will not impact closure, but will instead slightly increase the funds available for repayments to the Parking Utility.

### Summary of Findings

As required by Wis. Stat. § 66.1105, and as documented in this Plan Amendment and the exhibits contained and referenced herein, the following findings are made:

1. **That “but for” this Plan Amendment: 1) the City’s economic development objectives for the District will not be achieved; and 2) additional potential development within the District may not occur in the manner, at the values, or within the timeframe desired by the City.** In evaluating the appropriateness of this Plan Amendment, the Joint Review Board must consider “whether the development expected in the tax incremental district would occur without the use of tax incremental financing” customarily referred to as the “but for” test. Since the purpose of this Plan Amendment is solely to subtract territory, this test cannot be applied in the conventional way. The Joint Review Board has previously concluded that the “but for” test was met with respect to the District. Accordingly, the City finds that it is reasonable to conclude the “but for” test continues to be satisfied.

2. **The economic benefits of amending the District, as measured by increased employment, business and personal income, and property value, are sufficient to compensate for the cost of the improvements.** As a result of the Project Costs made within the District, \$58,719,700 in incremental property value has been created. While not quantified, increased employment, business and personal income, and other economic benefits have resulted from the redevelopment that has occurred within the District.
3. **The benefits of the proposal outweigh the anticipated tax increments to be paid by the owners of property in the overlying taxing jurisdictions.** Given the Joint Review Board has previously concluded the benefits of the District outweigh the anticipated tax increments to be paid by the owners of property in the overlying taxing jurisdictions, the City finds that it is reasonable to conclude that this test continues to be satisfied.
4. Not less than 50% by area of the real property within the District, as amended, was a blighted area within the meaning of Wis. Stat. § 66.1105(2)(a)(e)1 at the time the District was created.
5. Based on the foregoing finding, the District is declared to be, and remains, a blighted area district based on the identification and classification of the property included within the District.
6. The District's Project Costs, which remain unchanged, relate directly to promoting the elimination of blight.
7. No territory will be added to the District. Demonstration of compliance with the 12% equalized value test is, therefore, not required for this Plan Amendment.
8. Improvements to be made in the District are likely to significantly enhance the value of substantially all of the other real property in the District
9. The Plan for the District is feasible and is in conformity with the Master Plan of the City.
10. That based on the District's creation date, the City was not required to provide an estimate of the percentage of territory within the District expected to be devoted to retail business at the end of the District's maximum expenditure period, pursuant to Wis. Stat. § 66.1105(5)(b).

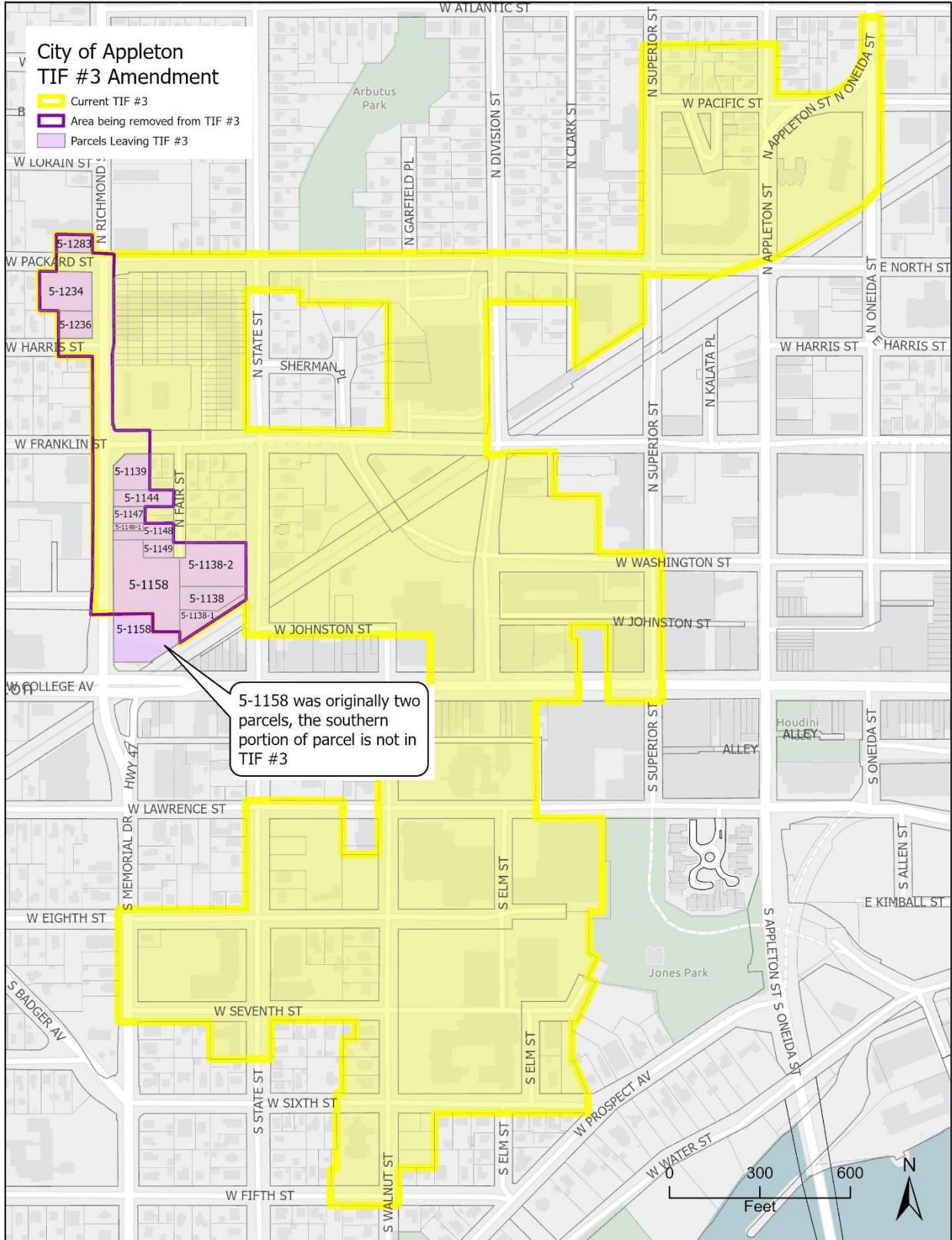
## **SECTION 2:**

# District Boundary Map & Identification of Parcels to be Subtracted

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Map Found on Following Page.







### SECTION 3:

## Identification of Parcels to be Subtracted

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The purpose of this Plan Amendment is to remove the parcels identified in the table below from the District effective January 1, 2021. The parcel subtraction will reduce the District's base value by approximately \$1,058,970 and increase its incremental value by approximately \$19,670. The figures listed in the table reflect assessed values. The actual adjustments to the base and incremental value will be calculated by the Department of Revenue using equalized value. Furthermore, the figures listed under the "Current Value" column reflect valuations as of January 1, 2020. The actual reduction in incremental value will be based on January 1, 2021 valuations which are not yet available. The actual reductions in both the base and incremental valuation of the District will, therefore, vary from the estimates provided. The District's revised based and incremental values resulting from the removal of the listed parcels will first be reflected in the valuations certified for January 1, 2022.

<b>Parcel Number</b>	<b>Street Address</b>	<b>Base Value (Jan. 1, 1993)</b>	<b>Current Value (Jan. 1, 2021)</b>
5-1138	133 N STATE ST	\$ 97,400	\$ 0
5-1138-1	123 N STATE ST	\$ 0	\$ 0
5-1138-2	139 N STATE ST	SPLIT FROM 5-1138	\$ 0
5-1139	226 N RICHMOND ST	\$119,110	\$ 47,100
5-1144	N RICHMOND ST	\$ 37,710	\$ 66,200
5-1147	208 N RICHMOND ST	\$ 52,800	\$ 95,000
5-1148	200 N RICHMOND ST	\$106,300	\$120,000
5-1148-1	204 N RICHMOND ST	\$ 34,500	\$ 83,600
5-1149	139 N FAIR ST	\$ 32,500	\$ 59,000
5-1158	110 N RICHMOND ST	\$382,670	\$210,000
5-1234	N RICHMOND ST	\$ 93,800	\$169,200
5-1236	N RICHMOND ST	\$ 42,800	\$ 79,200
5-1283	501 N RICHMOND ST	\$ 59,380	\$110,000
<b>Totals</b>		<b>\$ 1,058,970</b>	<b>\$ 1,039,300</b>

## **SECTION 4:**

### **Map Showing Existing Uses and Conditions**

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Except for subtraction of territory, this Plan Amendment makes no changes to the map depicting existing uses and conditions of real property within the District as included in the original Project Plan for the District approved on November 4, 1992. That map is hereby incorporated by reference.

## **SECTION 5:**

### **Equalized Value Test**

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No territory will be added to the District. Demonstration of compliance with the 12% equalized value test is, therefore, not required for this Plan Amendment.

## **SECTION 6:**

### **Statement of Kind, Number and Location of Proposed Public Works and Other Projects**

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The District's expenditure period terminated on November 4, 2014; therefore, no additional Project Costs may be incurred. The Statement of Kind, Number and Location of Proposed Public Works and Other Projects set forth in the original Project Plan for the District approved on November 4, 1992 remains unchanged.

## **SECTION 7:**

### **Map Showing Proposed Improvements and Uses**

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Except for subtraction of territory, this Plan Amendment makes no changes to the maps depicting proposed improvements and uses within the District as included in the original Project Plan for the District approved on November 4, 1992. That map is hereby incorporated by reference.

## **SECTION 8:**

### **Detailed List of Project Costs**

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The District's expenditure period terminated on November 4, 2014; therefore, no additional Project Costs may be incurred. The Detailed List of Project Costs set forth in the original Project Plan for the District approved on November 4, 1992 remains unchanged.

## **SECTION 9:**

# **Economic Feasibility Study, Financing Methods, and the Time When Costs or Monetary Obligations Related are to be Incurred**

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The cash flow projection found on the following page reflects the District's current financial position and anticipated performance through the end of its maximum life. The District's expenditure period ended on November 4, 2014, and additional expenditures will be limited to repayment of existing obligations and direct administrative cost. Existing liabilities include an advance from the General Fund expected to be repaid by 2023, and payments owed to the City's Parking Utility, which will run through the District's final year in 2030.

**TAX INCREMENT DISTRICT #3  
CASH FLOW PROJECTION**

Valuation Year 1/1	Revenue Year	TIF District 3 Valuation*	Tax Rate	Tax Increment	Other Revenues	Admin Expense	Interest on Gen Fund Advance	Repayment to Parking Utility	Fund Balance	Repayment of General Fund Advance	Cash Balance
	2020								\$ (3,211,621)		\$ 130,806
2020	2021	77,660,500	20.7044	1,215,753	10,983	(1,460)	(139,621)	0	(2,125,966)	(1,100,000)	116,461
2021	2022	78,437,108	20.7044	1,231,835	13,000	(2,000)	(84,621)	0	(967,752)	(1,100,000)	174,675
2022	2023	79,221,476	20.7044	1,248,075	13,000	(2,000)	(28,560)	0	262,763	(1,142,427)	262,763
2023	2024	80,013,691	21.2190	1,264,478	13,000	(2,000)	0	(1,400,000)	138,241	0	138,241
2024	2025	80,813,828	21.2190	1,281,044	13,000	(2,000)	0	(1,300,000)	130,285	0	130,285
2025	2026	81,621,966	21.2190	1,297,776	13,000	(2,000)	0	(1,300,000)	139,061	0	139,061
2026	2027	82,438,186	21.2190	1,314,675	13,000	(2,000)	0	(1,300,000)	164,736	0	164,736
2027	2028	83,262,568	21.2190	1,331,744	13,000	(2,000)	0	(1,300,000)	207,480	0	207,480
2028	2029	84,095,193	21.2190	1,348,983	13,000	(2,000)	0	(1,400,000)	167,463	0	167,463
2029	2030	84,936,145	21.2190	1,366,394	13,000	(5,000)	0	(1,541,857)	0	0	0
				<u>\$ 12,900,757</u>	<u>\$ 127,983</u>	<u>\$ (22,460)</u>	<u>\$ (252,802)</u>	<u>\$ (9,541,857)</u>		<u>\$ (3,342,427)</u>	

\* A 1% valuation growth has been used for 2021 and beyond.

## **SECTION 10:**

### **Annexed Property**

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A tax incremental district cannot include annexed territory unless at least three years have elapsed since the annexation, or certain other requirements are met. No territory is being added to the District as part of this Plan Amendment

## **SECTION 11:**

### **Proposed Zoning Ordinance Changes**

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The proposed Plan Amendment is in general conformance with the City's current zoning ordinances. Individual properties may require rezoning at the time of development.

## **SECTION 12:**

### **Proposed Changes in Master Plan, Map, Building Codes and Ordinances**

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The proposed Plan Amendment is in general conformance with the City's Comprehensive Plan. Development within the District will be required to conform to State Building Codes and will be subject to the City's permitting and inspection procedures. The proposed Plan conforms to all relevant State and Local ordinances, plans, and codes. No changes to the existing regulations are proposed or needed.

## **SECTION 13:**

### **Relocation**

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The District's expenditure period terminated on November 4, 2014; therefore, no additional Project Costs, to include relocation costs, may be incurred.

## **SECTION 14:**

### **Orderly Development of the City**

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This original District Plan contributed to the orderly development of the City by promoting revitalization of blighted and transitional areas in the City's Downtown District. The District's expenditure period has past, and this Plan Amendment has no impact to the original District Plan regarding orderly development of the City.

## **SECTION 15:**

### **List of Estimated Non-Project Costs**

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Non-Project Costs are public works projects which only partly benefit the District. Costs incurred that do not benefit the District may not be paid with tax increments. Examples of non-project costs are:

- A public improvement made within the District that also benefits property outside the District. That portion of the total Project Costs allocable to properties outside of the District would be a non-project cost.
- A public improvement made outside the District that only partially benefits property within the District. That portion of the total Project Costs allocable to properties outside of the District would be a non-project cost.
- Projects undertaken within the District as part of the implementation of this Project Plan, the costs of which are paid fully or in part by impact fees, grants, special assessments, or revenues other than tax increments.

The District's expenditure period terminated on November 4, 2014; therefore, no additional Project Costs, or Non-Project Costs will be incurred.

**SECTION 16:**

**Opinion of Attorney for the City of Appleton Advising Whether the Plan is Complete and Complies with Wisconsin Statutes 66.1105**

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**LEGAL SERVICES DEPARTMENT**

**Office of the City Attorney**

100 North Appleton Street  
Appleton, WI 54911  
Phone: 920/832-6423  
Fax: 920/832-5962

June 28, 2021

Mayor Jacob A. Woodford  
City of Appleton  
100 North Appleton Street  
Appleton, WI 54911-4799

Re: Tax Increment Finance Program Plan, City of Appleton  
Tax Incremental District #3

Dear Mayor Woodford:

You have asked me for a legal opinion as to the legal sufficiency and statutory compliance of the proposed Tax Incremental Financing District #3 Project Plan Amendment (amendment #2) for the City of Appleton Tax Incremental District #3. I have reviewed the second Project Plan Amendment for said District as well as the appendices attached thereto, specifically as to their compliance with the provision of Section 66.1105(4), Wisconsin Statutes. It is my opinion that the Project Plan Amendment is in compliance with all of the provisions of Section 66.1105(4) of the Wisconsin Statutes dealing with the creation of Tax Incremental Financing Districts.

If you have any questions concerning this matter, please contact me at your earliest convenience.

Sincerely,

Christopher R. Behrens  
City Attorney

CRB:jljg

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Christopher R. Behrens  
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## **SECTION 17:**

# Calculation of the Share of Projected Tax Increments Estimated to be Paid by the Owners of Property in the Overlying Taxing Jurisdictions

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The scope of this Plan Amendment makes no changes to the calculations prepared and included in the original District Project Plan approved on November 4, 1992. Those calculations are hereby incorporated by reference.



June 29, 2021

# TAX INCREMENTAL DISTRICT No. 12 PROJECT PLAN AMENDMENT #1



Organizational Joint Review Board Meeting Held:	Scheduled for August 11, 2021
Public Hearing Held:	Scheduled for August 11, 2021
Adoption by Plan Commission:	Scheduled for August 11, 2021
Adoption by Common Council:	Scheduled for August 18, 2021
Approval by the Joint Review Board:	TBD
Expenditure Deadline:	August 2039 (22 Years)
TID Expiration Date:	August 2044 (27 Years)

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## Section 1: Executive Summary

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### Description of District

Tax Incremental District (“TID”) No. 12 (“District”) was created by the City on August 2, 2017 under the authority provided by Wisconsin Statute Section 66.1105 “Tax Increment Law”. In accordance with its Project Plan (“Plan”), the objectives for the District are to eliminate blight and stimulate the rehabilitation, conservation and redevelopment of this urban corridor located on West College Avenue from the east side of Story Street to the west side of Walnut Street as well as Memorial Drive/Richmond Street from the north side of Lawrence Street to the south side of Elsie Street (excluding the east side of the 400 block of Richmond Street that contains the gas station and Richmond Terrace). A map of the proposed District boundaries is found in Section 3. A complete description of the District, individual development areas, and objectives related to those areas can be found in Section 2 of this Plan.

### Amendment Purpose

The City has identified 13 undervalued and high re-development parcels within Tax Incremental District No. 3 (TID No. 3) comprising an area that continues to have redevelopment potential. Since TID No. 3’s expenditure period has passed, the City is unable to incur further Project Costs within this area. This Plan Amendment will add these 13 parcels to the District as permitted under Wis. Stat. § 66.1105(4)(h)2. Twenty-three (23) additional parcels not presently located within TID No. 3 will also be added to the District as part of this Plan Amendment. This will allow the City to promote further redevelopment in the downtown area in furtherance of the objectives of both TIDs No. 3 and 12. The effective date of the territory additions for valuation purposes will be January 1, 2021. The Plan also sets forth additional Project Costs the City may incur within the District and the territory being added to the District.

### Summary of Findings

As required by Wis. Stat. § 66.1105, and as documented in this Plan Amendment and the exhibits contained and referenced herein, the following findings are made:

1. **That “but for” this Plan Amendment: 1) the City’s economic development objectives for the District will not be achieved; and 2) additional potential development within the District may not occur in the manner, at the values, or within the timeframe desired by the City.** Development Areas identified in this Plan Amendment contain various impediments to redevelopment including obsolete structures, structures requiring substantial renovation, substandard access, and inadequate parking. Due to the additional development costs associated with brownfield redevelopment such as demolition, remediation and provision of off-street parking, Tax Incremental Financing (“TIF”) is often required to make a project economically feasible. Without use of TIF, redevelopment projects that the City wants to encourage are unlikely to attract needed private investment capital. It is therefore the City’s judgment that “but for” the use of TIF within the District and the territory to be added, that redevelopment is not likely to occur in the manner, at the values, or within the timeframe desired by the City. Since the District includes various potential Development Areas, the City will evaluate specific projects as they are proposed regarding any requested TIF assistance.

2. **The economic benefits of amending the District, as measured by increased employment, business and personal income, and property value, are sufficient to compensate for the cost of the improvements.** Beyond the expected increase in incremental property value, development within the District will result in short-term employment opportunities as a result of both public and private construction, as well as long-term employment opportunities resulting from commercial and retail operations that will locate in or be retained within the District. Implementation of the Plan Amendment will also provide housing opportunities, and commercial enterprise providing goods and services to workers and residents in the area. The City expects that the level of economic benefit derived from implementing the amended Plan will be more than sufficient to compensate for the Project Costs to be undertaken.
3. **The benefits of the proposal outweigh the anticipated tax increments to be paid by the owners of property in the overlying taxing jurisdictions.** As identified in 2. above, the economic benefits of the Plan Amendment are expected to more than compensate for the Project Costs. These same benefits will be enjoyed by taxpayers of all overlying taxing jurisdictions. The City finds that the benefits of the Plan Amendment similarly outweigh the cost of the anticipated tax increments to be paid.
4. Not less than 50% by area of the real property within the District, as amended, is a blighted area within the meaning of Wis. Stat. § 66.1105(2)(ae)1. The District was created as a Rehabilitation District and at least 50% by area of real property within the District is blighted and/or in need of rehabilitation and/or conservation work within the meaning of Wisconsin State Statutes 66.1337 (2m) (a).
5. Based on the foregoing finding, the District is declared to be, and remains, a blighted rehabilitation area district based on the identification and classification of the property included within the District.
6. The District's Project Costs relate directly to promoting the elimination of blight and rehabilitation.
7. The equalized value of the taxable property within the territory to be added to the District, plus the value increment of all other existing tax incremental districts within the City, does not exceed 12% of the total equalized value of taxable property within the City.
8. Improvements to be made in the District are likely to significantly enhance the value of substantially all of the other real property in the District
9. The Plan for the District is feasible and is in conformity with the Master Plan of the City.
10. The City estimates that 10% of the territory within the District will be devoted to retail business at the end of the District's maximum expenditure period, pursuant to Wis. Stat. § 66.1105(5)(b).

## ***Section 2: Intent and Purpose of District and the Amendment***

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Tax Incremental District (“TID”) No. 12 (“District”) was created by the City of Appleton under the authority provided by Wis. Stat. § 66.1105 as a Rehabilitation & Conservation TIF District per State Statute 66.1337 (2m)(a). The intent and purpose of the district is to eliminate blight and stimulate the rehabilitation, conservation and redevelopment of this urban corridor located on West College Avenue from the east side of Story Street to the west side of Walnut Street as well as Memorial Drive/Richmond Street from the north side of Lawrence Street to the south side of Elsie Street (excluding the east side of the 400 block of Richmond Street that contains the gas station and Richmond Terrace). This area is primarily characterized by a large vacant parking lot, commercial building, a mixture of small and medium retail, office, service and hospitality businesses, which have the potential to, and in some cases already have, created a blighting influence on the surrounding area. While several property owners have made significant investment in the area, there are still numerous blighted properties that hamper further investment. The original District consisted of approximately 23 acres of land with the vast majority zoned Central Business District. This Amendment will add approximately 12 acres of land to the District.

The District is being created as a “Rehabilitation District” based upon the finding that at least 50%, by area of the real property within the District, is blighted and/or is in need of rehabilitation and/or conservation work within the meaning of Wisconsin Statute Section 66.1337 “Urban Renewal” described below. Some properties identified as rehabilitation or conservation may not experience any redevelopment or conservation activities during the TIF lifetime, while others not identified may experience redevelopment activities due to inclusion in the District. The identification of properties considered in need of rehabilitation or conservation work does not compel the City, or private landowners, to undertake public or private improvement projects specific to that location. 62 of the 95 properties in the amended area (Development Areas #1 and #5) of the District have been identified as in need of rehabilitation or conservation. These parcels represent approximately 69% of the total amended District area, excluding right-of-way. The map exhibit found in Section 5 illustrates existing uses and conditions of the District.

Rehabilitation or conservation work includes any of the following:

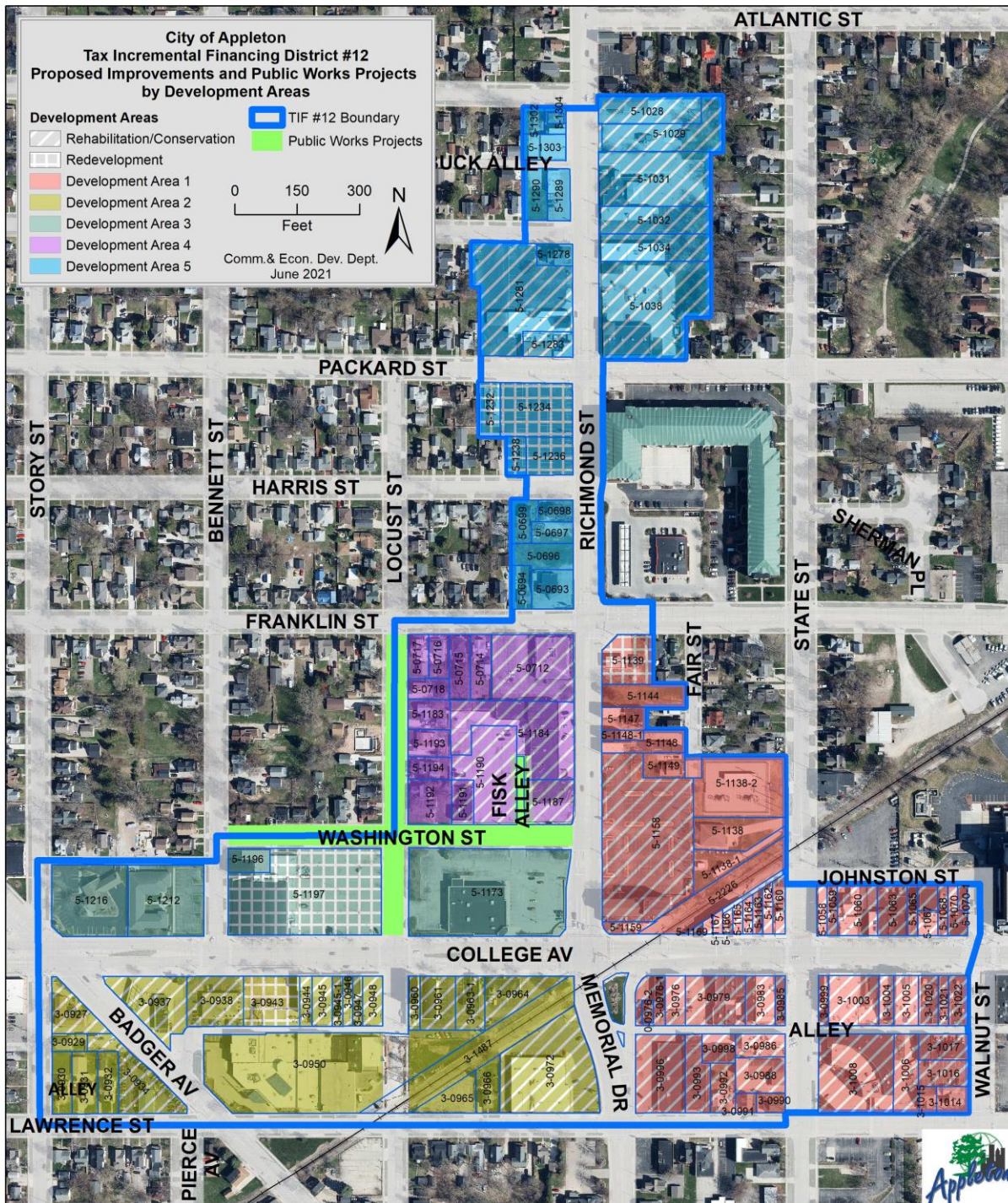
1. Carrying out plans for a program of voluntary or compulsory repair and rehabilitation of buildings or other improvements.
2. Acquisition of real property and demolition, removal or rehabilitation of buildings and improvements on the property where necessary to eliminate unhealthful, unsanitary or unsafe conditions, lessen density, reduce traffic hazards, eliminate obsolete or other uses detrimental to the public welfare, to otherwise remove or prevent the spread of blight or deterioration, or to provide land for needed public facilities.
3. Installation, construction or reconstruction of streets, utilities, parks, playgrounds, and other improvements necessary for carrying out the objectives of the urban renewal project.
4. The disposition, for uses in accordance with the objectives of the urban renewal project, of any property acquired in the area of the project. The disposition shall be in the manner prescribed in this section for the disposition of property in a redevelopment project area.

This Project Plan outlines the City of Appleton's role in assisting with the rehabilitation and conservation of existing properties and business as well as redevelopment of vacant, blighted, and underutilized properties as needed to support the urban renewal of this area. The investment in this District will:

- eliminate blight and foster urban renewal through public and private investment
- enhance the development potential of private property within and adjacent to the District
- stabilize property values in the area
- promote retention, expansion, attraction and reuse through the development of an improved area thereby facilitating the creation of new jobs and increased tax base
- improve the overall appearance of public and private spaces
- strengthen the economic well-being and economic diversity of the area
- provide appropriate financial incentives to encourage business expansion
- maximize the Districts strategic location in Appleton's Downtown and easy access to U.S. Interstate 41.

There are five identified development areas within the District that include a combination of redevelopment and rehabilitation sites. The following map and narrative highlight the key development areas targeted for rehabilitation/conservation as well as redevelopment in this District that would not happen otherwise but for the creation of this District.







**Development Area #1:** This Development Area comprises approximately 11.4 acres of the approximate 35 acre TIF District and is predominately home to independent businesses in the retail, personal and professional services, hospitality and financial industries. Buildings dating back to 1870 through the 1980s provide a mixture of architectural styles and aesthetic characteristics. See pictures below of the College Avenue portion of this Development Area. There are also about 82 housing units located in this Development Area.

While several businesses have committed significant time and financial investment into improving and maintaining their properties in Development Area #1, there are also a substantial number of properties that are for sale or lease, vacant, or in need of property maintenance. Conservation of the existing businesses is also critical to the economic vitality of this corridor. Many of these properties have and will continue to benefit from Property Improvement Grants to mitigate the deteriorated conditions and improve the overall economic vitality and appearance of the corridor.

The Amendment Project Plan adds a total of 10 parcels to this development area. 8 parcels were previously in TIF #3 and consist of a large parking lot, WE Energies electrical station, an old gas station and commercial properties that are vacant and/or where rehabilitation of the existing buildings and properties would further enhance the entire area. The two 2 additional parcels consist of railroad right of way and Good Company’s building.

- **200 NORTH Richmond Street (East) Block**



- **500 WEST College Avenue (North) Block**



- **500 WEST College Avenue (South) Block**





- **600 WEST College Avenue (North) Block**



- **600 WEST College Avenue (South) Block**



**Development Area #2:** This Development Area comprises approximately 7.5 acres of the approximately 35 acre TIF District and is home to a variety of independent businesses, several houses, public services and a youth community center. The businesses include retail, personal and professional services, hospitality and automotive sales and repair. The buildings date back to 1894 and include a variety of architectural styles and aesthetic characteristics. See below for pictures of the College Avenue properties in this Development Area. Prior to the original creation of TIF #12, the most recent construction projects included the expansion of the Boys & Girls Club in 2010. Since the creation of TIF #12, this area has seen the rehabilitation of the 800 block of West College Avenue in 2020. Block 800 is a mixed use project that added commercial/retail space and 20 apartments with one, two and three bedroom options with underground parking and a patio on the top floor. Additionally, 741 W. College Avenue, a Quonset hut building purchased at a Sheriff Sale, utilized a Business Enhancement Grant to rehabilitate exterior portions of the property.

Several properties remain vacant in this area and rehabilitation of the existing buildings and properties would further enhance the entire area. Since this entire area is also highly visible and an integral part of the Downtown, this Development Area would benefit from increased commercial activity. Redevelopment of the blighted and vacant properties in this Development Area would further benefit, and potentially induce, investment in parcels located surrounding and in close proximity to this area. Conservation of the existing businesses is also critical to the economic vitality of this corridor. Many of these properties have and will benefit from Property Improvement Grants to mitigate the deteriorated conditions and improve the overall appearance of the corridor with 18 of the 25 properties identified as in need of rehabilitation, conservation or redevelopment.

- **700 WEST College Avenue (South) Block**



- **800 WEST College Avenue (South) Block**



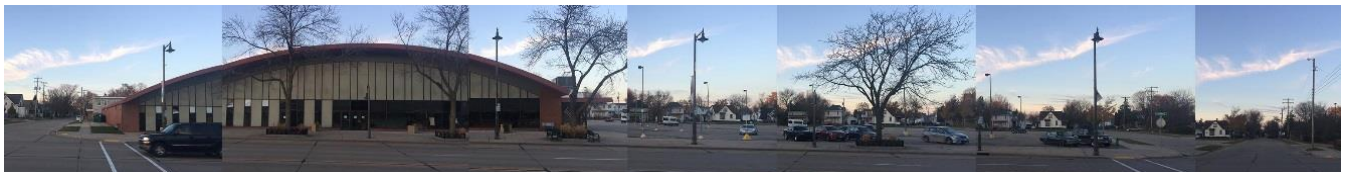
- **900 WEST College Avenue (South) Block**



**Development Area #3:** This Development Area comprises about 5 acres of the approximately 35 acre TIF District and includes several large buildings. Most of the buildings are relatively recent in their construction, from the Capital Credit Union’s building in 1989 to Walgreens in 2000. When TIF #12 was originally created, the Thompson Center located at 820 W. College Avenue, built in 1972 was vacant. As the largest building in this Development Area at over 23,500 square feet, the site was negatively impacting other properties, had deteriorating property conditions, was not aesthetically pleasing, and needed to be rehabilitated or redeveloped to enhance the overall economic vitality of the area and provide a positive impression for those travelling this corridor. Conservation of the existing businesses is also critical to the economic vitality of this corridor. In September 2020, The Core church moved into the renovated site. It is a contemporary church affiliated with St. Peter Lutheran Church in Freedom and 922 Ministries. This project was not eligible for TIF support due to its property tax exemption.

This Development Area is highly visible and a primary gateway into the City of Appleton and Appleton’s Downtown. Redevelopment of this site would further benefit, and potentially induce investment in parcels located surrounding and in close proximity to this site/area.

- **800 WEST College Avenue (North) Block**



- **900 WEST College Avenue (North) Block**

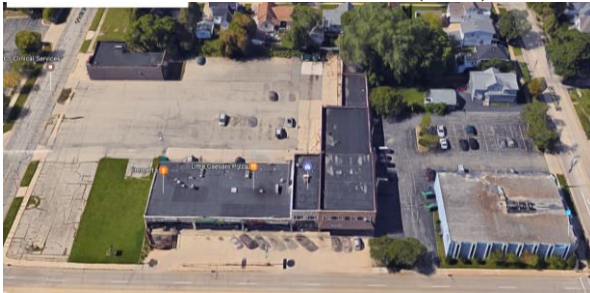


**Development Area #4:** This Development Area comprises just over 4 acres of the approximately 35 acre TIF District and includes a commercial center with storage units and office building among a couple vacant parcels and single-family homes. The commercial center was built in 1961, and the blue office building at the corner of Richmond and Franklin Streets was built in 1969. Access to the commercial center site can be challenging with the high volume of traffic on Richmond Street, and parking is a challenge as there are a limited number of stalls in the front of the building despite the substantial parking lot behind. The unit on the north end of the center has remained vacant for years. The vacant and underutilized parcels at the corner of Washington Street and Richmond Street present a deteriorated condition in this area. With the original creation of TIF #12, this vacant parcel was redeveloped into Evergreen Credit Union which opened early 2021. This entire corridor is a high visibility route into Downtown Appleton. Rehabilitation of the existing buildings and conservation of the businesses along with redevelopment of this blighted site would further enhance the entire area.

- **200 NORTH Richmond Street (West) Block**



- **100 – 200 NORTH Richmond Street (West) Block**



**Development Area #5:** This Development Area comprises approximately 7.7 acres of the approximately 35 acre TIF District and includes not- for- profits, financial institutions, commercial, retail entities, office buildings, vacant parcels and single family homes. There are also about 12 housing units located in this development area. The credit union building was built in 1920. The VFW site is comprised of a very large parking lot and a building built in 1884 and most recently used as a bar and grill until it closed in 2019. The large underutilized parking lot is in a deteriorated condition. Business centers built in 1949, 1963, 1965 and 1983 may benefit with the amendment to this district. Access to the commercial sites can be challenging with the high volume of traffic on Richmond Street, and ingress and egress to parking can be a challenge as well. This entire corridor is a high visibility route into Downtown Appleton. Rehabilitation of the existing buildings and conservation of the businesses along with redevelopment of this blighted site would further enhance the entire area.



Greywolf Partners, Inc. has proposed to construct a multi-family project on the former VFW site which includes parcels 31-5-1232-00, 1234-00, 1236-00 and 1238-00. Three of these parcels are the former VFW parking lot, and the other parcel is an older duplex.

The proposed multi-family project would consist of 91 apartments with 94 underground parking stalls and 22 surface parking stalls. This new multi-family development is proposed to contain the following units:

- 30 studios (514-655 sq. ft.)
- 33 one-bedrooms (730-790 sq. ft.)
- 24 two-bedrooms (1,016-1,248 sq. ft.)
- 4 three-bedrooms (1,428 sq. ft.)

Greywolf Partners, Inc. would start construction in November 2021 and be ready for occupancy in March 2023. Greywolf estimates a total development cost of \$18,400,000.

- **300 NORTH Richmond Street (West) Block**



- **400 NORTH Richmond Street (West) Block**



- **500 NORTH Richmond Street (West) Block**



- **600 NORTH Richmond Street (East) Block**



- **600 NORTH Richmond Street (West) Block**



Development Areas #1 and #5 (new) are the only 2 areas that changed. On the following page is the list of parcels in these 2 areas.

TAXKEY	Owner Name	Property Address	Prop Zip	Zoning	Area in Square Feet	Business Name	Personal Property Value	Improvements	Land Value	Total Real Estate Value	Total Real Estate & Personal Property Value	Develop Area	Rehab/Conservation/Re development
31-0-0976-02	MAI VANG	104 S MEMORIAL DR	54911	CBD	1474.13	MAI'S DELI LLC	\$ 32,600.00	\$ -	\$ -	\$ -	\$ 32,600.00	1	Rehab/Conservation
31-3-0976-00	GENIA'S LEGACY LLC	623 W COLLEGE AVE	54911	CBD	5787.03	FOXLEY'S GALLERY LTD	\$ 3,600.00	\$ 224,600.00	\$ 69,400.00	\$ 294,000.00	\$ 297,600.00	1	Rehab/Conservation
31-3-0976-01	MAI VANG	104 S MEMORIAL DR	54911	CBD	6788.01	ALLEGRA APPLETON : ROCKVILLE CORPORATION	\$ -	\$ 90,400.00	\$ 107,500.00	\$ 197,900.00	\$ 197,900.00	1	Rehab/Conservation
31-3-0979-00	APPLETON WEST END REAL	609 W COLLEGE AVE	54911	CBD	17311.70	VAL U BEAUTY SUPPLY LLC	\$ 1,300.00	\$ 271,700.00	\$ 202,300.00	\$ 474,000.00	\$ 475,300.00	1	Rehab/Conservation
31-3-0979-00	APPLETON WEST END REAL	609 W COLLEGE AVE	54911	CBD		SIDE QUEST GAMING LLC	\$ 11,000.00			\$ 11,000.00	\$ 11,000.00	1	Rehab/Conservation
31-3-0983-00	DAS VENTURES HOLDINGS	603 W COLLEGE AVE	54911	CBD	8653.19	APPLETON BEER FACTORY : DAS VENTURES INC	\$ 65,500.00	\$ 488,600.00	\$ 112,500.00	\$ 601,100.00	\$ 666,600.00	1	Rehab/Conservation
31-3-0985-00	JAMES LISON	601 W COLLEGE AVE	54911	CBD	2880.00	PIXEL PRO AUDIO LLC	\$ 6,300.00	\$ 168,900.00	\$ 46,100.00	\$ 215,000.00	\$ 221,300.00	1	Rehab/Conservation
31-3-0986-00	MCFLESHMAN'S COMMONS L	115 S STATE ST	54911	CBD	6724.46	MC FLESHMAN'S BREWING CO LLC	\$ 63,500.00	\$ 539,000.00	\$ 63,900.00	\$ 602,900.00	\$ 666,400.00	1	Rehab/Conservation
31-3-0988-00	121 STATE ST LLC	121 S STATE ST	54911	CBD	10395.64	APPLETON BICYCLE SHOP LLC	\$ 5,600.00	\$ 126,500.00	\$ 83,000.00	\$ 209,500.00	\$ 215,100.00	1	Rehab/Conservation
31-3-0990-00	THE MOORING FOUNDATION	131 S STATE ST	54911	CBD	3293.82		\$ -	\$ -	\$ -	\$ -	\$ -	1	
31-3-0991-00	THE MOORING FOUNDATION	610 W LAWRENCE ST	54911	CBD	2353.25		\$ -	\$ -	\$ -	\$ -	\$ -	1	
31-3-0992-00	RUBY LOU PROPERTIES LL	614 W LAWRENCE ST	54911	CBD	7203.91		\$ -	\$ 24,800.00	\$ 35,700.00	\$ 60,500.00	\$ 60,500.00	1	Rehab/Conservation
31-3-0993-00	RUBY LOU PROPERTIES LL	620 W LAWRENCE ST	54911	CBD	9984.87	FOX VALLEY RESTAURANT SUPPLY INC	\$ 3,000.00	\$ 108,100.00	\$ 59,900.00	\$ 168,000.00	\$ 171,000.00	1	Rehab/Conservation
31-3-0996-00	ROBERT MAZZA	122 S MEMORIAL DR	54911	CBD	22767.31	HOBBY TOWN - APPLETON STORE : RJM ENTERPRISES-OSHKOSH INC	\$ 10,900.00	\$ 138,000.00	\$ 182,000.00	\$ 320,000.00	\$ 330,900.00	1	Rehab/Conservation
31-3-0998-00	RUBY LOU PROPERTIES LL	613 W COLLEGE AVE	54911	CBD	5559.28		\$ -	\$ 35,600.00	\$ 24,400.00	\$ 60,000.00	\$ 60,000.00	1	Rehab/Conservation
31-3-0999-00	JOHN GREINER	535 W COLLEGE AVE	54911	CBD	2879.67	JACK'S APPLE PUB LLC	\$ 3,800.00	\$ 151,100.00	\$ 51,800.00	\$ 202,900.00	\$ 206,700.00	1	Rehab/Conservation
31-3-0999-00	JOHN GREINER	535 W COLLEGE AVE	54911	CBD		MR TACO AUTHENTIC MEXICAN CUISINE CORPORATION	\$ 1,600.00			\$ 1,600.00	\$ 1,600.00	1	Rehab/Conservation
31-3-1003-00	EFS LLC	523 W COLLEGE AVE	54911	CBD	14492.38	C-VINE LOUNGE LLC	\$ 28,100.00	\$ 724,800.00	\$ 246,400.00	\$ 971,200.00	\$ 999,300.00	1	Rehab/Conservation
31-3-1003-00	EFS LLC	523 W COLLEGE AVE	54911	CBD		OB'S BRAU HAUS GASTRO BREW PUB : OLD BAVARIAN BRAUHAUS INC	\$ 77,200.00			\$ 77,200.00	\$ 77,200.00	1	Rehab/Conservation
31-3-1003-00	EFS LLC	523 W COLLEGE AVE	54911	CBD		SUSHI LOVER : C & K CATERING CORPORATION	\$ 176,700.00			\$ 176,700.00	\$ 176,700.00	1	Rehab/Conservation
31-3-1004-00	KOROLL PROPERTIES LLC	519 W COLLEGE AVE	54911	CBD	4311.34	DEJA VU MARTINI/THE MONKEY BAR : DEJA VU ENTERPRSES LLC	\$ 40,200.00	\$ 336,300.00	\$ 77,600.00	\$ 413,900.00	\$ 454,100.00	1	Rehab/Conservation
31-3-1005-00	BELA DEVELOPMENT LLC	513 W COLLEGE AVE	54911	CBD	7123.90	513 APPLETON LLC THE	\$ 2,800.00	\$ 720,800.00	\$ 128,100.00	\$ 848,900.00	\$ 851,700.00	1	Rehab/Conservation
31-3-1006-00	BELA DEVELOPMENT LLC	516 W LAWRENCE ST	54911	CBD	11461.17		\$ -	\$ 10,000.00	\$ 90,900.00	\$ 100,900.00	\$ 100,900.00	1	Rehab/Conservation
31-3-1008-00	NORWEST BANK WISCONSIN	118 S STATE ST	54911	CBD	34129.56	WELLS FARGO BANK NA #100429	\$ 97,000.00	\$ 791,700.00	\$ 341,000.00	\$ 1,132,700.00	\$ 1,229,700.00	1	Rehab/Conservation
31-3-1014-00	CRESENCIO VICTORIA	129 S WALNUT ST	54911	CBD	4774.04		\$ -	\$ 54,900.00	\$ 25,100.00	\$ 80,000.00	\$ 80,000.00	1	
31-3-1015-00	CRESENCIO VICTORIA	510 W LAWRENCE ST	54911	CBD	2650.38		\$ -	\$ 55,700.00	\$ 24,300.00	\$ 80,000.00	\$ 80,000.00	1	
31-3-1016-00	CITY OF APPLETON	125 S WALNUT ST	54911	CBD	7621.40		\$ -	\$ -	\$ -	\$ -	\$ -	1	Rehab/Conservation
31-3-1017-00	CAROL HAUSSERMAN ET AL	119 S WALNUT ST	54911	CBD	7560.18		\$ -	\$ 78,000.00	\$ 82,000.00	\$ 160,000.00	\$ 160,000.00	1	Rehab/Conservation
31-3-1020-00	JJS VENTURES LLC	511 W COLLEGE AVE	54911	CBD	5768.10	FRESS RESTAURANT & BAR : DVV ENTERPRISES LLC	\$ 7,900.00	\$ 508,100.00	\$ 109,400.00	\$ 617,500.00	\$ 625,400.00	1	Rehab/Conservation
31-3-1021-00	VICTORIAS APPLETON INC	507 W COLLEGE AVE	54911	CBD	2884.28		\$ -	\$ 259,300.00	\$ 57,600.00	\$ 316,900.00	\$ 316,900.00	1	Rehab/Conservation
31-3-1022-00	VICTORIAS APPLETON INC	503 W COLLEGE AVE	54911	CBD	5532.75	VICTORIA'S APPLETON INC	\$ 61,400.00	\$ 249,000.00	\$ 121,400.00	\$ 370,400.00	\$ 431,800.00	1	Rehab/Conservation
31-5-1058-00	STATEVIEW LLC	532 W COLLEGE AVE	54911	CBD	3004.67	STATEVIEW LLC	\$ 3,200.00	\$ 231,200.00	\$ 51,800.00	\$ 283,000.00	\$ 286,200.00	1	Rehab/Conservation
31-5-1059-00	ANDREW THORNELL	530 W COLLEGE AVE	54911	CBD	3004.28	MARLEY'S SMOKE SHOP % ANDY THORNELL	\$ 23,900.00	\$ 123,500.00	\$ 49,000.00	\$ 172,500.00	\$ 196,400.00	1	Rehab/Conservation
31-5-1060-00	PATRICK FLANAGAN	524 W COLLEGE AVE	54911	CBD	11542.08	FLANAGAN'S STOP & SHOP INC	\$ 6,200.00	\$ 326,100.00	\$ 201,500.00	\$ 527,600.00	\$ 533,800.00	1	Rehab/Conservation
31-5-1060-00	PATRICK FLANAGAN	524 W COLLEGE AVE	54911	CBD		528 BY PISCO MAR : PISCO MAR LLC	\$ 2,200.00			\$ 2,200.00	\$ 2,200.00	1	Rehab/Conservation
31-5-1063-00	NOBLE ASSETS INC	514 W COLLEGE AVE	54911	CBD	8623.09	CRAZY SWEET : FENDT & SCHALLIOL ENTERPRISES LLC	\$ 29,100.00	\$ 155,200.00	\$ 154,900.00	\$ 310,100.00	\$ 339,200.00	1	Rehab/Conservation
31-5-1065-00	FRASER PROPERTIES LLC	512 W COLLEGE AVE	54911	CBD	2913.84		\$ -	\$ 98,900.00	\$ 52,400.00	\$ 151,300.00	\$ 151,300.00	1	Rehab/Conservation
31-5-1066-00	FRASER PROPERTIES LLC	509 W JOHNSTON ST	54911	CBD	2934.01		\$ -	\$ 234,700.00	\$ 31,700.00	\$ 266,400.00	\$ 266,400.00	1	Rehab/Conservation
31-5-1067-00	FRASER PROPERTIES LLC	508 W COLLEGE AVE	54911	CBD	2940.09		\$ -	\$ 129,400.00	\$ 55,700.00	\$ 185,100.00	\$ 185,100.00	1	Rehab/Conservation
31-5-1068-00	FRASER PROPERTIES LLC	506 W COLLEGE AVE	54911	CBD	2882.44		\$ -	\$ 121,400.00	\$ 54,700.00	\$ 176,100.00	\$ 176,100.00	1	Rehab/Conservation
31-5-1070-00	COLLEGE AVE LEGACY LLC	500 W COLLEGE AVE	54911	CBD	4320.45	MAKAROFF SCHOOL OF BALLET LTD	\$ 900.00	\$ 89,800.00	\$ 89,800.00	\$ 179,600.00	\$ 180,500.00	1	Rehab/Conservation
31-5-1070-00	COLLEGE AVE LEGACY LLC	500 W COLLEGE AVE	54911	CBD		ACOCA COFFEE HAUS : WAAM ENTERPRISES LLC	\$ 8,600.00			\$ 8,600.00	\$ 8,600.00	1	Rehab/Conservation

31-5-1070-01	BANKS NATASHA	111 N WALNUT ST	54911	CBD	1431.34	COZZY CORNER THE : BENNETT MANOR 2 LLC	\$ 82,300.00	\$ 47,100.00	\$ 29,900.00	\$ 77,000.00	\$ 159,300.00	1	Rehab/Conservation
31-5-1138-00	LANDMARK INFRASTRUCTUR	133 N STATE ST	54911	CBD	14715.22		\$ -	\$ -	\$ -	\$ -	\$ -	1	
31-5-1138-01	US SPRINT COMMUNICATIO	123 N STATE ST	54911	CBD	10669.38		\$ -	\$ -	\$ -	\$ -	\$ -	1	
31-5-1138-02	WISCONSIN ELECTRIC POW	139 N STATE ST	54911	CBD	31102.88		\$ -	\$ -	\$ -	\$ -	\$ -	1	
31-5-1139-00	2418 S ONEIDA ST LLC	226 N RICHMOND ST	54911	C2	13690.27		\$ -	\$ 100.00	\$ 47,000.00	\$ 47,100.00	\$ 47,100.00	1	Redevelopment
31-5-1144-00	US VENTURE INC	N RICHMOND ST	54911	CBD	11005.90		\$ -	\$ -	\$ 66,200.00	\$ 66,200.00	\$ 66,200.00	1	
31-5-1147-00	JAMIE BOYCE	208 N RICHMOND ST	54911	CBD	5793.06		\$ -	\$ 60,300.00	\$ 34,700.00	\$ 95,000.00	\$ 95,000.00	1	
31-5-1148-00	JAMIE BOYCE	200 N RICHMOND ST	54911	CBD	8528.76		\$ -	\$ 69,500.00	\$ 50,500.00	\$ 120,000.00	\$ 120,000.00	1	
31-5-1148-01	JAMIE BOYCE	204 N RICHMOND ST	54911	CBD	2463.95	RICHMOND RESALE LLC	\$ 2,600.00	\$ 66,300.00	\$ 14,700.00	\$ 81,000.00	\$ 83,600.00	1	
31-5-1149-00	MICHAEL LAUX	139 N FAIR ST	54911	CBD	6030.20		\$ -	\$ 40,900.00	\$ 18,100.00	\$ 59,000.00	\$ 59,000.00	1	
31-5-1158-00	OLD BRICK PROPERTIES L	110 N RICHMOND ST	54911	CBD	78861.64	GOOD COMPANY LTD	\$ 63,800.00	\$ 489,100.00	\$ 630,900.00	\$ 1,120,000.00	\$ 1,183,800.00	1	Rehab/Conservation
31-5-1159-00	RANDY KESTER	638 W COLLEGE AVE	54911	CBD	3042.67	EXPERT JEWELRY REPAIR LLC	\$ 900.00	\$ 37,800.00	\$ 41,700.00	\$ 79,500.00	\$ 80,400.00	1	Rehab/Conservation
31-5-1160-00	SPARKY MARK LLC	600 W COLLEGE AVE	54911	CBD	4072.50	MUNCHEEZ PIZZERIA : VANDER LINDEN BUS VENTURES LLC	\$ 2,300.00	\$ 77,500.00	\$ 53,500.00	\$ 131,000.00	\$ 133,300.00	1	Rehab/Conservation
31-5-1162-00	SHANE KRUEGER	602 W COLLEGE AVE	54911	CBD	2837.78	APPLETON IMPORTS % SHANE KRUEGER	\$ -	\$ 88,300.00	\$ 32,600.00	\$ 120,900.00	\$ 120,900.00	1	Rehab/Conservation
31-5-1163-00	FDS LLC	604 W COLLEGE AVE	54911	CBD	2464.33	POSH % DEMETRA SCHADT	\$ 1,900.00	\$ 126,500.00	\$ 28,500.00	\$ 155,000.00	\$ 156,900.00	1	Rehab/Conservation
31-5-1164-00	FREDERICK VANHANDEL	606 W COLLEGE AVE	54911	CBD	2090.86		\$ -	\$ 90,800.00	\$ 24,300.00	\$ 115,100.00	\$ 115,100.00	1	Rehab/Conservation
31-5-1165-00	FREDERICK VANHANDEL	610 W COLLEGE AVE	54911	CBD	1717.41	COSTUME SHOPPE % FREDERICK G VAN HANDEL	\$ 1,900.00	\$ 98,600.00	\$ 20,200.00	\$ 118,800.00	\$ 120,700.00	1	Rehab/Conservation
31-5-1166-00	INVESTMENT CREATIONS L	612 W COLLEGE AVE	54911	CBD	1345.45	SUPREME TATTOO SOCIETY % KANI XIONG	\$ 4,600.00	\$ 103,700.00	\$ 16,300.00	\$ 120,000.00	\$ 124,600.00	1	Rehab/Conservation
31-5-1167-00	JGA INVESTMENTS LLC	614 W COLLEGE AVE	54911	CBD	1254.41		\$ -	\$ 86,900.00	\$ 15,100.00	\$ 102,000.00	\$ 102,000.00	1	Rehab/Conservation
31-5-1168-00	JOHN YDE	616 W COLLEGE AVE	54911	CBD	883.09	APPLETON COBBLER SHOPPE % JOHN A YDE	\$ 1,900.00	\$ 61,700.00	\$ 11,000.00	\$ 72,700.00	\$ 74,600.00	1	Rehab/Conservation
31-5-1169-00	ANTAR BARQUET-LEYTE ET AL	618 W COLLEGE AVE	54911	CBD	649.24		\$ -	\$ 30,900.00	\$ 9,700.00	\$ 40,600.00	\$ 40,600.00	1	Rehab/Conservation
31-5-2226-00	WISCONSIN CENTRAL LTD	LAND LOCKED	54911		23651.79		\$ -	\$ -	\$ -	\$ -	\$ -	1	
31-0-1304-00	RICKEY J LLC	603 N RICHMOND ST	54914	C2	1042.93		\$ -	\$ -	\$ -	\$ -	\$ -	5	
31-5-0693-00	LEWIS KRUEGER	305 N RICHMOND ST	54914	C2	9558.30	MYLEE'S EGG ROLL HOUSE : MYLEE'S EGG ROLLS LLC	\$ 1,100.00	\$ 95,200.00	\$ 71,800.00	\$ 167,000.00	\$ 168,100.00	5	
31-5-0694-00	ZEST RENTALS LLC	710 W FRANKLIN ST	54914	R1C	4928.23		\$ -	\$ 60,400.00	\$ 14,000.00	\$ 74,400.00	\$ 74,400.00	5	
31-5-0696-00	LEWIS KRUEGER	N RICHMOND ST	54914	C2	8740.88		\$ -	\$ -	\$ 51,200.00	\$ 51,200.00	\$ 51,200.00	5	
31-5-0697-00	DOTY INVESTMENTS II	N RICHMOND ST	54914	R3	5236.41		\$ -	\$ -	\$ 22,900.00	\$ 22,900.00	\$ 22,900.00	5	
31-5-0698-00	DOTY INVESTMENTS II	323 N RICHMOND ST	54914	R3	4351.66		\$ -	\$ 106,400.00	\$ 12,400.00	\$ 118,800.00	\$ 118,800.00	5	
31-5-0699-00	AMY ZAK	711 W HARRIS ST	54914	R1C	5857.75		\$ -	\$ 115,000.00	\$ 16,300.00	\$ 131,300.00	\$ 131,300.00	5	
31-5-1028-00	I.A.A.M. LLC	604 N RICHMOND ST	54911	C2	16299.62	HUSSEY, BRENNAN PT LLC	\$ -	\$ 191,900.00	\$ 81,300.00	\$ 273,200.00	\$ 273,200.00	5	Rehab/Conservation
31-5-1028-00	I.A.A.M. LLC	604 N RICHMOND ST	54911	C2		STUDIO 604 LLC	\$ 11,900.00				\$ 11,900.00	5	Rehab/Conservation
31-5-1028-00	I.A.A.M. LLC	604 N RICHMOND ST	54911	C2		POPP DENTAL LABORATORY INC	\$ 6,900.00				\$ 6,900.00	5	Rehab/Conservation
31-5-1029-00	I.A.A.M. LLC	550 N RICHMOND ST	54911	C2	22552.26		\$ -	\$ 3,500.00	\$ 64,600.00	\$ 68,100.00	\$ 68,100.00	5	Rehab/Conservation
31-5-1031-00	MDC REAL ESTATE INVEST	536 N RICHMOND ST	54911	C2	35243.09	APPLE TOWN DENTAL CARE : MDC APPLETON LLC	\$ 68,400.00	\$ 513,400.00	\$ 185,000.00	\$ 698,400.00	\$ 766,800.00	5	Rehab/Conservation
31-5-1031-00	MDC REAL ESTATE INVEST	536 N RICHMOND ST	54911	C2		FOX VALLEY COMMUNICATIONS LLC	\$ 5,300.00				\$ 5,300.00	5	Rehab/Conservation
31-5-1032-00	DENNIS VIEGUT	532 N RICHMOND ST	54911	C2	17620.92	SOTO'S MARTIAL ARTS LLC	\$ 2,600.00	\$ 102,000.00	\$ 87,900.00	\$ 189,900.00	\$ 192,500.00	5	Rehab/Conservation
31-5-1034-00	CHERIE VIEGUT	524 N RICHMOND ST	54911	C2	17620.55	HAIR DESIGNERS : JBSOTO LLC	\$ 3,600.00	\$ 164,100.00	\$ 87,900.00	\$ 252,000.00	\$ 255,600.00	5	Rehab/Conservation
31-5-1038-00	AUTOZONE INC	500 N RICHMOND ST	54911	C2	56279.83	AUTO ZONE PARTS INC #101962	\$ 19,100.00	\$ 732,300.00	\$ 337,700.00	\$ 1,070,000.00	\$ 1,089,100.00	5	Rehab/Conservation



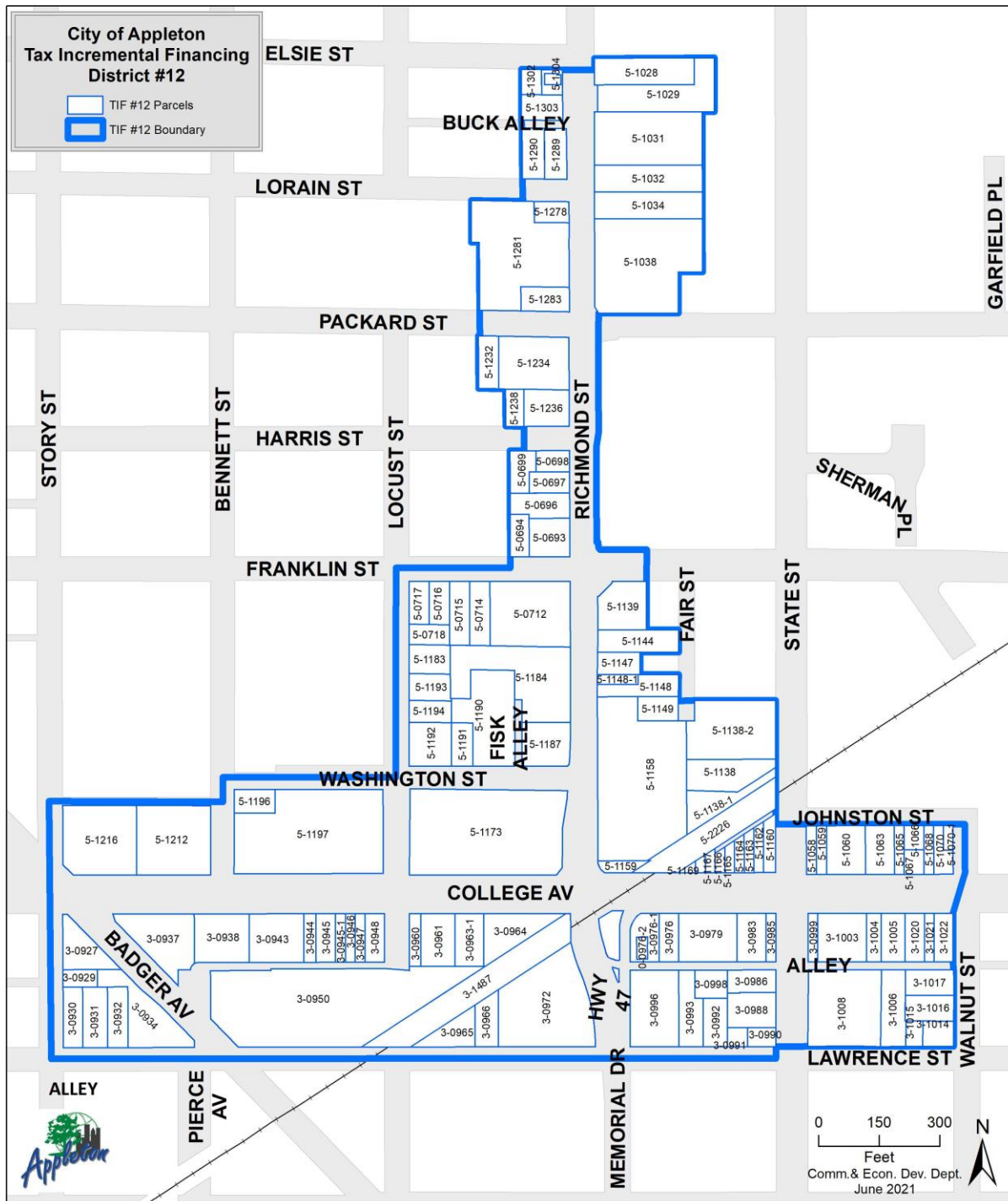
31-5-1232-00	CORE LLC	719 W PACKARD ST	54914	R2	6498.66		\$ -	\$ 109,400.00	\$ 19,200.00	\$ 128,600.00	\$ 128,600.00	5	Redevelopment
31-5-1234-00	CORE LLC	N RICHMOND ST	54914	C2	22611.30		\$ -	\$ 10,900.00	\$ 158,300.00	\$ 169,200.00	\$ 169,200.00	5	Redevelopment
31-5-1236-00	CORE LLC	N RICHMOND ST	54914	C2	10155.77		\$ -	\$ 8,800.00	\$ 70,400.00	\$ 79,200.00	\$ 79,200.00	5	Redevelopment
31-5-1238-00	CORE LLC	W HARRIS ST	54914	R1C	4185.67		\$ -	\$ 1,800.00	\$ 18,400.00	\$ 20,200.00	\$ 20,200.00	5	Redevelopment
31-5-1278-00	JOSEPH ARNOLDUSSEN	525 N RICHMOND ST	54914	C2	4471.99	A-S-K ASSOCIATES INC	\$ 5,700.00	\$ 95,400.00	\$ 26,800.00	\$ 122,200.00	\$ 127,900.00	5	
31-5-1281-00	COMMUNITY FIRST CREDIT	509 N RICHMOND ST	54914	C2	50601.58	COMMUNITY FIRST CREDIT UNION	\$ 84,200.00	\$ 508,100.00	\$ 272,100.00	\$ 780,200.00	\$ 864,400.00	5	Rehab/Conservation
31-5-1281-00	COMMUNITY FIRST CREDIT	509 N RICHMOND ST	54914	C2		COMMUNITY FIRST SERVICES INC	\$ 2,600.00				\$ 2,600.00	5	Rehab/Conservation
31-5-1283-00	CORE LLC	501 N RICHMOND ST	54914	C2	7199.99		\$ -	\$ 66,800.00	\$ 43,200.00	\$ 110,000.00	\$ 110,000.00	5	Rehab/Conservation
31-5-1289-00	RICHMOND LLC	533 N RICHMOND ST	54914	C2	6873.79	NEUMAN'S AUTO REPAIR LLC	\$ 3,300.00	\$ 74,600.00	\$ 41,300.00	\$ 115,900.00	\$ 119,200.00	5	
31-5-1290-00	RICHMOND LLC	W LORAIN ST	54914	R1C	6873.81		\$ -	\$ -	\$ 17,200.00	\$ 17,200.00	\$ 17,200.00	5	
31-5-1302-00	RICKEY J LLC	709 W ELSIE ST	54914	C2	3141.48		\$ -	\$ 67,900.00	\$ 9,300.00	\$ 77,200.00	\$ 77,200.00	5	
31-5-1303-00	RICKEY J LLC	545 N RICHMOND ST	54914	C2	6408.61	VALLEY GLASS COMPANY INC	\$ 900.00	\$ 216,500.00	\$ 35,200.00	\$ 251,700.00	\$ 252,600.00	5	
31-5-1304-00	RICKEY J LLC	601 N RICHMOND ST	54914	C2	2224.20		\$ -	\$ 116,300.00	\$ 18,700.00	\$ 135,000.00	\$ 135,000.00	5	

19.04 acres

\$ 1,151,900.00 \$ 12,602,800.00 \$ 5,991,800.00 \$ 18,594,600.00 \$ 19,746,500.00



## Section 3: District Boundary Map and Legal Description



**TIF District #12 Legal Description**

DESCRIPTION: A TRACT OF LAND BEING PART OF THE SW ¼ AND THE NW ¼ OF SECTION 26 AND A PART OF THE NE ¼ AND THE SE ¼ OF SECTION 27, ALL IN TOWNSHIP 21 NORTH, RANGE 17 EAST, CITY OF APPLETON, OUTAGAMIE COUNTY, WISCONSIN BOUNDED AND DESCRIBED AS FOLLOWS:

COMMENCING AT THE CENTERLINE OF LOCUST STREET AND FRANKLIN STREET AND BEING THE POINT OF BEGINNING;

THENCE EAST 281 FEET ALONG THE CENTERLINE OF FRANKLIN STREET TO THE SOUTHERLY EXTENSION OF THE WEST LINE OF LOT 1, BLOCK 4, HERMAN ERB'S 5<sup>TH</sup> WARD ADDITION, ACCORDING TO THE RECORDED ASSESSOR'S MAP OF THE CITY OF APPLETON;

THENCE NORTH 292.14 FEET ALONG SAID EXTENSION AND THEN THE WEST LINE OF LOT'S 1 THRU 5 OF SAID BLOCK 4 TO THE SOUTH LINE OF HARRIS STREET;

THENCE EAST 36.8 FEET ALONG THE SOUTH LINE OF HARRIS STREET TO THE SOUTHERLY EXTENSION OF THE EAST LINE OF LOT 6, BLOCK 37, HERMAN ERB'S 5<sup>TH</sup> WARD ADDITION, ACCORDING TO THE RECORDED ASSESSOR'S MAP OF THE CITY OF APPLETON;

THENCE NORTH ALONG SAID EXTENDED LINE TO THE NORTH LINE OF HARRIS STREET;

THENCE WEST 45.5 FEET ALONG THE NORTH LINE OF HARRIS STREET;

THENCE NORTH 92.39 FEET TO THE NORTH LINE OF SAID LOT 6;

THENCE WEST 66.5 FEET ALONG THE NORTH LINE OF SAID LOT 6 TO THE WEST LINE OF BLOCK 37, HERMAN ERB'S 5<sup>TH</sup> WARD ADDITION, ACCORDING TO THE RECORDED ASSESSOR'S MAP OF THE CITY OF APPLETON;

THENCE NORTH 130 FEET ALONG THE WEST LINE OF BLOCK 37, HERMAN ERB'S 5<sup>TH</sup> WARD ADDITION, ACCORDING TO THE RECORDED ASSESSOR'S MAP OF THE CITY OF APPLETON TO THE SOUTH LINE OF PACKARD STREET;

THENCE EAST 2.00 FEET ALONG THE SOUTH LINE OF PACKARD STREET;

THENCE NORTH 228 FEET M/L ALONG THE SOUTHERLY EXTENSION OF THE WEST LINE OF LOT 10, BLOCK 49, HERMAN ERB'S 5<sup>TH</sup> WARD ADDITION, ACCORDING TO THE RECORDED

ASSESSOR'S MAP OF THE CITY OF APPLETON AND THEN ALONG SAID WEST LINE TO THE NW CORNER THEREOF;

THENCE WEST 20 FEET ALONG THE SOUTH LINE OF LOT 4, BLOCK 49, HERMAN ERB'S 5<sup>TH</sup> WARD ADDITION, ACCORDING TO THE RECORDED ASSESSOR'S MAP OF THE CITY OF APPLETON TO THE SOUTHWEST CORNER THEREOF;

THENCE NORTH 102 FEET ALONG THE WEST LINE OF LOT 4 OF SAID BLOCK 49 TO THE SOUTH LINE OF LORAIN STREET;

THENCE EAST 132 FEET ALONG THE SOUTH LINE OF LORAIN STREET TO THE SOUTHERLY EXTENSION OF THE WEST LINE OF LOT 2, BLOCK 50, HERMAN ERB'S 5<sup>TH</sup> WARD ADDITION, ACCORDING TO THE RECORDED ASSESSOR'S MAP OF THE CITY OF APPLETON;

THENCE NORTH 330 FEET ALONG SAID EXTENDED LINE AND THEN THE WEST LINE SAID LOT 2 AND THE WEST LINE OF LOT 13, BLOCK 50, HERMAN ERB'S 5<sup>TH</sup> WARD ADDITION, ACCORDING TO THE RECORDED ASSESSOR'S MAP OF THE CITY OF APPLETON TO THE SOUTH LINE OF ELSIE STREET;

THENCE EAST 176 FEET ALONG THE SOUTH LINE OF ELSE STREET AND THE EASTERLY EXTENSION OF SAID LINE TO THE EAST LINE OF RICHMOND STREET;

THENCE NORTH 29.97 FEET M/L ALONG SAID EAST LINE TO THE NORTHWEST CORNER OF LOT 12, BLOCK 17, HERMAN ERB'S 5<sup>TH</sup> WARD ADDITION, ACCORDING TO THE RECORDED ASSESSOR'S MAP OF THE CITY OF APPLETON;

THENCE EAST 297 FEET ALONG THE NORTH LINE OF LOT 12, BLOCK 17, HERMAN ERB'S 5<sup>TH</sup> WARD ADDITION, ACCORDING TO THE RECORDED ASSESSOR'S MAP OF THE CITY OF APPLETON TO THE NORTHEAST CORNER THEREOF;

THENCE SOUTH 132 FEET ALONG THE EAST LINE OF LOT 12 AND 13, BLOCK 17, HERMAN ERB'S 5<sup>TH</sup> WARD ADDITION, ACCORDING TO THE RECORDED ASSESSOR'S MAP OF THE CITY OF APPLETON;

THENCE WEST 30 FEET ALONG THE SOUTH LINE OF SAID LOT 13 TO THE NORTHEAST CORNER OF LOT 14, BLOCK 17, HERMAN ERB'S 5<sup>TH</sup> WARD ADDITION, ACCORDING TO THE RECORDED ASSESSOR'S MAP OF THE CITY OF APPLETON;

THENCE SOUTH 396 FEET ALONG THE EAST LINE OF LOT'S 13 THRU 18, BLOCK 17, HERMAN ERB'S 5<sup>TH</sup> WARD ADDITION, ACCORDING TO THE RECORDED ASSESSOR'S MAP OF THE CITY OF APPLETON;

THENCE WEST 60 FEET ALONG THE NORTH LINE OF LOT 23, BLOCK 17, HERMAN ERB'S 5<sup>TH</sup> WARD ADDITION, ACCORDING TO THE RECORDED ASSESSOR'S MAP OF THE CITY OF APPLETON TO THE NORTHWEST CORNER THEREOF;

THENCE SOUTH 102 FEET ALONG THE WEST LINE OF SAID LOT 23 TO THE NORTH LINE OF PACKARD STREET;

THENCE WEST 201 FEET M/L TO THE NORTHERLY EXTENSION OF THE EAST LINE OF RICHMOND STREET;

THENCE SOUTH 294.7 FEET ALONG SAID NORTHERLY EXTENSION AND THEN THE EAST LINE THEREOF TO AN ANGLE POINT IN THE EAST LINE THEREOF;

THENCE SOUTH 9°02'12" WEST 37.50 FEET ALONG SAID EAST LINE;

THENCE SOUTH 232.99 FEET ALONG SAID EAST LINE TO AN ANGLE POINT IN SAID EAST LINE;

THENCE EAST 3 FEET ALONG SAID RIGHT OF WAY;

THENCE SOUTH 8°18' EAST 14.14 FEET ALONG SAID RIGHT OF WAY;

THENCE SOUTH 38°42'27" EAST 6.42 FEET ALONG SAID RIGHT OF WAY TO THE NORTH LINE OF FRANKLIN STREET;

THENCE EAST 111 FEET M/L ALONG THE NORTH LINE OF FRANKLIN STREET TO THE NORTHERLY EXTENSION OF THE EAST LINE OF LOT 1, BLOCK 28, HERMAN ERB'S 5<sup>TH</sup> WARD ADDITION, ACCORDING TO THE RECORDED ASSESSOR'S MAP OF THE CITY OF APPLETON;

THENCE SOUTH 198 FEET ALONG SAID NORTHERLY EXTENSION AND THEN THE EAST LINE THEREOF;

THENCE EAST 80 FEET TO THE WEST LINE OF FAIR STREET;

THENCE SOUTH 55 FEET ALONG THE WEST LINE OF FAIR STREET;

THENCE WEST 95 FEET ALONG THE NORTH LINE OF LOT 5 OF SAID BLOCK 28;

THENCE SOUTH 55 FEET TO THE SOUTH LINE OF LOT 5 OF SAID BLOCK 28;

THENCE EAST 95 FEET ALONG SAID SOUTH LINE TO THE WEST LINE OF FAIR STREET;

THENCE SOUTH 64.52 FEET TO THE WESTERLY EXTENSION OF THE SOUTH LINE OF LOT 7, BLOCK 27, HERMAN ERB'S 5<sup>TH</sup> WARD ADDITION, ACCORDING TO THE RECORDED ASSESSOR'S MAP OF THE CITY OF APPLETON;

THENCE EAST 240 FEET ALONG SAID WESTERLY EXTENSION AND THEN THE SOUTH LINE THEREOF TO THE WEST LINE OF STATE STREET;

THENCE SOUTH 308.36 FEET M/L ALONG THE WEST LINE OF STATE STREET TO THE WESTERLY EXTENSION OF THE SOUTH LINE OF JOHNSTON STREET;

THENCE EAST ALONG SAID WESTERLY EXTENSION OF JOHNSTON STREET AND THEN THE SOUTH LINE OF JOHNSTON STREET TO THE CENTERLINE OF WALNUT STREET;

THENCE SOUTH ALONG THE CENTERLINE OF WALNUT STREET TO THE NORTH LINE OF COLLEGE AVENUE;

THENCE SOUTHWESTERLY TO THE SOUTHWEST CORNER OF WALNUT STREET AND COLLEGE AVENUE;

THENCE SOUTH ALONG THE WEST LINE OF WALNUT STREET TO THE NORTH LINE OF LAWRENCE STREET;

THENCE WEST ALONG THE NORTH LINE OF LAWRENCE STREET TO THE WEST LINE OF STATE STREET;

THENCE SOUTH ALONG THE WEST LINE OF STATE STREET TO THE CENTERLINE OF LAWRENCE STREET;

THENCE WEST ALONG THE CENTERLINE OF LAWRENCE STREET TO THE CENTERLINE OF STORY STREET;

THENCE NORTH ALONG THE CENTERLINE OF STORY STREET TO THE CENTERLINE OF WASHINGTON STREET;

THENCE EAST ALONG THE CENTERLINE OF WASHINGTON STREET, LYING BETWEEN BLOCK 34 AND BLOCK 35 OF THE **FIFTH WARD PLAT**, TO THE CENTERLINE OF BENNETT STREET;

THENCE NORTH ALONG THE CENTERLINE OF BENNETT STREET TO A POINT 30 FEET NORTH OF THE WESTERLY EXTENSION OF THE SOUTH LINE OF WASHINGTON STREET AND SAID SOUTH

LINE BEING CONTIGUOUS WITH THE NORTH LINE OF LOTS 4, 5, 15, 14 AND 13 OF BLOCK 32 OF THE FIFTH WARD PLAT;  
 THENCE EAST AND PARALLEL TO THE SOUTH LINE OF SAID WASHINGTON STREET TO THE CENTERLINE OF LOCUST STREET  
 THENCE NORTH ALONG THE CENTERLINE OF LOCUST STREET TO THE CENTERLINE OF FRANKLIN STREET AND THE POINT OF BEGINNING.

***Section 4: Identification of Parcels to be Added***

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The purpose of this Plan Amendment is to add the parcels identified in the tables below to the District effective January 1, 2021. The figures listed under the “Current Value” column reflect valuations as of January 1, 2020. The actual addition to the District’s base value will be based on January 1, 2021 valuations which are not yet available. The District’s revised base will first be reflected in the valuations certified for January 1, 2022. Any changes in the valuation of the parcels being added to the District that occurs after January 1, 2021 will impact the incremental value of the District.

**Parcels Currently Located within TID No. 3**

<b>Parcel Number</b>	<b>Street Address</b>	<b>Base Value (Jan. 1, 1993)</b>	<b>Current Value (Jan. 1, 2021)</b>
5-1138	133 N STATE ST	\$ 97,400	\$ 0
5-1138-1	123 N STATE ST	\$ 0	\$ 0
5-1138-2	139 N STATE ST	SPLIT FROM 5-1138	\$ 0
5-1139	226 N RICHMOND ST	\$119,110	\$ 47,100
5-1144	N RICHMOND ST	\$ 37,710	\$ 66,200
5-1147	208 N RICHMOND ST	\$ 52,800	\$ 95,000
5-1148	200 N RICHMOND ST	\$106,300	\$120,000
5-1148-1	204 N RICHMOND ST	\$ 34,500	\$ 83,600
5-1149	139 N FAIR ST	\$ 32,500	\$ 59,000
5-1158	110 N RICHMOND ST	\$382,670	\$210,000
5-1234	N RICHMOND ST	\$ 93,800	\$169,200
5-1236	N RICHMOND ST	\$ 42,800	\$ 79,200
5-1283	501 N RICHMOND ST	\$ 59,380	\$110,000
<b>TOTAL</b>		<b>\$1,058,970</b>	<b>\$1,039,300</b>

**Additional Parcels to be Added to the District**

<b>Parcel Number</b>	<b>Street Address</b>	<b>Current Value (Jan. 1, 2021)</b>
5-0693	305 N RICHMOND ST	\$ 168,100
5-0694	710 W FRANKLIN ST	\$ 74,400
5-0696	N RICHMOND ST	\$ 51,200
5-0697	N RICHMOND ST	\$ 22,900
5-0698	323 N RICHMOND ST	\$ 118,800
5-0699	711 W HARRIS ST	\$ 131,300
5-1028	604 N RICHMOND ST	\$ 292,000
5-1029	550 N RICHMOND ST	\$ 68,100
5-1031	536 N RICHMOND ST	\$ 772,100
5-1032	532 N RICHMOND ST	\$ 192,500
5-1034	524 N RICHMOND ST	\$ 255,600
5-1038	500 N RICHMOND ST	\$1,089,100
5-1158	110 N RICHMOND ST	\$ 973,800
5-1232	719 W PACKARD ST	\$ 128,600
5-1238	W HARRIS ST	\$ 20,200
5-1278	525 N RICHMOND ST	\$ 127,900
5-1281	509 N RICHMOND ST	\$ 867,000
5-1289	533 N RICHMOND ST	\$ 119,200
5-1290	W LORAIN ST	\$ 17,200
5-1302	709 W ELSIE ST	\$ 77,200
5-1303	545 N RICHMOND ST	\$ 252,600
5-1304	601 N RICHMOND ST	\$ 135,000
5-2226	RAILROAD R/W	\$0
<b>TOTAL</b>		<b>\$5,954,800</b>

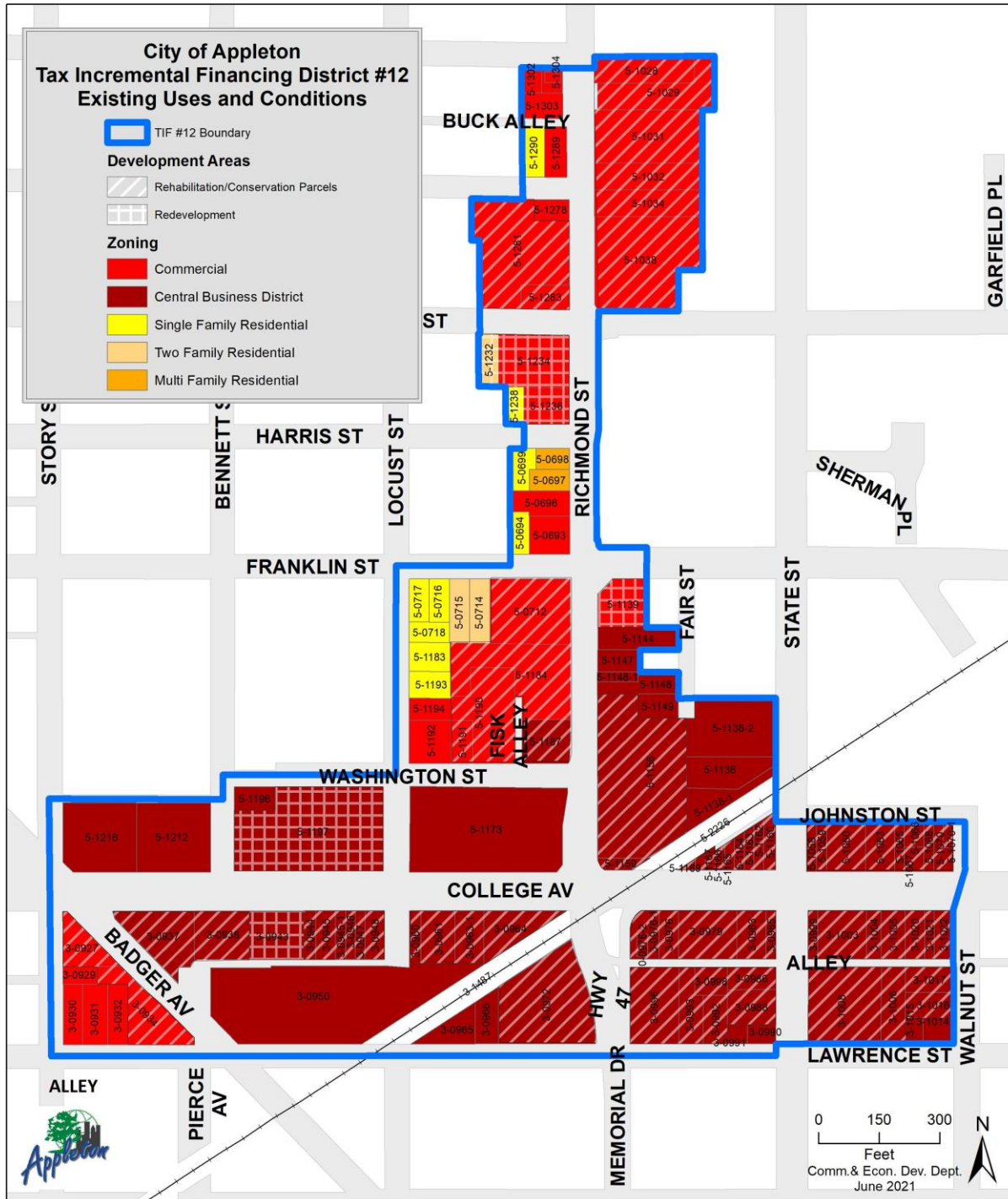
**Total of All Parcels to be Added \$6,994,100**

Map Found on Following Page.





## Section 5: Map Showing Existing Uses and Conditions



## ***Section 6: Equalized Value Test***

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The following calculations demonstrate that the City expects to be in compliance with Wis. Stat. § 66.1105(4)(gm)4.c., which requires that the equalized value of the taxable property proposed to be added to the District, plus the value increment of all existing tax incremental districts, does not exceed 12% of the total equalized value of taxable property within the City.

### **Calculation of City Equalized Value Limit**

City TID IN Equalized Value (Jan. 1, 2020)	\$ 6,200,311,200
<b>TID Valuation Limit @ 12% of Above Value</b>	<b>\$ 744,037,344</b>

### **Calculation of Value Subject to Limit**

Base Value of Territory to be Added to District	\$ 6,994,100
Less: Incremental Value of Overlapped Parcels	\$ -0-
Plus: Incremental Value of Existing Districts (Jan. 1, 2020)	\$ <u>323,544,300</u>

**Total Value Subject to 12% Valuation Limit** **\$330,538,400**

The equalized value of the territory to be added to the District plus the incremental value within all other existing tax incremental districts totals \$330,538,400 which is 5.33% of the City's total equalized value. This value is less than the maximum of \$744,037,344 in equalized value that is permitted for the City.

## ***Section 7: Statement of Kind, Number and Location of Proposed Public Works and Other Projects***

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Project Costs are any expenditure made, estimated to be made, or monetary obligations incurred or estimated to be incurred as outlined in this Plan. Project Costs will be diminished by any income, special assessments or other revenues, including user fees or charges, other than tax increments, received or reasonably expected to be received in connection with the implementation of the Plan. If Project Costs incurred benefit territory outside the District, a proportionate share of the cost is not a Project Cost. Costs identified in this amended Plan are preliminary estimates made prior to design considerations and are

subject to change after planning, design and construction is completed. With all Project Costs, the costs of engineering, design, survey, inspection, materials, construction, restoring property to its original condition, apparatus necessary for public works, legal and other consultant fees, testing, environmental studies, permits, updating City ordinances and plans, judgments or claims for damages and other expenses are included as Project Costs.

As set forth in the District's original Plan approved on August 2, 2017, the following is a list of public works and other tax incremental financing eligible Project Costs that the City expects to make, or may need to make, in conjunction with the implementation of the District's Plan. The map found in Section 8 of this Plan along with the Detailed List of Project Costs found in Section 9 provide additional information as to the kind, number and location of potential Project Costs.

### **A. Municipal Infrastructure Improvements**

- Construction and/or reconstruction of the streets, bridges, pedestrian connections and parking to facilitate development and rehabilitation projects within the District. Scope of work may include right-of-way acquisition, land assembly, grading, gravel, curb and gutter, asphalt, streetlights, traffic signals, walkways, concrete paving, lighting, signage, and related appurtenances.
- Construction and/or reconstruction of a sanitary sewer collection system to facilitate development and rehabilitation projects within the District. The scope of work may include sewer mains, manholes, laterals, force main, lift stations, and related appurtenances.
- Construction and/or reconstruction of the water distribution system to facilitate development and rehabilitation projects within the District. Projects may include water mains, valves, hydrants, service connections, laterals and other related appurtenances.
- Construction and/or reconstruction of storm water drainage facilities to support development and rehabilitation projects within the District. Projects may include retention or detention basins, biofilters, conveyance systems, storm sewer mains, manholes, inlets, drains and related appurtenances.
- Installation of electric and/or natural gas service or the relocation of existing services to facilitate blight elimination and redevelopment or rehabilitation in the District and provide better service. Acquisition of equipment to service the District.
- Installation of telephone, fiber, and cable or the relocation of existing services to facilitate blight elimination and redevelopment or rehabilitation in the District and provide better service. Acquisition of equipment to service the District.
- The costs associated with the design, implementation, purchase and maintenance of streetscape amenities to improve the aesthetic appearance of this District, including but not limited to, decorative lighting, banners and/or flags, public art, landscaping and/or planters, benches and other pedestrian elements to encourage the viability of the businesses in the district and attract high quality development.

- B. Administrative Costs:** These include, but not limited to, a portion of the salaries of the City employees, professional fees, and others directly involved in the projects for the District over the implementation of the project plan. Audit expenses, state filing fees, and any expenses associated with dissolving the District are also eligible costs.
- C. Organizational Costs:** These include, but are not limited to, publication and printing costs in connection with this Project Plan as well as the fees for the financial consultants, attorney, engineers, planners, surveyors, and other contracted services.
- D. Professional Services:** These include, but are not limited to, those costs incurred for architectural, planning, engineering and legal advice and services.
- E. Financing Costs:** Interest, finance fees, bond discounts, redemption premiums, legal opinions, credit ratings, capitalized interest, insurance and other expenses related to financing. This would also include interest on advances made by the City of Appleton.
- F. Land Assembly, Clearance, and Real Estate Acquisitions:** In order to eliminate blight and promote rehabilitation and redevelopment, it may be necessary to assist developers or for the City to acquire and demolish blighted or underutilized properties within the District. These may include but are not limited to, the cost of acquisitions, clearance/demolition, titles, easements, appraisals, consultant fees, closing costs, surveying and mapping, and the lease and/or the sale of property at or below market price to encourage or make feasible an economic development project that is consistent with the intent of this District.
- G. Relocation Costs:** In the event any property is acquired for the projects, expenses including the cost of the relocation plan, director and staff time, publications, appraisals, land and property acquisition costs and relocation benefits as required by Wisconsin Statutes Section 32 are considered eligible project costs.
- H. Development Incentives (Cash Grants and/or Loans):** As a partner in the future redevelopment and rehabilitation/conservation of this District, the City of Appleton may enter into agreements with property owners, lessees, or developers for the purpose of sharing costs to encourage the desired kind of improvements based on the purpose of this District and assure tax base is generated sufficient to recover project costs. This assistance is regularly needed in rehabilitation and redevelopment projects to offset the additional costs in re-use versus greenfield development. Not every project will demand the same level of funding. These payments would be negotiated on a project basis in order to attract new taxable property or rehabilitate existing property in the District. No cash grants or loans will be provided until the Common Council adopts a development agreement and a copy of such agreement will be retained in the City's official records for the TID.
- I. Environmental Audits and Remediation:** Costs related to all environmental assessments and remediation will be considered eligible project costs.



- J. Promotion and Development:** Promotion and development of the District including professional services or marketing, recruitment, realtor commissions and fees in lieu of commissions, marketing services and materials, advertising costs, administrative costs and support of development organizations.
- K. Project Outside the Tax Increment District:** Pursuant to Wisconsin Statutes Section 66.1105(2)(f)1.n, the city may undertake projects within territory located within one-half (1/2) mile of the boundary of the district provided that (1) the project is located within the City's corporate boundaries, and (2) the projects are approved by the Joint Review Board. The cost of projects completed outside the District pursuant to this section are eligible Project Costs and may include any project cost that would otherwise be eligible if undertaken within the District.
- L. Payments Made at the Discretion of the Common Council:** These payments may include but are not limited to payments which are found to be necessary or convenient to the creation of the District or the implementation of the Project Plan that support the goals of the District as outlined in Section 2.

## ***Section 8: Map Showing Proposed Improvements and Uses***

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Maps Found on Following Page.

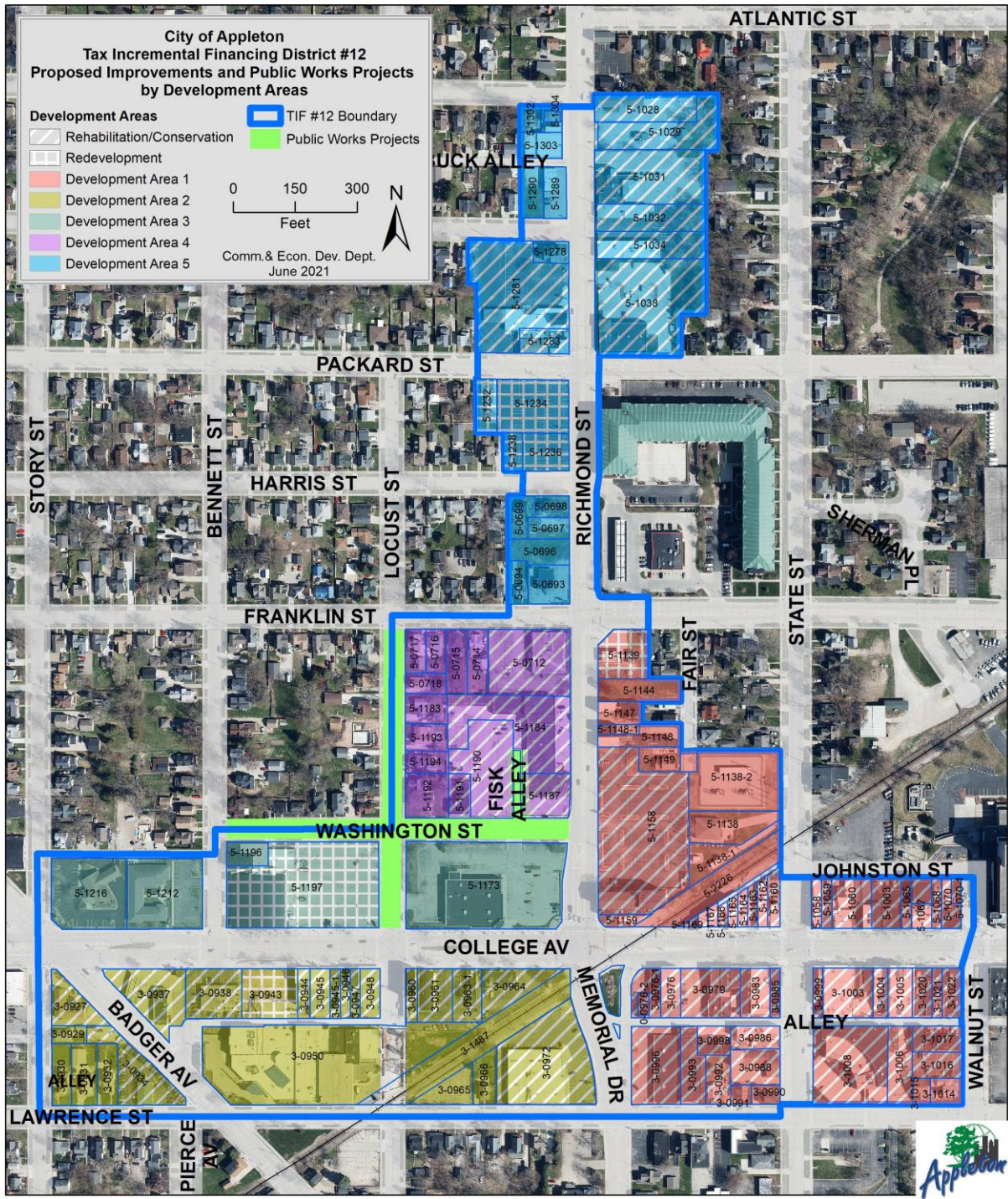
The first map depicts the locations where the City may undertake Municipal Infrastructure Improvements as detailed in Section 7. This includes eligible Project Costs to be incurred outside of, but within ½ mile of the District's boundaries. The second map identifies the ½ mile zone of eligibility.

The following types of Project Costs included in Section 7 are generally expected to be incurred within the Development Areas identified on the map.

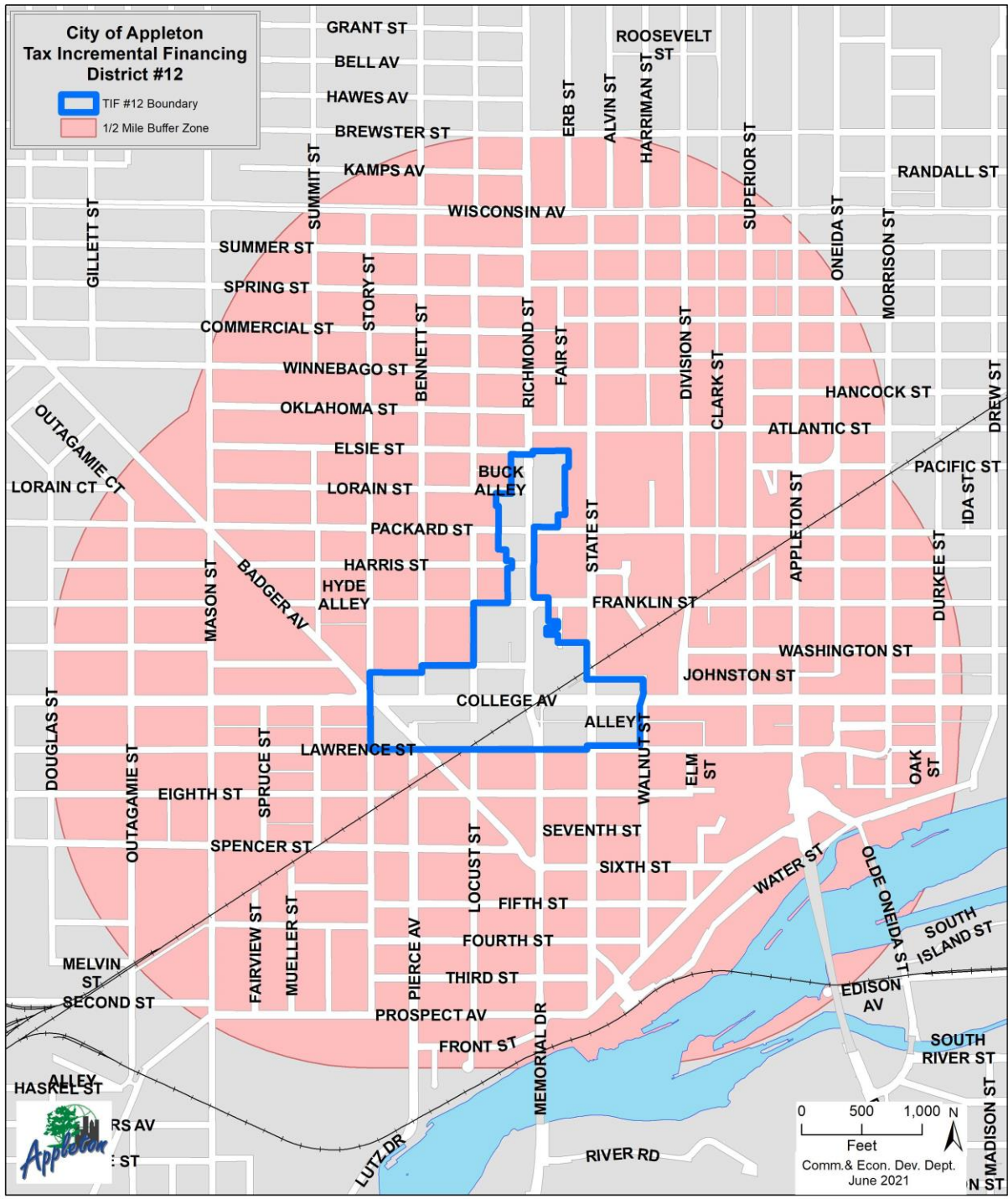
- Municipal Infrastructure Improvements
- Land Assembly, Clearance, and Real Estate Acquisitions
- Relocation Costs
- Development Incentives (Cash Grants and/or Loans)

Other costs identified in Section 7 may be associated with expenditures made for the Municipal Infrastructure Improvements, activities within the Development Areas, or may not relate to a specifically identified geographical location such as District administrative costs.









## Section 9: Detailed List of Project Costs

The following list identifies the Project Costs that the City currently expects to incur in implementing the District’s amended Plan. All projects identified and related costs reflect the best estimates available as of the date of preparation of this amended Plan. All costs are preliminary estimates and may increase or decrease. Certain Project Costs listed may become unnecessary, and other Project Costs not currently identified may need to be made. (Section 7 details the general categories of eligible Project Costs). Changes in Project Cost totals or the types of Project Costs to be incurred will not require that this Plan be further amended. This Plan is not meant to be a budget nor an appropriation of funds for specific Project Costs, but a framework within which to manage Project Costs.

Project/Activity	Total Cost (Original Plan Est.)	Cost Added (This Amendment)	Total Revised Cost Estimate	Estimated Timing
• Municipal Infrastructure Improvements**	\$1,107,300	\$90,300	\$1,197,600	2023 - 2025
• Municipal Infrastructure within the ½ Mile Boundary	None	None	None	N/A
• Development Incentives & Property Grants	\$1,679,176	\$4,255,470	\$5,934,646	2017 - 2039
• Other Costs - Administrative, Professional, Environmental, and Promotion Services Costs. Filing fees and fees charged by State.	\$124,750	(\$68,314)	\$56,436	2017 - 2045
• Financing Costs* <ul style="list-style-type: none"> <li>○ General Fund Advance</li> <li>○ Interest Expense</li> <li>○ General Obligation</li> </ul>	\$1,084,472	(\$779,439)	\$305,033	2017 - 2036
<b>SUBTOTAL:</b>	<b>\$3,995,698</b>	<b>\$3,498,017</b>	<b>\$7,493,715</b>	<b>2017 - 2045</b>
• Financing Costs* <ul style="list-style-type: none"> <li>○ Development Incentives</li> </ul>	\$1,152,423	(\$1,152,423)		
<b>TOTAL*</b>	<b>\$5,148,121</b>	<b>\$2,345,594</b>	<b>\$7,493,715</b>	

**\*NOTE:** The original District Plan line item for Development Incentives & Property Grants did not include estimated interest payments on developer financed incentives, although that cost was reflected in projected District cash flows. That total from the original Plan was \$1,152,423. When comparing the estimated total Project Costs from the original Plan to the Amended Plan, it is necessary to include that additional amount. The actual increase in estimated Project Costs from the original Plan to the Amended Plan is the \$2,345,594 figure shown on the total line.

**\*\*NOTE:** The City expects to incur the following Project Costs inside of the District:

Project & Year	Estimated Cost
Fisk Alley <ul style="list-style-type: none"> <li>Paving (2025)</li> </ul>	\$26,000
Washington Street (Bennet to Richmond) <ul style="list-style-type: none"> <li>Underground Utilities (2023)</li> <li>Paving (2024)</li> </ul>	\$214,200 \$421,000
Locust Street (College to Franklin) <ul style="list-style-type: none"> <li>Underground Utilities (2023)</li> <li>Paving (2024)</li> </ul>	\$255,700 \$280,700
TOTAL	\$1,197,600

Refer to Section 8 for a map of proposed improvements and Public Works projects by development area.

### ***Section 10: Economic Feasibility Study, Financing Methods, and the Time When Costs or Monetary Obligations Related are to be Incurred***

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This Section includes a forecast of the incremental value increases expected within the District, estimated developer incentive payments, a summary of how municipal infrastructure improvements would be financed, and a projected cash flow demonstrating that the District is economically feasible.

As of January 1, 2020, the District had incremental value of \$3,710,700. The Plan assumes that \$20.8 million in additional incremental value will be created within the District by January 1, 2024 as a result of development projects proceeding within Development Areas #1, #2, and #5 as shown on **Table 1**. The City expects it may need to pay Development Incentives to make these private projects economically feasible. A projection of potential incentive payments is shown on **Table 2**. These payments would be made from tax increment cash (“pay as you go”) generated by the projects.

In addition to payment of incentives, the City has, and will, complete Municipal Infrastructure Improvements within the District. The City has, and will, finance these costs through a combination of tax increment and General Obligation debt. Actual and estimated debt service for paying the cost of the Municipal Infrastructure Projects are identified on **Table 3**.

**Table 4** is a projected cash flow for the District. Based on the incremental value expected to be created (**Table 1**), the District is projected to generate approximately \$13.3 million in tax increment revenue over its twenty-seven-year life. This assumes a tax rate increasing at ½% per year over the actual rate for the 2021 budget year. Considering the projected debt service (**Table 2**) and Development Incentive payments (**Table 3**), the District is projected to run a negative fund balance through the year 2034 before eventually generating a projected \$6.2 million surplus by its required closure date. The City will advance funds to the District as needed to cover the deficit fund balance and will charge the District interest on the advance.

The projected surplus fund balance indicates the District could close prior to the end of its maximum life; however, the City expects that development will occur within other identified Development Areas, and that the City may incur additional associated Project Costs. Additional development and incurrence of costs beyond what is shown in the projections included within this Section could increase or decrease the projected surplus fund balance and hasten or delay District closure. Under all circumstances, the District must make all Project Cost expenditures not later than the year 2039 and must close in 2044 with a final collection of tax increment for the 2045 budget year.

The cash flow exhibit does not include the costs of projects located outside of, but within ½ mile of the District's boundaries. These costs will be paid for initially from other sources. The extent to which the District may be able to offset a portion of these costs will be determined at a future date depending on District financial performance. Any contributions from the District towards these costs would reduce the projected surplus shown in the cash flow exhibit.

Based on the information included within this Section, the City concludes that the District remains economically feasible and that the City has the financial resources available to implement the Plan.

**TABLE 1  
TAX INCREMENT DISTRICT #12  
TAX INCREMENTS BY YEAR**

Valuation Year	TID Revenue Year	TID Value (1)	TID Base Value	TID Increment	Dev Area #1	Dev Area #2	Dev Area #5	Total TID Increment (1)
					Bela Dev LLC	Block 800 LLC	Greywolf Ptnrs	
2017	2018	\$ 22,974,900	\$ 22,974,900	\$ -	\$ -	\$ -	\$ -	\$ -
2018	2019	22,689,200	22,974,900	-	-	-	-	-
2019	2020	24,144,800	22,974,900	1,169,900	-	-	-	1,169,900
2020	2021	26,685,600	22,974,900	3,710,700	-	-	-	3,710,700
2021	2022	26,952,456	22,974,900	3,977,556	-	-	-	3,977,556
2022	2023	34,216,081 (2)	29,969,000	4,247,081	1,700,000	4,575,000	-	10,522,081
2023	2024	-	-	-	-	-	-	10,627,301
2024	2025	-	-	-	-	-	13,762,800	24,496,374
2025	2026	-	-	-	-	-	-	24,741,338
2026	2027	-	-	-	-	-	-	24,988,752
2027	2028	-	-	-	-	-	-	25,238,639
2028	2029	-	-	-	-	-	-	25,491,025
2029	2030	-	-	-	-	-	-	25,745,936
2030	2031	-	-	-	-	-	-	26,003,395
2031	2032	-	-	-	-	-	-	26,263,429
2032	2033	-	-	-	-	-	-	26,526,063
2033	2034	-	-	-	-	-	-	26,791,324
2034	2035	-	-	-	-	-	-	27,059,237
2035	2036	-	-	-	-	-	-	27,329,830
2036	2037	-	-	-	-	-	-	27,603,128
2037	2038	-	-	-	-	-	-	27,879,159
2038	2039	-	-	-	-	-	-	28,157,951
2039	2040	-	-	-	-	-	-	28,439,530
2040	2041	-	-	-	-	-	-	28,723,925
2041	2042	-	-	-	-	-	-	29,011,165
2042	2043	-	-	-	-	-	-	29,301,276
2043	2044	-	-	-	-	-	-	29,594,289
2044	2045	-	-	-	-	-	-	29,890,232
					<u>\$ 1,700,000</u>	<u>\$ 4,575,000</u>	<u>\$ 13,762,800</u>	

(1) TID values for the 2017-2020 valuation years are actual. TID values for valuation years 2021 and beyond projected to increase 1% annually.

(2) Both the TID value and TID base value increased \$6,994,100 due to transfer of parcels to TID #12 in 2021 as part of the TID #12 amendment.



**TABLE 2**  
**TAX INCREMENT DISTRICT #12**  
**ESTIMATED DEVELOPER INCENTIVE PAYMENTS**

Valuation Year	Budget Year	Dev Area #1 Developer TIF Payment McFleshmans	Dev Area #1 Developer TIF Payment Bela Dev LLC	Dev Area #2 Developer TIF Payment Block 800 LLC	Dev Area #5 Developer TIF Payment Greywolf Ptrns	Total Payments
2016	2017	\$ -	\$ -	\$ -	\$ -	\$ -
2017	2018	-	-	-	-	-
2018	2019	-	-	-	-	-
2019	2020	6,870	-	-	-	6,870
2020	2021	7,180	-	-	-	7,180
2021	2022	7,251	-	-	-	7,251
2022	2023	7,324	30,156	81,156	-	118,636
2023	2024	7,397	30,458	81,967	-	119,822
2024	2025	7,471	30,762	82,787	248,969	369,989
2025	2026	7,546	31,070	83,615	251,459	373,690
2026	2027	7,621	31,381	84,451	253,973	377,426
2027	2028	6,340	31,695	85,296	256,513	379,844
2028	2029	-	32,012	86,149	259,078	377,239
2029	2030	-	32,332	87,010	261,669	381,011
2030	2031	-	32,655	87,880	264,286	384,821
2031	2032	-	32,982	88,759	266,929	388,670
2032	2033	-	33,311	89,647	269,598	392,556
2033	2034	-	33,644	90,543	272,294	396,481
2034	2035	-	33,981	91,449	275,017	400,447
2035	2036	-	34,321	92,363	277,767	404,451
2036	2037	-	3,834	10,318	154,836	168,988
2037	2038	-	-	-	-	-
2038	2039	-	-	-	-	-
2039	2040	-	-	-	-	-
2040	2041	-	-	-	-	-
2041	2042	-	-	-	-	-
2042	2043	-	-	-	-	-
2043	2044	-	-	-	-	-
2044	2045	-	-	-	-	-
		<u>\$ 65,000</u>	<u>\$ 454,594</u>	<u>\$ 1,223,390</u>	<u>\$ 3,312,388</u>	<u>\$ 5,055,372</u>

Note: Actual amounts may differ due to changes in project timing, projected valuations, and equalized tax rates

**TABLE 3**  
**TAX INCREMENT DISTRICT #12**  
**GENERAL OBLIGATION DEBT**

Budget Year	\$450,000 2023 GO Notes		\$600,000 2024 GO Notes		Total Payments
	Principal	Interest	Principal	Interest	
	2017	\$ -	\$ -	\$ -	
2018	-	-	-	-	-
2019	-	-	-	-	-
2020	-	-	-	-	-
2021	-	-	-	-	-
2022	-	-	-	-	-
2023	-	-	-	-	-
2024	39,179	12,964	-	-	52,143
2025	40,370	11,773	52,238	17,286	121,667
2026	41,598	10,545	53,827	15,697	121,667
2027	42,863	9,279	55,464	14,060	121,666
2028	44,167	7,976	57,151	12,372	121,666
2029	45,510	6,632	58,889	10,634	121,665
2030	46,895	5,248	60,681	8,843	121,667
2031	48,321	3,822	62,526	6,997	121,666
2032	49,791	2,352	64,428	5,096	121,667
2033	51,306	837	66,388	3,136	121,667
2034	-	-	68,408	1,117	69,525
2035	-	-	-	-	-
2036	-	-	-	-	-
2037	-	-	-	-	-
2038	-	-	-	-	-
2039	-	-	-	-	-
2040	-	-	-	-	-
2041	-	-	-	-	-
2042	-	-	-	-	-
2043	-	-	-	-	-
2044	-	-	-	-	-
2045	-	-	-	-	-
	<u>\$ 450,000</u>	<u>\$ 71,428</u>	<u>\$ 600,000</u>	<u>\$ 95,238</u>	<u>\$ 1,216,666</u>

**TABLE 4**  
**TAX INCREMENT DISTRICT #12**  
**CASH FLOW PROFORMA**

Valuation Year	Budget Year	TID Increment	Tax Rate (1)	TIF Revenue	Other Revenues	Debt Proceeds	Admin Expense	General Obligation Debt Service	Project/Other Expenses	Developer Incentive Payments	Interest on General Fund Advance	Annual Surplus/ (Deficit)	Fund Balance
2016	2017	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (1,000)	\$ -	\$ -	\$ -	\$ (25)	\$ (1,025)	\$ (1,025)
2017	2018	-	-	-	131	-	(150)	-	(7,000)	-	(239)	(7,258)	(8,283)
2018	2019	-	-	-	37	-	(1,470)	-	(42,099)	-	(1,576)	(45,108)	(53,391)
2019	2020	1,169,900	21.2190	24,824	38	-	(1,396)	-	(32,175)	(6,870)	(3,793)	(19,372)	(72,763)
2020	2021	3,710,700	20.7044	76,828	343	-	(1,460)	-	(42,000)	(7,180)	(4,233)	22,298	(50,465)
2021	2022	3,977,556	20.8079	82,765	283	-	(1,460)	-	(42,000)	(7,251)	(2,733)	29,604	(20,861)
2022	2023	10,522,081	20.9120	220,037	333	450,000	(1,500)	-	(511,900)	(118,636)	(1,233)	37,101	16,240
2023	2024	10,627,301	21.0165	223,349	412	600,000	(1,500)	(52,143)	(743,700)	(119,822)	(2,983)	(96,386)	(80,147)
2024	2025	24,496,374	21.1216	517,403	475	-	(6,500)	(121,667)	(68,000)	(369,989)	(6,983)	(55,261)	(135,408)
2025	2026	24,741,338	21.2272	525,190	567	-	(1,500)	(121,667)	(42,000)	(373,690)	(9,233)	(22,333)	(157,741)
2026	2027	24,988,752	21.3333	533,094	629	-	(1,500)	(121,666)	(42,000)	(377,426)	(10,483)	(19,352)	(177,093)
2027	2028	25,238,639	21.4400	541,117	673	-	(1,500)	(121,666)	(42,000)	(379,844)	(11,483)	(14,703)	(191,796)
2028	2029	25,491,025	21.5472	549,261	753	-	(1,500)	(121,665)	(42,000)	(377,239)	(12,233)	(4,624)	(196,420)
2029	2030	25,745,936	21.6550	557,527	790	-	(1,500)	(121,667)	(42,000)	(381,011)	(12,483)	(344)	(196,764)
2030	2031	26,003,395	21.7632	565,918	819	-	(1,500)	(121,666)	(42,000)	(384,821)	(12,483)	4,267	(192,497)
2031	2032	26,263,429	21.8720	574,435	918	-	(1,500)	(121,667)	(42,000)	(388,670)	(12,483)	9,033	(183,464)
2032	2033	26,526,063	21.9814	583,080	1,089	-	(1,500)	(121,667)	(42,000)	(392,556)	(12,483)	13,964	(169,500)
2033	2034	26,791,324	22.0913	591,855	1,361	-	(1,500)	(69,525)	(42,000)	(396,481)	(11,233)	72,477	(97,023)
2034	2035	27,059,237	22.2018	600,763	1,910	-	(1,500)	-	(42,000)	(400,447)	(7,483)	151,243	54,220
2035	2036	27,329,830	22.3128	609,804	2,756	-	(1,500)	-	(42,000)	(404,451)	(2,491)	162,118	216,338
2036	2037	27,603,128	22.4243	618,982	6,294	-	(1,500)	-	(42,000)	(168,988)	-	412,788	629,125
2037	2038	27,879,159	22.5365	628,298	13,823	-	(1,500)	-	(42,000)	-	-	598,620	1,227,746
2038	2039	28,157,951	22.6491	637,753	22,873	-	(1,500)	-	(42,000)	-	-	617,127	1,844,872
2039	2040	28,439,530	22.7624	647,352	32,479	-	(6,500)	-	-	-	-	673,331	2,518,203
2040	2041	28,723,925	22.8762	657,094	42,690	-	(1,500)	-	-	-	-	698,284	3,216,488
2041	2042	29,011,165	22.9906	666,984	53,238	-	(1,500)	-	-	-	-	718,722	3,935,210
2042	2043	29,301,276	23.1055	677,022	64,095	-	(1,500)	-	-	-	-	739,616	4,674,826
2043	2044	29,594,289	23.2211	687,211	75,265	-	(1,500)	-	-	-	-	760,976	5,435,802
2044	2045	29,890,232	23.3372	697,553	86,720	-	(6,500)	-	-	-	-	777,773	6,213,575
				<u>13,295,497</u>	<u>411,794</u>	<u>1,050,000</u>	<u>(56,436)</u>	<u>(1,216,666)</u>	<u>(2,076,874)</u>	<u>(5,055,372)</u>	<u>(138,367)</u>	<u>6,213,575</u>	

(1) Tax rate projected to increase 1/2% annually beginning in 2021

## ***Section 11: Annexed Property***

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A tax incremental district cannot include annexed territory unless at least three years have elapsed since the annexation, or certain other requirements are met. None of the territory being added to the District as part of this Plan Amendment was annexed to the City in the preceding three years.

## ***Section 12: Proposed Zoning Ordinance Changes***

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The proposed Plan Amendment is in general conformance with the City's current zoning ordinances. Individual properties may require rezoning at the time of development.

## ***Section 13: Proposed Changes in Master Plan, Map, Building Codes and Ordinances***

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The proposed Plan Amendment is in general conformance with the City's Comprehensive Plan. Development within the District will be required to conform to State Building Codes and will be subject to the City's permitting and inspection procedures. The proposed Plan conforms to all relevant State and local ordinances, plans, and codes. No changes to the existing regulations are proposed or needed.

## ***Section 14: Relocation***

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The City does not expect that the continued implementation of the Plan will cause a need to relocate persons or businesses. In the event relocation becomes necessary at some time during the implementation period, the City will take the following steps and actions as required by Wisconsin Statutes Section 32:

1. Before negotiations begin for the acquisition of property or easements, all property owners will be provided with an informational pamphlet "The Rights of Landowners" prepared by the Wisconsin Department of Administration, and if any person is to be displaced as a result of the acquisition, they will be given a pamphlet on "Relocation Rights" prepared by the Wisconsin Department of Administration.
2. The City will provide each owner a full narrative appraisal, a map showing the owners of all property affected by the proposed project, and a list of all or at least ten neighboring landowners to whom offers are being made.

3. The City will file a relocation plan with the Wisconsin Department of Administration and will keep all records as required in Wisconsin Statutes Section 32.

## ***Section 15: Orderly Development of the City***

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Amendment of the District contributes to the orderly development of the City by providing for the elimination of blighting influences, the rehabilitation and the redevelopment of underutilized properties along the West College Avenue corridor, and by providing for continued growth in residential, office, and retail development. By improving and maintaining an attractive area for private investment along the corridor, the City will ensure a healthy tax base, job growth/creation and a more vibrant economy.

The Amended Plan is complimentary to the adopted City of Appleton's *Comprehensive Plan 2010-2030* (Comprehensive Plan), specifically Chapter 14 Downtown Plan that identifies the corridor of West College Avenue for reinvestment, rehabilitation and redevelopment. The City's recommendations for this corridor and surrounding downtown sites include the following key strategies as adopted on March 15, 2017 in the updated Comprehensive Plan. These key strategies, and the detailed policies to support these efforts, can be found in the Comprehensive Plan – Chapter 14 Downtown Plan Initiatives Section from pages 335 to 362:

- 1.1 *Continue development of entry features on major routes into the downtown.*
- 1.3 *Implement appropriate streetscaping projects throughout the downtown.*
- 1.5 *Continue to encourage quality urban design throughout the downtown through voluntary measures.*
- 2.2 *Pursue opportunities to attract more artists and arts-related businesses to the downtown.*
- 3.1 *Encourage mixed-use and mid-density residential redevelopment on under-utilized or marginal sites on the edge of downtown.*
- 3.3 *Promote development of neighborhood serving businesses and amenities to meet the basic shopping and service needs of downtown and nearby residents.*
- 3.10 *Promote well-designed transitional areas between higher density development downtown and lower density development in adjacent, largely single-family neighborhoods.*
- 4.1 *Sustain and grow the retail niches which have formed downtown.*
- 4.2 *Identify and aggressively recruit target industries.*
- 4.3 *Protect the existing retail blocks on College Avenue.*
- 4.5 *Facilitate and pursue entrepreneurial business development in the downtown.*
- 4.6 *Create opportunities for smaller offices and business services to locate downtown, including north of College Avenue.*
- 4.7 *Maintain an environment favorable to larger employers in the downtown.*
- 4.8 *Support private sector efforts to redevelop and invest in downtown.*

## ***Section 16: List of Estimated Non-Project Costs***

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Non-Project Costs are public works projects which only partly benefit the District. Costs incurred that do not benefit the District may not be paid with tax increments. Examples of non-project costs are:

- A public improvement made within the District that also benefits property outside the District. That portion of the total Project Costs allocable to properties outside of the District would be a nonproject cost.
- A public improvement made outside the District that only partially benefits property within the District. That portion of the total Project Costs allocable to properties outside of the District would be a non-project cost.
- Projects undertaken within the District as part of the implementation of this Project Plan, the costs of which are paid fully or in part by impact fees, grants, special assessments, or revenues other than tax increments.

No improvements to be made within the District will benefit property outside the District. Furthermore, there will be no improvements made outside the District that will only partially benefit the District.



**Section 17: Opinion of Attorney for the City of Appleton Advising Whether the Plan is Complete and Complies with Wisconsin Statutes 66.1105**



**LEGAL SERVICES DEPARTMENT**

**Office of the City Attorney**

100 North Appleton Street  
Appleton, WI 54911  
Phone: 920/832-6423  
Fax: 920/832-5962

June 28, 2021

Mayor Jacob A. Woodford  
City of Appleton  
100 North Appleton Street  
Appleton, WI 54911-4799

Re: Tax Increment Finance Program Plan, City of Appleton  
Tax Incremental District #12

Dear Mayor Woodford:

You have asked me for a legal opinion as to the legal sufficiency and statutory compliance of the proposed Tax Incremental Financing District #12 Project Plan Amendment for the City of Appleton Tax Incremental District #12. I have reviewed the Project Plan Amendment for said District as well as the appendices attached thereto, specifically as to their compliance with the provision of Section 66.1105(4), Wisconsin Statutes. It is my opinion that the Project Plan Amendment is in compliance with all of the provisions of Section 66.1105(4) of the Wisconsin Statutes dealing with the creation of Tax Incremental Financing Districts.

If you have any questions concerning this matter, please contact me at your earliest convenience.

Sincerely,

Christopher R. Behrens  
City Attorney

CRB:jljg

Christopher R. Behrens  
*City Attorney*

Amanda Abshire  
*Deputy City Attorney*

Darrin M. Glad  
*Assistant City Attorney*

Nicholas J. Vande Castle  
*Assistant City Attorney*

**Section 18: Calculation of the Share of Projected Tax Increments  
Estimated to be Paid by the Owners of Property in the Overlying  
Taxing Jurisdictions**

The following projection is provided to meet the requirements of Wis. Stat. § 66.1105(4)(i)4. Allocation percentages based on 2020 Statement of Taxes.

Budget Year	Tax Increment Revenue	City of Appleton 40.30%	Outagamie County 17.04%	Appleton School District 37.81%	FVTC 4.85%
2020	\$ 24,824	\$ 10,005	\$ 4,230	\$ 9,386	\$ 1,204
2021	\$ 76,828	\$ 30,965	\$ 13,091	\$ 29,047	\$ 3,725
2022	\$ 82,765	\$ 33,358	\$ 14,102	\$ 31,292	\$ 4,013
2023	\$ 220,037	\$ 88,684	\$ 37,492	\$ 83,192	\$ 10,670
2024	\$ 223,349	\$ 90,019	\$ 38,056	\$ 84,444	\$ 10,830
2025	\$ 517,403	\$ 208,534	\$ 88,159	\$ 195,620	\$ 25,089
2026	\$ 525,190	\$ 211,673	\$ 89,486	\$ 198,564	\$ 25,466
2027	\$ 533,094	\$ 214,859	\$ 90,833	\$ 201,553	\$ 25,850
2028	\$ 541,117	\$ 218,092	\$ 92,200	\$ 204,586	\$ 26,239
2029	\$ 549,261	\$ 221,374	\$ 93,588	\$ 207,665	\$ 26,633
2030	\$ 557,527	\$ 224,706	\$ 94,996	\$ 210,791	\$ 27,034
2031	\$ 565,918	\$ 228,088	\$ 96,426	\$ 213,963	\$ 27,441
2032	\$ 574,435	\$ 231,521	\$ 97,877	\$ 217,183	\$ 27,854
2033	\$ 583,080	\$ 235,005	\$ 99,350	\$ 220,452	\$ 28,273
2034	\$ 591,855	\$ 238,542	\$ 100,845	\$ 223,770	\$ 28,699
2035	\$ 600,763	\$ 242,132	\$ 102,363	\$ 227,137	\$ 29,131
2036	\$ 609,804	\$ 245,776	\$ 103,903	\$ 230,556	\$ 29,569
2037	\$ 618,982	\$ 249,475	\$ 105,467	\$ 234,026	\$ 30,014
2038	\$ 628,298	\$ 253,230	\$ 107,055	\$ 237,548	\$ 30,466
2039	\$ 637,753	\$ 257,041	\$ 108,666	\$ 241,123	\$ 30,924
2040	\$ 647,352	\$ 260,909	\$ 110,301	\$ 244,752	\$ 31,390
2041	\$ 657,094	\$ 264,836	\$ 111,961	\$ 248,435	\$ 31,862
2042	\$ 666,984	\$ 268,822	\$ 113,646	\$ 252,174	\$ 32,342
2043	\$ 677,022	\$ 272,867	\$ 115,357	\$ 255,969	\$ 32,829
2044	\$ 687,211	\$ 276,974	\$ 117,093	\$ 259,822	\$ 33,323
2045	\$ 697,553	\$ 281,142	\$ 118,855	\$ 263,732	\$ 33,824
<b>Totals</b>	<b>\$ 13,295,497</b>	<b>\$ 5,358,627</b>	<b>\$ 2,265,396</b>	<b>\$ 5,026,780</b>	<b>\$ 644,693</b>

<b>Form PE-300</b>	<b>TID Annual Report</b>	<b>2020 WI Dept of Revenue</b>
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<b>Section 1 - Municipality and TID</b>					
Co-muni code <b>44201</b>	Municipality <b>APPLETON</b>		County <b>OUTAGAMIE</b>	Due date <b>07/01/2021</b>	Report type <b>ORIGINAL</b>
TID number <b>003</b>	TID type <b>1D</b>	TID name <b>n/a</b>	Creation date <b>11/04/1992</b>	Mandatory termination date <b>11/04/2029</b>	Expected termination date <b>N/A</b>

<b>Section 2 - Beginning Balance</b>	<b>Amount</b>
<b>TID fund balance at beginning of year</b>	<b>\$-4,158,727</b>

<b>Section 3 - Revenue</b>	<b>Amount</b>
<b>Tax increment</b>	\$1,102,512
<b>Investment income</b>	\$9,127
<b>Debt proceeds</b>	\$0
<b>Special assessments</b>	\$0
<b>Shared revenue</b>	\$8,734
<b>Sale of property</b>	\$0
<b>Allocation from another TID</b>	
<b>Developer guarantees</b>	
<b>Transfer from other funds</b>	
<b>Grants</b>	
<b>Other revenue</b>	
Source                      Payment in Lieu of Tax	\$25,000
<b>Total Revenue (deposits)</b>	<b>\$1,145,373</b>

Form PE-300	<b>TID Annual Report</b>	<b>2020</b> WI Dept of Revenue
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Section 4 - Expenditures	Amount
Capital expenditures	\$0
Administration	\$0
Professional services	\$1,246
Interest and fiscal charges	\$195,871
DOR fees	\$1,150
Discount on long-term debt	\$0
Debt issuance costs	\$0
Principal on long-term debt	\$0
Environmental costs	\$0
Real property assembly costs	\$0
Allocation to another TID	
Developer grants	
Developer name n/a	\$0
Transfer to other funds	
Other expenditures	
<b>Total Expenditures</b>	<b>\$198,267</b>

Section 5 - Ending Balance	Amount
TID fund balance at end of year	\$-3,211,621
Future costs	\$0
Future revenue	\$0
Surplus or deficit	\$-3,211,621

Section 6 - Preparer/Contact Information	
Preparer name <b>Anthony Saucerman</b>	Preparer title <b>Finance Director</b>
Preparer email <b>tony.saucerman@appleton.org</b>	Preparer phone <b>(920) 832-6440</b>
Contact name <b>Anthony Saucerman</b>	Contact title <b>Finance Director</b>
Contact email <b>tony.saucerman@appleton.org</b>	Contact phone <b>(920) 832-6440</b>

<b>Form PE-300</b>	<b>TID Annual Report</b>	<b>2020</b> WI Dept of Revenue
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<b>Submission Information</b>	
Co-muni code	<b>44201</b>
TID number	<b>003</b>
Submission date	<b>06-23-2021 03:43 PM</b>
Confirmation	<b>TIDAR20201206O1617998898475</b>
Submission type	<b>ORIGINAL</b>

<b>Form PE-300</b>	<b>TID Annual Report</b>	<b>2020</b> WI Dept of Revenue
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Section 1 - Municipality and TID					
Co-muni code <b>44201</b>	Municipality <b>APPLETON</b>		County <b>OUTAGAMIE</b>	Due date <b>07/01/2021</b>	Report type <b>ORIGINAL</b>
TID number <b>008</b>	TID type <b>2</b>	TID name <b>n/a</b>	Creation date <b>05/20/2009</b>	Mandatory termination date <b>05/20/2036</b>	Expected termination date <b>N/A</b>

Section 2 - Beginning Balance	Amount
TID fund balance at beginning of year	<b>\$-104,900</b>

Section 3 - Revenue	Amount
Tax increment	\$1,077,616
Investment income	\$20,152
Debt proceeds	\$0
Special assessments	\$0
Shared revenue	\$5,706
Sale of property	\$0
Allocation from another TID	
Developer guarantees	
Transfer from other funds	
Grants	
Other revenue	
Source           Riverheath Debt Payment Contribution	\$165,000
<b>Total Revenue (deposits)</b>	<b>\$1,268,474</b>



Form PE-300	<b>TID Annual Report</b>	<b>2020</b> WI Dept of Revenue
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Section 4 - Expenditures	Amount
Capital expenditures	\$0
Administration	\$0
Professional services	\$1,246
Interest and fiscal charges	\$23,564
DOR fees	\$150
Discount on long-term debt	\$0
Debt issuance costs	\$0
Principal on long-term debt	\$245,000
Environmental costs	\$0
Real property assembly costs	\$0
Allocation to another TID	
Developer grants	
Developer name   Eagle Flats, LLC	\$64,399
Developer name   Riverheath, LLC	\$566,030
Developer name   Eagle Point Development	\$311,802
Transfer to other funds	
Other expenditures	
<b>Total Expenditures</b>	<b>\$1,212,191</b>

Section 5 - Ending Balance	Amount
TID fund balance at end of year	\$-48,617
Future costs	\$0
Future revenue	\$0
Surplus or deficit	\$-48,617

Section 6 - Preparer/Contact Information	
Preparer name <b>Anthony Saucerman</b>	Preparer title <b>Finance Director</b>
Preparer email <b>tony.saucerman@appleton.org</b>	Preparer phone <b>(920) 832-6440</b>
Contact name <b>Anthony Saucerman</b>	Contact title <b>Finance Director</b>
Contact email <b>tony.saucerman@appleton.org</b>	Contact phone <b>(920) 832-6440</b>

<b>Form PE-300</b>	<b>TID Annual Report</b>	<b>2020</b> WI Dept of Revenue
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<b>Submission Information</b>	
Co-muni code	<b>44201</b>
TID number	<b>008</b>
Submission date	<b>06-23-2021 03:47 PM</b>
Confirmation	<b>TIDAR20201206O1618000544276</b>
Submission type	<b>ORIGINAL</b>

<b>Form PE-300</b>	<b>TID Annual Report</b>	<b>2020 WI Dept of Revenue</b>
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<b>Section 1 - Municipality and TID</b>					
Co-muni code <b>44201</b>	Municipality <b>APPLETON</b>		County <b>OUTAGAMIE</b>	Due date <b>07/01/2021</b>	Report type <b>ORIGINAL</b>
TID number <b>009</b>	TID type <b>2</b>	TID name <b>n/a</b>	Creation date <b>09/18/2013</b>	Mandatory termination date <b>09/18/2040</b>	Expected termination date <b>N/A</b>

<b>Section 2 - Beginning Balance</b>	<b>Amount</b>
<b>TID fund balance at beginning of year</b>	<b>\$262,033</b>

<b>Section 3 - Revenue</b>	<b>Amount</b>
<b>Tax increment</b>	\$0
<b>Investment income</b>	\$7,546
<b>Debt proceeds</b>	\$0
<b>Special assessments</b>	\$0
<b>Shared revenue</b>	\$110,287
<b>Sale of property</b>	\$0
<b>Allocation from another TID</b>	
<b>Developer guarantees</b>	
<b>Transfer from other funds</b>	
<b>Grants</b>	
<b>Other revenue</b>	
<b>Total Revenue (deposits)</b>	<b>\$117,833</b>

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Section 4 - Expenditures	Amount
Capital expenditures	\$0
Administration	\$0
Professional services	\$1,246
Interest and fiscal charges	\$0
DOR fees	\$150
Discount on long-term debt	\$0
Debt issuance costs	\$0
Principal on long-term debt	\$0
Environmental costs	\$0
Real property assembly costs	\$0
Allocation to another TID	
Developer grants	
Developer name    Union Square Apartments, LLC	\$29,524
Transfer to other funds	
Other expenditures	
<b>Total Expenditures</b>	<b>\$30,920</b>

Section 5 - Ending Balance	Amount
TID fund balance at end of year	\$348,946
Future costs	\$0
Future revenue	\$0
Surplus or deficit	\$348,946

Section 6 - Preparer/Contact Information	
Preparer name <b>Anthony Saucerman</b>	Preparer title <b>Finance Director</b>
Preparer email <b>tony.saucerman@appleton.org</b>	Preparer phone <b>(920) 832-6440</b>
Contact name <b>Anthony Saucerman</b>	Contact title <b>Finance Director</b>
Contact email <b>tony.saucerman@appleton.org</b>	Contact phone <b>(920) 832-6440</b>

<b>Form PE-300</b>	<b>TID Annual Report</b>	<b>2020</b> WI Dept of Revenue
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<b>Submission Information</b>	
Co-muni code	<b>44201</b>
TID number	<b>009</b>
Submission date	<b>06-23-2021 03:58 PM</b>
Confirmation	<b>TIDAR20201206O1618001789353</b>
Submission type	<b>ORIGINAL</b>

<b>Form PE-300</b>	<b>TID Annual Report</b>	<b>2020</b> WI Dept of Revenue
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<b>Section 1 - Municipality and TID</b>					
Co-muni code <b>44201</b>	Municipality <b>APPLETON</b>		County <b>OUTAGAMIE</b>	Due date <b>07/01/2021</b>	Report type <b>ORIGINAL</b>
TID number <b>010</b>	TID type <b>2</b>	TID name <b>n/a</b>	Creation date <b>09/18/2013</b>	Mandatory termination date <b>09/18/2040</b>	Expected termination date <b>N/A</b>

<b>Section 2 - Beginning Balance</b>	<b>Amount</b>
<b>TID fund balance at beginning of year</b>	<b>\$98,825</b>

<b>Section 3 - Revenue</b>	<b>Amount</b>
<b>Tax increment</b>	\$0
<b>Investment income</b>	\$2,752
<b>Debt proceeds</b>	\$0
<b>Special assessments</b>	\$0
<b>Shared revenue</b>	\$5,163
<b>Sale of property</b>	\$0
<b>Allocation from another TID</b>	
<b>Developer guarantees</b>	
<b>Transfer from other funds</b>	
<b>Grants</b>	
<b>Other revenue</b>	
<b>Total Revenue (deposits)</b>	<b>\$7,915</b>



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Section 4 - Expenditures	Amount
Capital expenditures	\$0
Administration	\$0
Professional services	\$1,246
Interest and fiscal charges	\$0
DOR fees	\$150
Discount on long-term debt	\$0
Debt issuance costs	\$0
Principal on long-term debt	\$0
Environmental costs	\$0
Real property assembly costs	\$0
Allocation to another TID	
Developer grants	
Developer name n/a	\$0
Transfer to other funds	
Other expenditures	
<b>Total Expenditures</b>	<b>\$1,396</b>

Section 5 - Ending Balance	Amount
TID fund balance at end of year	\$105,344
Future costs	\$0
Future revenue	\$0
Surplus or deficit	\$105,344

Section 6 - Preparer/Contact Information	
Preparer name <b>Anthony Saucerman</b>	Preparer title <b>Finance Director</b>
Preparer email <b>tony.saucerman@appleton.org</b>	Preparer phone <b>(920) 832-6440</b>
Contact name <b>Anthony Saucerman</b>	Contact title <b>Finance Director</b>
Contact email <b>tony.saucerman@appleton.org</b>	Contact phone <b>(920) 832-6440</b>

<b>Form PE-300</b>	<b>TID Annual Report</b>	<b>2020</b> WI Dept of Revenue
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<b>Submission Information</b>	
Co-muni code	44201
TID number	010
Submission date	06-23-2021 04:00 PM
Confirmation	TIDAR20201206O1618003294316
Submission type	ORIGINAL

<b>Form PE-300</b>	<b>TID Annual Report</b>	<b>2020 WI Dept of Revenue</b>
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<b>Section 1 - Municipality and TID</b>					
Co-muni code <b>44201</b>	Municipality <b>APPLETON</b>		County <b>OUTAGAMIE</b>	Due date <b>07/01/2021</b>	Report type <b>ORIGINAL</b>
TID number <b>011</b>	TID type <b>2</b>	TID name <b>TID 11</b>	Creation date <b>08/02/2017</b>	Mandatory termination date <b>08/02/2044</b>	Expected termination date <b>N/A</b>

<b>Section 2 - Beginning Balance</b>	<b>Amount</b>
<b>TID fund balance at beginning of year</b>	<b>\$-1,096,330</b>

<b>Section 3 - Revenue</b>	<b>Amount</b>
<b>Tax increment</b>	\$34,029
<b>Investment income</b>	\$204
<b>Debt proceeds</b>	\$0
<b>Special assessments</b>	\$0
<b>Shared revenue</b>	\$0
<b>Sale of property</b>	\$0
<b>Allocation from another TID</b>	
<b>Developer guarantees</b>	
<b>Transfer from other funds</b>	
<b>Grants</b>	
<b>Other revenue</b>	
Source                      Developer Property Option Fee	\$1,000
<b>Total Revenue (deposits)</b>	<b>\$35,233</b>

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Section 4 - Expenditures	Amount
Capital expenditures	\$53,527
Administration	\$0
Professional services	\$1,246
Interest and fiscal charges	\$49,365
DOR fees	\$1,150
Discount on long-term debt	\$0
Debt issuance costs	\$0
Principal on long-term debt	\$0
Environmental costs	\$0
Real property assembly costs	\$0
Allocation to another TID	
Developer grants	
Developer name    N/A	\$0
Transfer to other funds	
Other expenditures	
Name                    Business Improvement Grants	\$50,950
<b>Total Expenditures</b>	<b>\$156,238</b>

Section 5 - Ending Balance	Amount
TID fund balance at end of year	\$-1,217,335
Future costs	\$0
Future revenue	\$0
Surplus or deficit	\$-1,217,335

Section 6 - Preparer/Contact Information	
Preparer name <b>Anthony Saucerman</b>	Preparer title <b>Finance Director</b>
Preparer email <b>tony.saucerman@appleton.org</b>	Preparer phone <b>(920) 832-6440</b>
Contact name <b>Anthony Saucerman</b>	Contact title <b>Finance Director</b>
Contact email <b>tony.saucerman@appleton.org</b>	Contact phone <b>(920) 832-6440</b>

<b>Form PE-300</b>	<b>TID Annual Report</b>	<b>2020</b> WI Dept of Revenue
------------------------	--------------------------	-----------------------------------

<b>Submission Information</b>	
Co-muni code	<b>44201</b>
TID number	<b>011</b>
Submission date	<b>06-23-2021 04:01 PM</b>
Confirmation	<b>TIDAR20201206O1618004473773</b>
Submission type	<b>ORIGINAL</b>

<b>Form PE-300</b>	<b>TID Annual Report</b>	<b>2020 WI Dept of Revenue</b>
------------------------	--------------------------	------------------------------------

<b>Section 1 - Municipality and TID</b>					
Co-muni code <b>44201</b>	Municipality <b>APPLETON</b>		County <b>OUTAGAMIE</b>	Due date <b>07/01/2021</b>	Report type <b>ORIGINAL</b>
TID number <b>012</b>	TID type <b>3</b>	TID name <b>TIF 12</b>	Creation date <b>08/02/2017</b>	Mandatory termination date <b>08/02/2044</b>	Expected termination date <b>N/A</b>

<b>Section 2 - Beginning Balance</b>	<b>Amount</b>
<b>TID fund balance at beginning of year</b>	<b>\$-53,391</b>

<b>Section 3 - Revenue</b>	<b>Amount</b>
<b>Tax increment</b>	\$24,824
<b>Investment income</b>	\$38
<b>Debt proceeds</b>	\$0
<b>Special assessments</b>	\$0
<b>Shared revenue</b>	\$0
<b>Sale of property</b>	\$0
<b>Allocation from another TID</b>	
<b>Developer guarantees</b>	
<b>Transfer from other funds</b>	
<b>Grants</b>	
<b>Other revenue</b>	
<b>Total Revenue (deposits)</b>	<b>\$24,862</b>



Form PE-300	<b>TID Annual Report</b>	<b>2020</b> WI Dept of Revenue
----------------	--------------------------	-----------------------------------

Section 4 - Expenditures	Amount
Capital expenditures	\$0
Administration	\$0
Professional services	\$1,246
Interest and fiscal charges	\$3,793
DOR fees	\$150
Discount on long-term debt	\$0
Debt issuance costs	\$0
Principal on long-term debt	\$0
Environmental costs	\$0
Real property assembly costs	\$0
Allocation to another TID	
Developer grants	
Developer name    N/A	\$0
Transfer to other funds	
Other expenditures	
Name                    Business Improvement Grants	\$39,045
<b>Total Expenditures</b>	<b>\$44,234</b>

Section 5 - Ending Balance	Amount
TID fund balance at end of year	<b>\$-72,763</b>
Future costs	<b>\$0</b>
Future revenue	<b>\$0</b>
Surplus or deficit	<b>\$-72,763</b>

Section 6 - Preparer/Contact Information	
Preparer name <b>Anthony Saucerman</b>	Preparer title <b>Finance Director</b>
Preparer email <b>tony.saucerman@appleton.org</b>	Preparer phone <b>(920) 832-6440</b>
Contact name <b>Anthony Saucerman</b>	Contact title <b>Finance Director</b>
Contact email <b>tony.saucerman@appleton.org</b>	Contact phone <b>(920) 832-6440</b>

<b>Form PE-300</b>	<b>TID Annual Report</b>	<b>2020</b> WI Dept of Revenue
------------------------	--------------------------	-----------------------------------

<b>Submission Information</b>	
Co-muni code	44201
TID number	012
Submission date	06-23-2021 04:03 PM
Confirmation	TIDAR20201206O1618001471246
Submission type	ORIGINAL



Photo by Dolores Howse  
(a top 12 winner of the "Images of Hope" Houdini Plaza Welcome Tower photo contest)



**CITY OF APPLETON**  
**Community & Economic  
Development Department**  
*March 10, 2021*

# GROWTH REPORT

## 2020

# CITY OFFICIALS

Jacob A. Woodford, Mayor  
Christopher Behrens, City Attorney  
Kami Lynch, City Clerk

## 2020 COMMON COUNCIL

District 1: William Siebers  
District 2: Vered Meltzer  
District 3: Brad Firkus  
District 4: Joe Martin  
District 5: Katie Van Zeeland  
District 6: Denise Fenton  
District 7: Maiyoua Thao  
District 8: Matthew Reed  
District 9: Alex Schultz  
District 10: Michael Smith  
District 11: Patti Coenen  
District 12: Nate Wolff  
District 13: Kyle Lobner  
District 14: Joe Prohaska, Jr.  
District 15: Corey Otis

## COMMUNITY & ECONOMIC DEVELOPMENT DEPARTMENT

Karen Harkness, Director  
Monica Stage, Deputy Director  
Matt Rehbein, Economic Development Specialist  
Laura Bonnet, Housing Coordinator  
David Kress, Principal Planner  
Don Harp, Principal Planner  
Jessica Titel, Principal Planner  
Nikki Gerhard, Grants Administrator  
Ryne Lodl, Coordinated Entry Specialist  
Mark Lund, GIS Specialist  
Jessica Schneider, GIS Specialist  
Heath Anderson, GIS Specialist  
DeAnn Brosman, City Assessor  
Tim Smith, Property Assessor  
Dan Steenbock, Property Assessor  
Matt Tooke, Property Assessor  
Lona Thelen, Personal Property Clerk  
Karen Pietila, Real Estate Assessment Clerk  
Brenda Broeske, Administrative Assistant

City of Appleton, Community & Economic Development Department, 100 N. Appleton Street, Appleton WI 54911  
TEL (920) 832-6468 FAX (920) 832-5994 [www.appleton.org](http://www.appleton.org) [www.facebook.com/appletoncityhall](https://www.facebook.com/appletoncityhall)

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## INTRODUCTION

Each year, the Community and Economic Development Department prepares an Annual Growth Report (Report). The purpose of the Report is to analyze growth figures over a period of ten years to determine if Appleton is capturing its historically proportionate share of growth. The Report looks at Appleton's building permit activity, equalized valuation, and net new construction and compares them with the Fox Cities region. Equalized value is the estimated value of all taxable real and personal property in each taxation district by class of property. This Report will compare the City of Appleton to other comparable cities in the State of Wisconsin and throughout the United States that we compete with for jobs and economic development. Other areas addressed include: success in target growth areas, prospects for growth, barriers that need to be overcome to continue growth, and a synopsis of the marketing efforts taken to promote growth.

Over the past few years, we have been placing an increased focus on net new construction and a reduced focus on construction permit data. Construction permit data tends to be the most volatile, and reporting can be inconsistent or duplicated. Net new construction, on the other hand, is defined and standardized by the State of Wisconsin and has a direct bearing on the City's tax levy and ability to collect income.

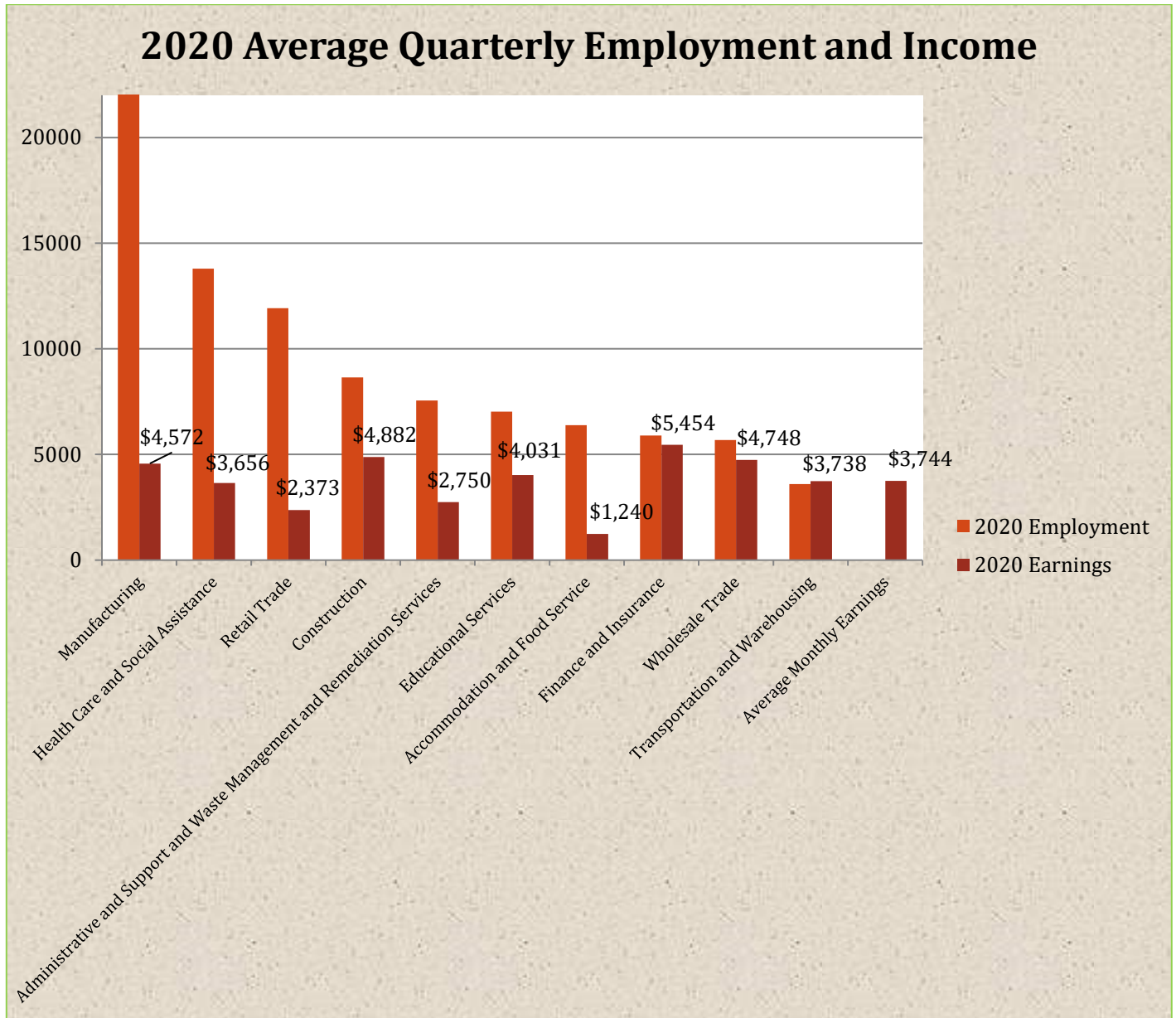
## INCOME

According to ESRI [supplier of geographic information system (GIS) applications] data, the median household income for the City of Appleton in 2020 was \$58,771, which is slightly below the median household income of \$60,185 for the State of Wisconsin and the U.S. average of \$62,203.

## LABOR STATISTICS

The City of Appleton and the Appleton Metropolitan Statistical Area (MSA), defined by the Office of Management and Budget (OMB) as Outagamie and Calumet Counties, has a well-established labor force and is known internationally for its industry clusters of food processing, paper industry and manufacturing. The following chart shows the average quarterly employment by industry for the top 10 classifications and average monthly income within the Appleton MSA for 2020 (monthly earnings included in chart).





Source: US Census Bureau – Local Employment Dynamics

Manufacturing shows the highest quarterly employment, followed by Health Care and Social Assistance, then Retail Trade.

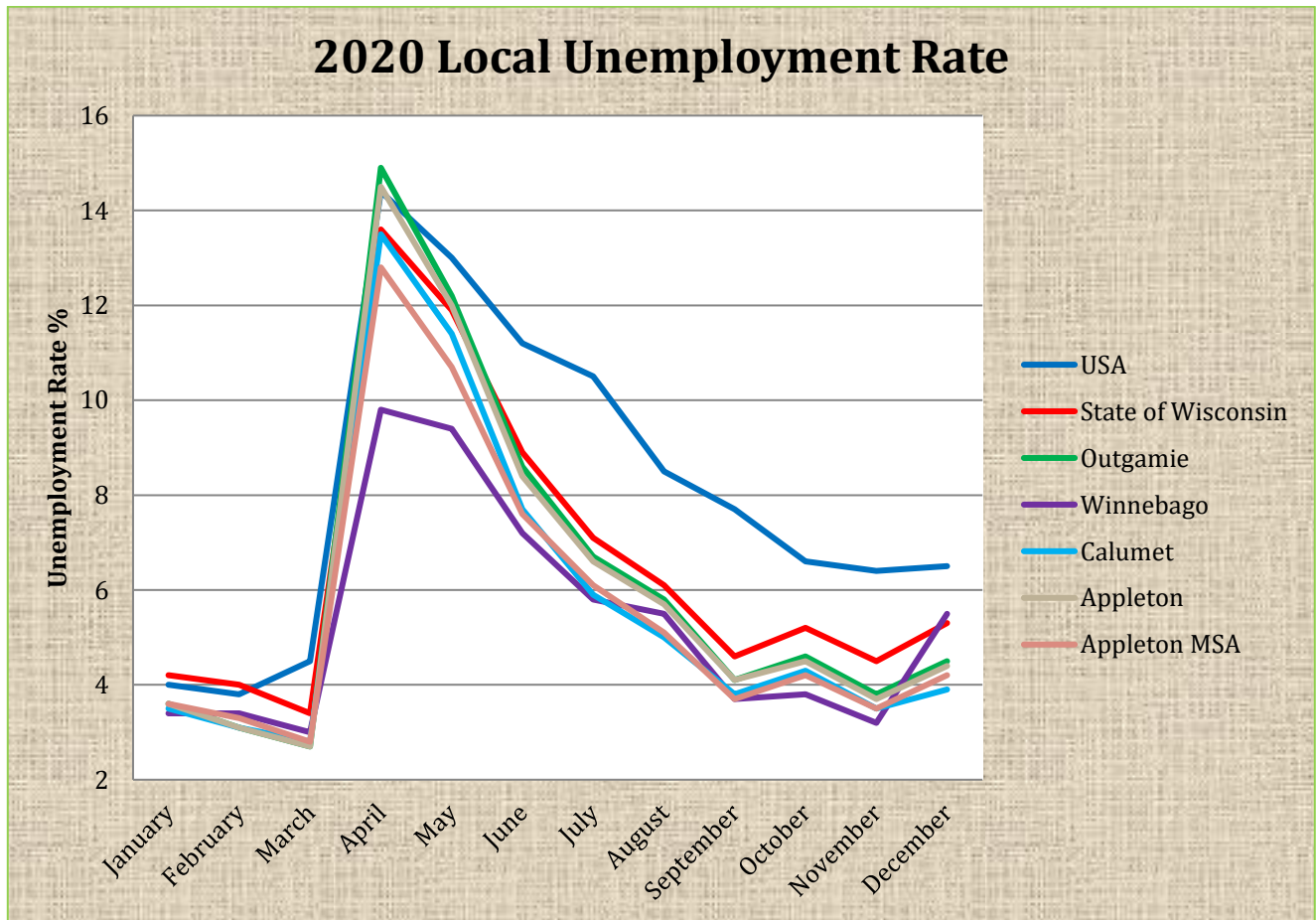
Average monthly earnings ranged from \$1,240 to \$5,454 per position for the top ten employment sectors represented. As a reference point, the U.S. Department of Housing and Urban Development (HUD) considers a monthly gross household income of \$5,758.33 or less to be low income for a family of four in the Appleton MSA; a household comprised of 1 individual is considered low income if under \$4,033.33 per month per HUD <https://www.huduser.gov/portal/datasets/il/il2020/select Geography.odn>. It is worthy of

note that 5 of the top 10 employment sectors by number of jobs provide earnings less than the \$3,744 average across all 10 employment categories.

It is important that we continue to invest in the necessary infrastructure, economic support, and educational systems to continue the growth of high wage industries to keep the income levels up in our community.

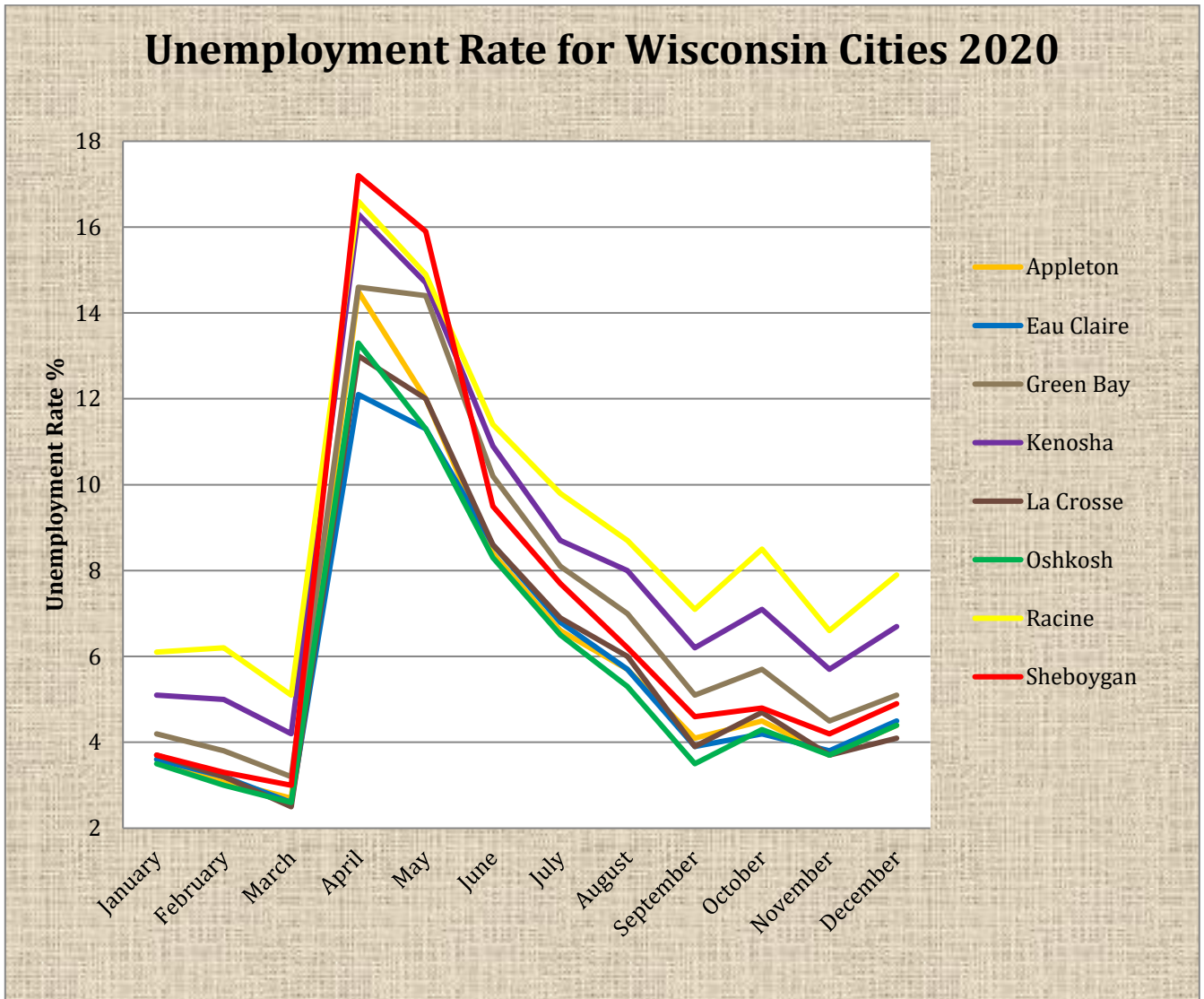
## UNEMPLOYMENT

Like most markets, the City of Appleton unemployment rate saw significant fluctuation due to COVID-19 (coronavirus disease) last year. The City started January 2020 at 3.6% unemployment, with a high of 14.5% in April, and concluded the year at 4.4%. The average 2020 unemployment rate for Appleton was 6.1%. Included in the chart are the comparable unemployment rates for the United States, the State of Wisconsin, Appleton MSA, and the counties of Winnebago, Outagamie, and Calumet. The unemployment rate for the City of Appleton consists of persons who file an unemployment claim and live within the corporate City limits of Appleton.



Source: State of Wisconsin Department of Workforce Development

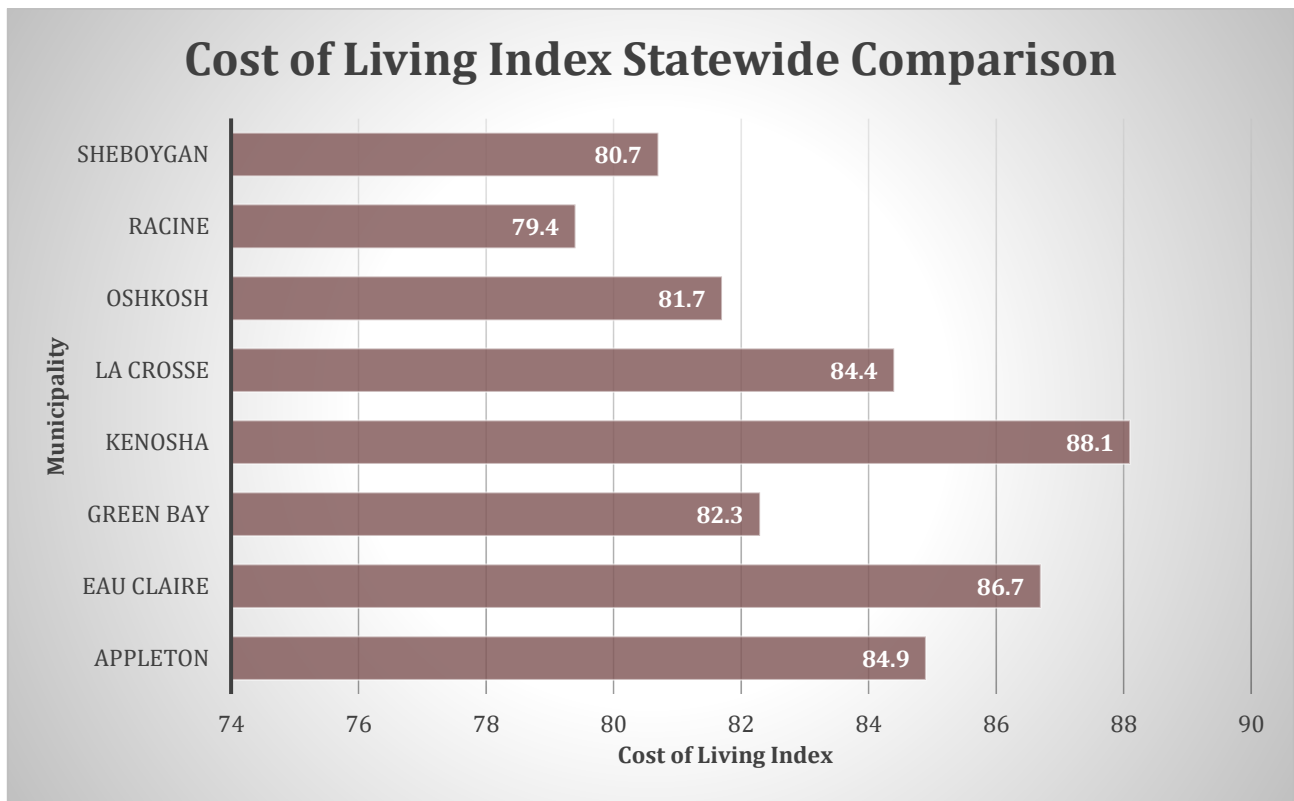
The following chart shows the average unemployment rate of the medium size cities in the State of Wisconsin. The City of Oshkosh saw the lowest average unemployment rate of 5.8% in 2020, while the City of Racine had the highest unemployment rate of 9.1%. The City of Appleton trended similarly to other communities in the state each month and was toward the middle of the pack with an average for the year of 6.1%. Leading economists indicate an unemployment rate of around 5% is considered “full employment”. The ongoing effects of COVID-19 on the labor market are unknown at this time.



Source: State of Wisconsin Department of Workforce Development

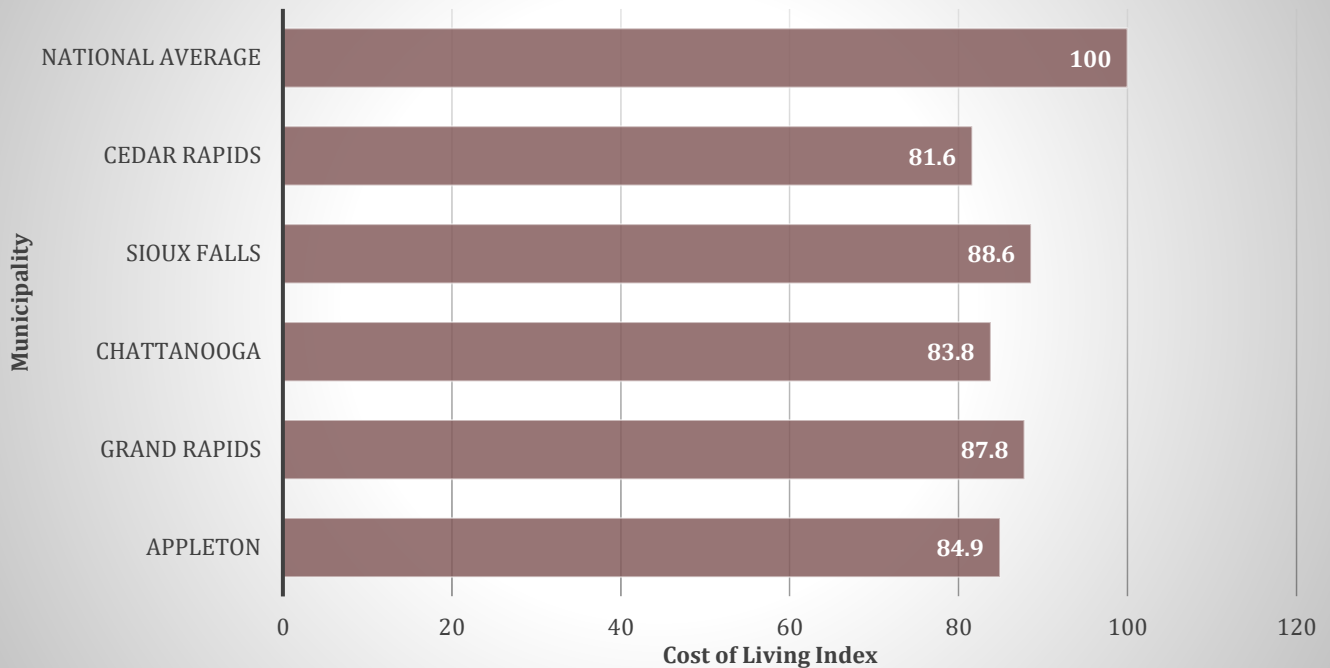
## COST OF LIVING

The cost of living index is a number used as the total of all living expense categories. The categories used to determine the index include housing, food and groceries, transportation, utilities, health care, and miscellaneous expenses such as clothing, services, and entertainment. The definition of these variables evaluated for each index is included below. The City of Appleton has a cost of living index of 84.9, which compares favorably to the national average of 100. Appleton's rating of 84.9 is near the middle when compared to other communities across the State and Midwest. Compared to the nearby communities of Green Bay and Oshkosh, Appleton's cost of housing and utilities was the highest, resulting in the higher cost of living overall among the three. The first chart below compares the City of Appleton to the other midsize cities in Wisconsin; the second chart, on the following page, compares Appleton to competitor cities throughout the United States.



Source: [www.bestplaces.net](http://www.bestplaces.net)

## Cost of Living Index National Comparison



Source: [www.bestplaces.net](http://www.bestplaces.net)

Categories used to calculate the cost of living index are listed below along with the City of Appleton's ranking out of 100 in parentheses( ):

**Food (94.):** The average cost of food and groceries, not including restaurants.

**Housing (67.4):** The average cost of an area's housing which includes mortgage payments, apartment rents, and property taxes.

**Utilities (97.9):** The average cost of heating and cooling a typical residence for the area, including electricity and natural gas.

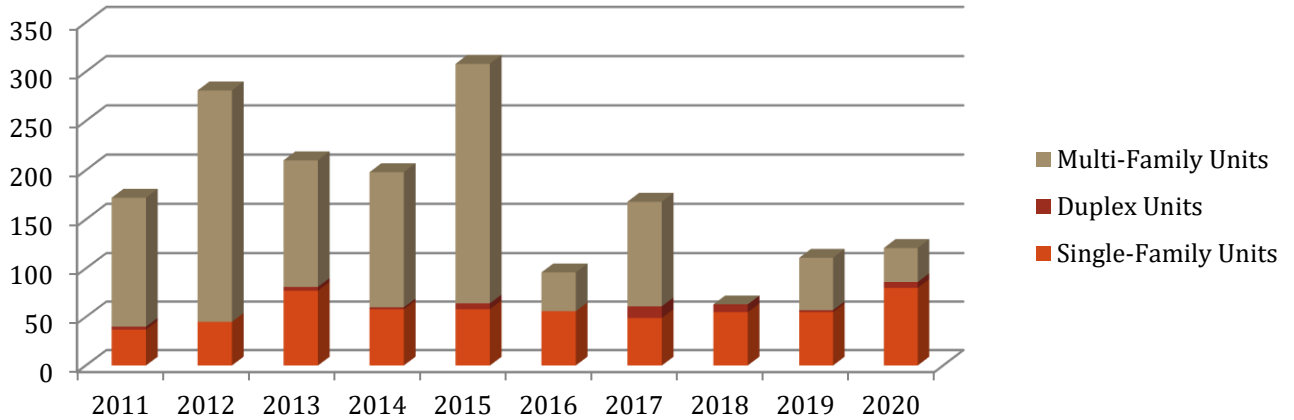
**Transportation (74.1):** The average cost of gasoline, car insurance, and maintenance expenses and mass transit expenses for the area. (Cost of the vehicle and vehicle registration and licensing taxes not included.)

**Health (103):** The average cost of health care calculated using the standard daily rate for a hospital room and the costs of a doctor's office visit and a dental checkup.

## BUILDING PERMIT ACTIVITY

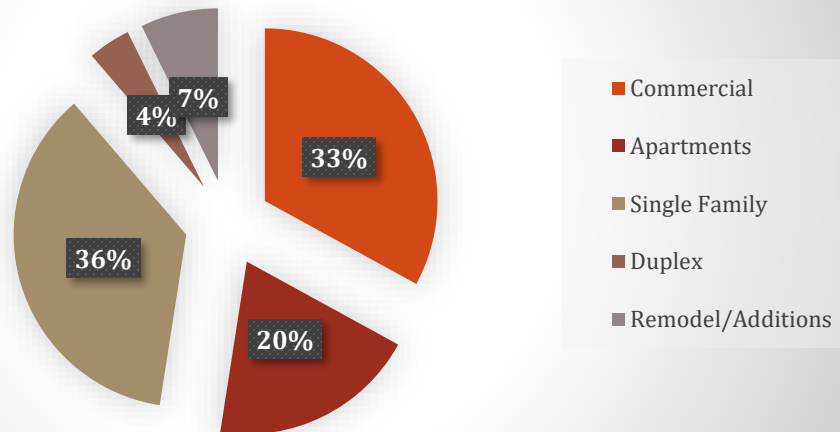
The number of single-family homes in the City of Appleton constructed in 2020 was 80, which is a significant increase to the 55 single-family residential permits in 2019. Total housing unit construction in Appleton increased in 2020 to 121 units from 111 units in 2019, with 35 multi-family and 6 duplex units making up the rest.

### Composition of New Housing Units - Appleton

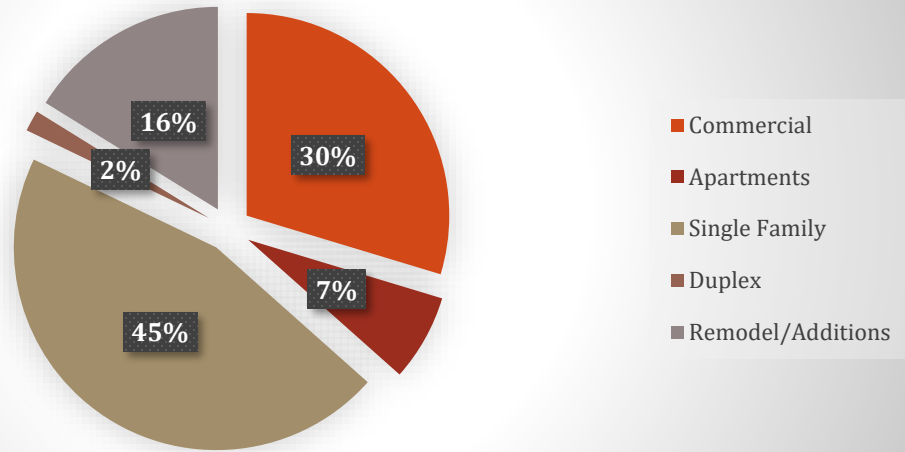


Construction by type for the City of Appleton exceeded construction by type for the overall Fox Cities by percentage in the single-family residential and remodeling categories. Commercial permits were a larger percentage in the Fox Cities overall in 2020 by a nominal amount (Appleton 30%, Fox Cities 33%).

### Construction Permit Value Breakdown - Fox Cities

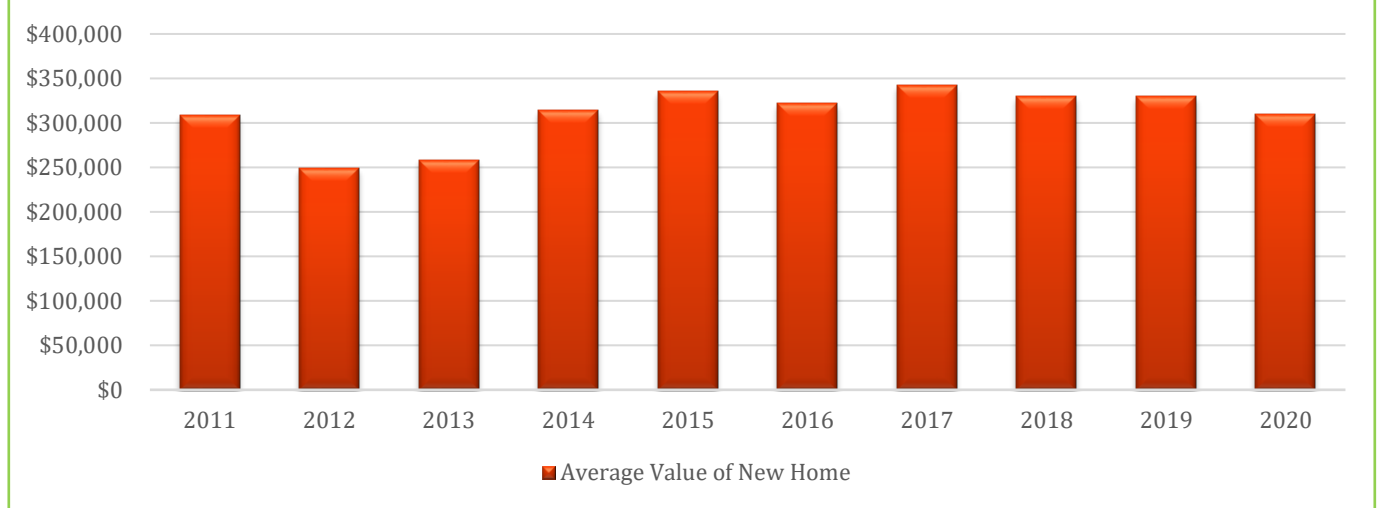


## Construction Permit Value Breakdown - Appleton



The total dollar value of single-family permits increased in 2020 to \$24,726,800 from \$18,152,000 in 2019 in the City of Appleton, with an average permit value of new home construction at \$309,085 in 2020 compared to \$330,036 in 2019.

## Average Value of New Homes 2020 - Appleton



To follow is a list of projects started in 2020 over \$1 million in estimated value based on permits. Projects over \$1 million provided for \$60,277,723 in construction value in 2020, with \$3,710,716 of that exempt from taxes.



## 2020 PERMITS IN APPLETON OVER \$1,000,000

Owner	Address	Estimated Cost (\$)	Reason	Description	Tax Exempt
320 EAST COLLEGE LLC	320 E COLLEGE AVE	10,531,000	NEW BUILDING	MULTI FAMILY/RETAIL	N
CRESCENT LOFTS-APPLETON LLC	306 W WASHINGTON ST	10,013,280	NEW BUILDING/REMODEL	MULTI FAMILY	N
F STREET APPLETON 1 LLC	3351 S EISENHOWER DR	8,633,800	NEW BUILDING	WAREHOUSE	N
BLOCK 800 LLC	823 W COLLEGE AVE	6,422,000	NEW BUILDING	COMMERCIAL	N
FOREMOST FARMS USA COOP	1815 W SPENCER ST	3,949,906	NEW BUILDING	BUSINESS	N
RICHMOND QUARTERBACK LLC	2702 N RICHMOND ST	2,505,500	NEW BUILDING	ALDI GROCERY STORE	N
RIVERHEATH LLC	121 S RIVERHEATH WAY	2,307,225	NEW BUILDING	EVENT SPACE	N
THRIVENT FINANCIAL	4321 N BALLARD RD	1,809,615	REMODELING	COMMERCIAL	N
ST. PETER LUTHERAN CHURCH	820 W COLLEGE AVE	1,738,000	REMODEL INT	CHURCH	Y
WALMART #01-2958 REAL ESTATE	3701 E CALUMET ST	1,699,315	REMODEL INT	SHOPPING CENTER	N
ST. THERESE CONGREGATION	213 E WISCONSIN AVE	1,387,000	ADDITION	CHURCH	Y
BRIARCLIFF PROPERTIES LLC	601 N BRIARCLIFF DR	1,364,274	REMODEL INT	MULTI FAMILY	N
CITY OF APPLETON	2006 E NEWBERRY ST	1,277,120	LAT RPLCMT	WASTEWATER TREATMENT PLANT	Y
ENTERPRISE 2007 LLC	2501 E ENTERPRISE AVE	1,196,103	REMODEL INT	GRANT THORNTON	N
THEDACARE INC	2500 E CAPITOL DR	1,190,720	NEW BUILDING	THEDACARE OSP	N
ALBERTFEST HOLDINGS LLC	1200 W NORTHLAND AVE	1,107,800	ADDITION	FESTIVAL FOODS GROCERY STORE	N
THEDACARE INC	1818 N MEADE ST	1,066,044	REMODEL INT	REGIONAL MED CNTR APPLETON	N
LAWRENCE UNIVERSITY	611 E COLLEGE AVE	1,046,596	REMODELING	PRIVATE UNIVERSITY	Y
AJC REVOC TRUST	7476 N PURDY PW	1,032,425	NEW BUILDING		N

## EQUALIZED VALUE AND NET NEW CONSTRUCTION

### **EQUALIZED VALUE:**

The equalized value is the estimated value of all taxable real and personal property in each taxation district, by class of property, as of January 1 and certified by DOR on August 15 of each year (Definition: Wisconsin Dept. of Revenue). Being the largest number of the two measurements (\$6.2B in 2020 vs. \$5.86B in 2019), it is also the least volatile. Equalized values capture the following changes:

- DOR's market field studies
- Demolition or destruction of buildings or other improvements
- Changes in property's exempt status
- Changes in classification of property
- Annexation gains or losses
- Other miscellaneous changes
- Adjustments (corrections) made under State law (Sec. 70.57, Wis. Stats.)

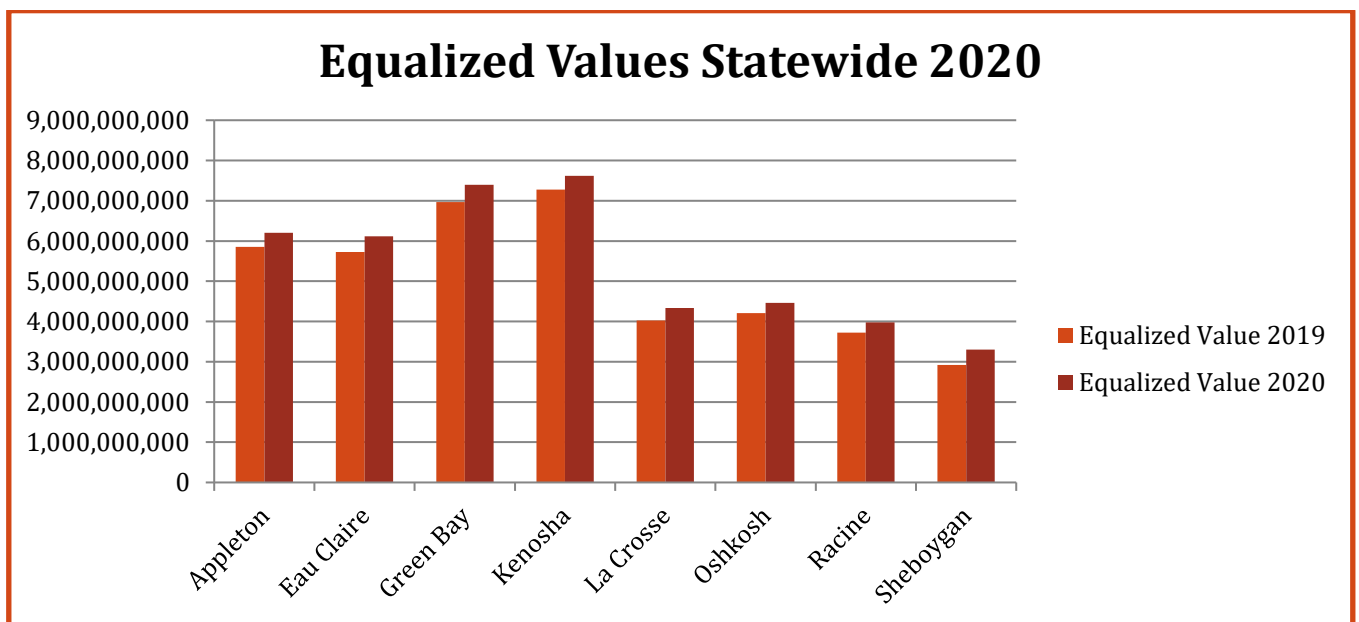
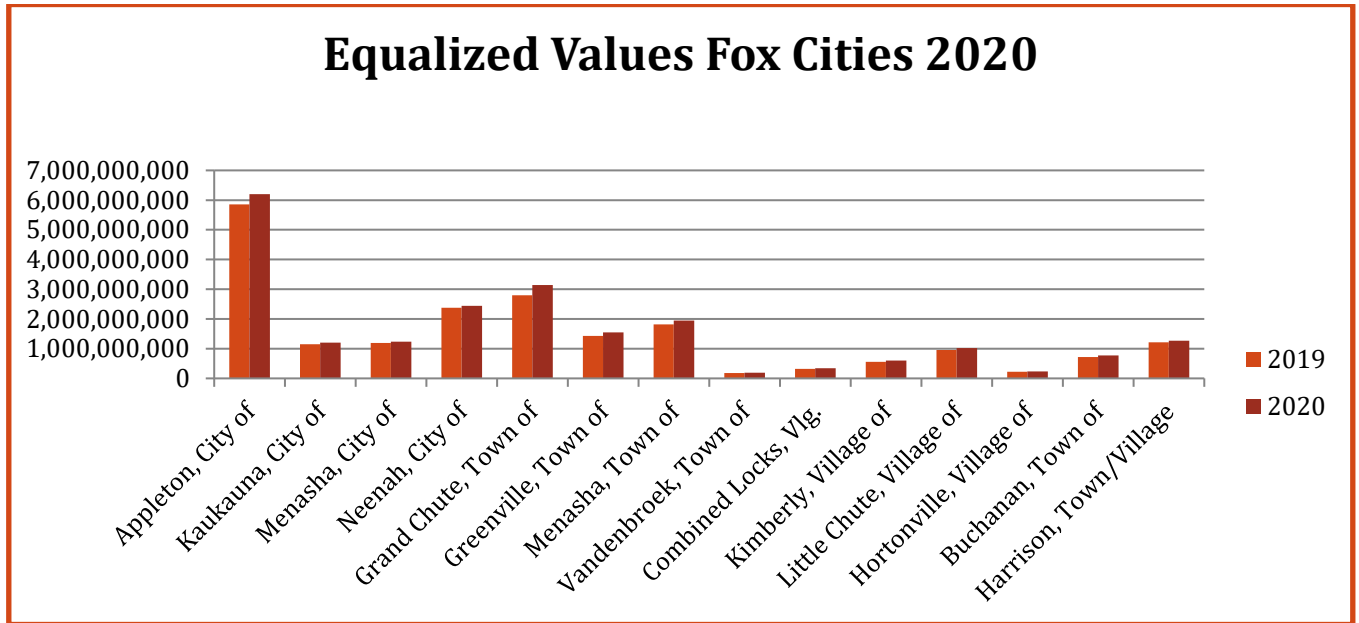
### **NET NEW CONSTRUCTION:**

Net new construction captures the following:

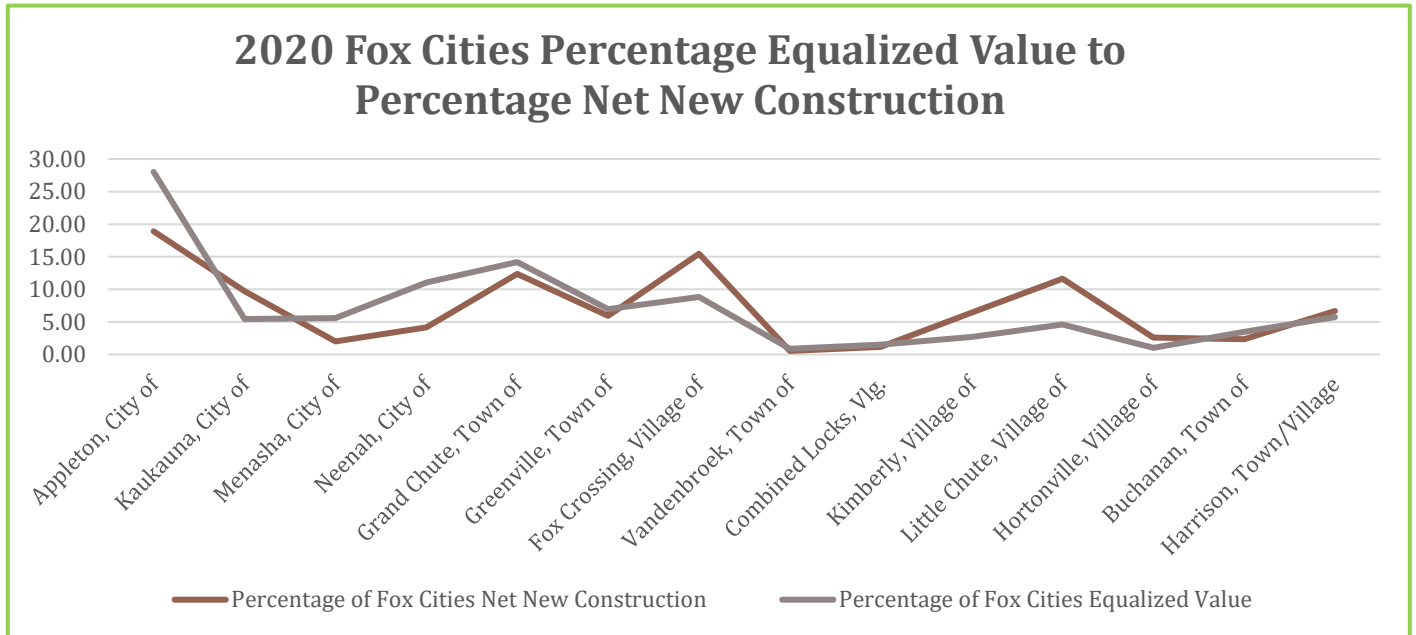
- Land value changes are due to higher land utility
- Improvement value changes are due to construction of new buildings

This is a significant number to pay attention to because it ties directly to the City's available tax levy. A municipality is allowed to increase its levy over the amount it levied in the prior year by the percentage increase in equalized value from net new construction. If no new construction occurred in your community, then your allowable levy increase is zero percent.

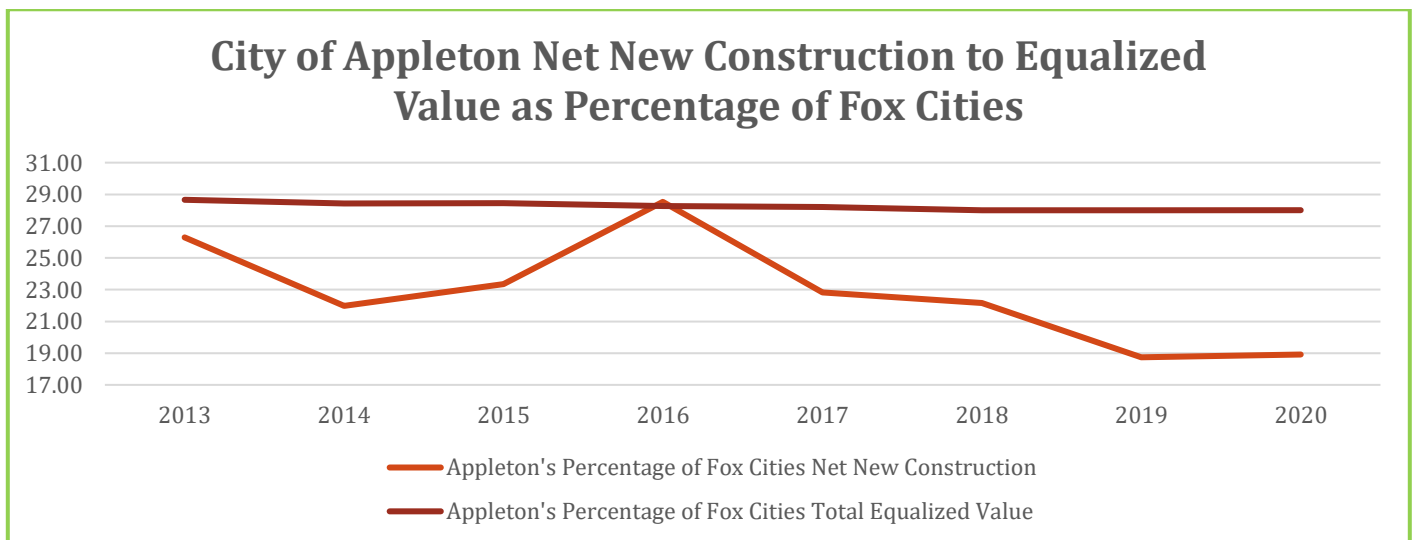
Appleton experienced an increase in equalized values for the City overall of 6.00%, compared to a statewide increase in Wisconsin of 5.55%. The following charts compare Appleton's equalized value to the Fox Cities and other midsize cities in the State of Wisconsin.



The following chart shows the percentage of net new construction captured by each municipality (as a percentage of the Fox Cities) and their equalized value (as a percentage of the Fox Cities). The City of Appleton garnered a lower percentage of net new construction in the Fox Cities relative to the percentage of equalized value in the Fox Cities. Kaukauna, Fox Crossing, Kimberly, Little Chute, Hortonville, and Harrison outperformed their percentage of the Fox Cities with net new construction in 2020. Municipalities use the percentage increase of net new construction as a valuation factor in determining the allowable tax levy for the municipality.



The 8-year trend shown in the following chart which compares the City of Appleton’s percentage of Fox Cities net new construction and the percentage of total equalized value in the City of Appleton is concerning. 2016 was the only year in which the City’s net new construction percentage exceeded the City’s percentage of equalized value. With an average net new construction percentage 5.41% below the equalized value percentage over the 8-year period, the City of Appleton’s percentage of total Fox Cities’ equalized value has been decreasing.



## Fox Cities by Percentage Increase in Net New Construction

Municipality	2019 Equalized Value	Net New Construction	2019-2020 Percentage Increase	Percentage of Fox Cities Net New Construction
Little Chute, Village of	952,165,700	41,561,100	4.36%	11.61%
Hortonville, Village of	218,681,900	9,243,700	4.23%	2.58%
Kimberly, Village of	561,813,100	23,045,000	4.10%	6.44%
Fox Crossing, Village of	1,820,357,800	55,290,300	3.04%	15.45%
Kaukauna, City of	1,153,793,700	34,849,600	3.02%	9.74%
Harrison, Town/Village	1,213,180,500	23,883,700	1.97%	6.67%
Outagamie County*	16,570,536,900	297,020,100	1.79%	N/A
Grand Chute, Town of	2,800,738,600	44,335,500	1.58%	12.39%
Greenville, Town of	1,434,434,600	21,233,600	1.48%	5.93%
Winnebago County*	14,203,069,600	206,597,000	1.45%	N/A
Calumet County*	4,490,140,000	64,315,900	1.43%	N/A
Combined Locks, Vlg.	321,121,600	4,194,700	1.31%	1.17%
Buchanan, Town of	723,121,600	8,472,300	1.17%	2.37%
<b>Appleton, City of</b>	<b>5,855,356,700</b>	<b>67,675,500</b>	<b>1.16%</b>	<b>18.91%</b>
Vandenbroek, Town of	182,974,900	1,980,100	1.08%	0.55%
Neenah, City of	2,374,159,900	14,958,100	0.63%	4.18%
Menasha, City of	1,196,723,000	7,241,300	0.61%	2.02%
<b>Fox Cities Total</b>	<b>\$20,808,623,600</b>	<b>\$357,964,500</b>	<b>1.72%</b>	<b>100%</b>

\*County numbers included for net new construction comparison only, not included in totals

The City of Appleton represents 28.01% of the Fox Cities by total equalized value and captured 18.91% of net new construction equalized value in 2020. The City's net new construction percentage increase is 1.16%, compared to the Fox Cities average of 1.72%, which warrants monitoring to ensure the City of Appleton captures its "fair share" of net new construction. Details of net new construction throughout the State can be found on the State of Wisconsin Department of Revenue Website:

<https://www.revenue.wi.gov/SLFReportsassessor/nnc-2020f.pdf>

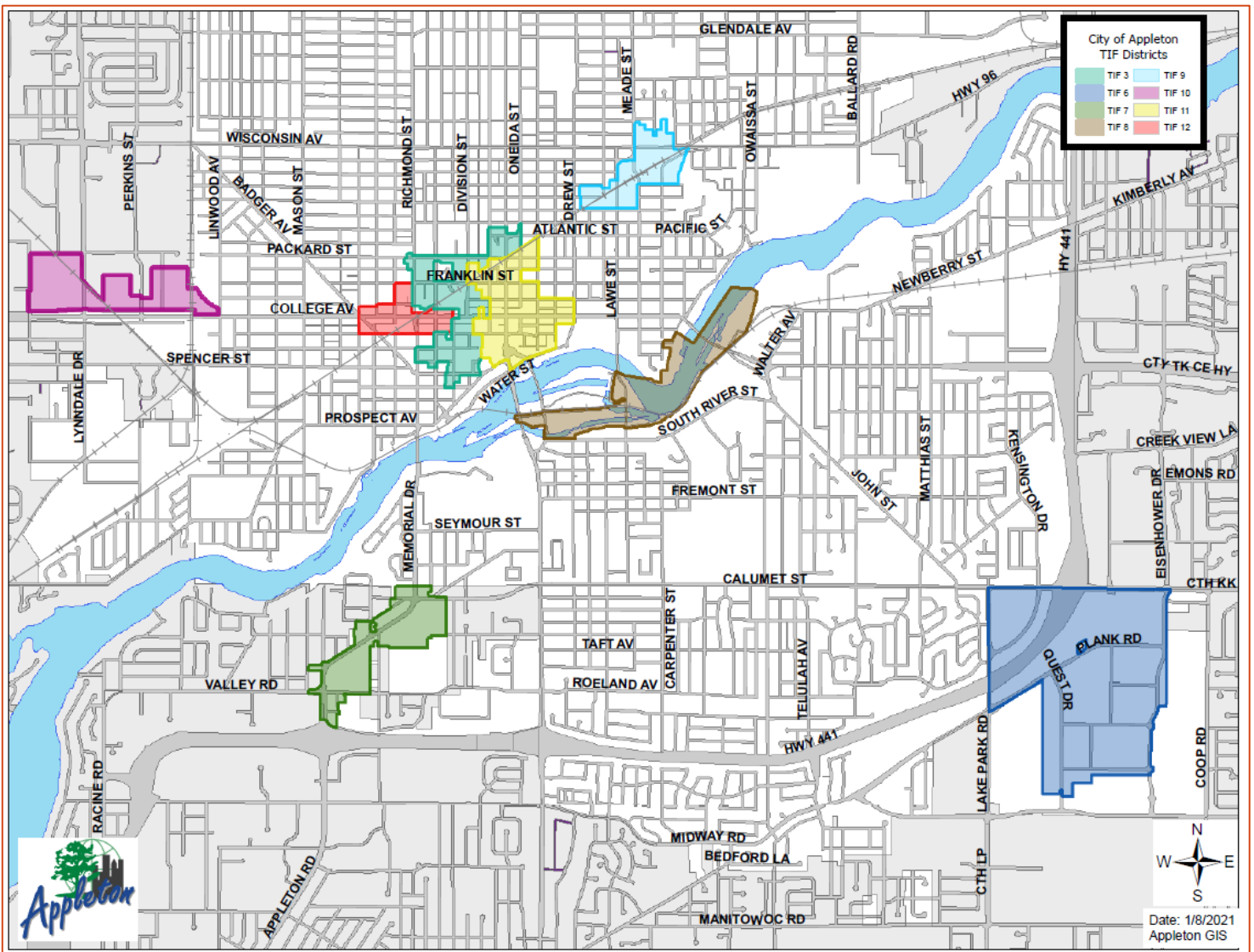
## TAX INCREMENTAL DISTRICT

The following table shows the value increase/decrease of Tax Incremental Districts since creation, change during the past year, and an average annualized percentage change. All Tax Incremental Districts in the City saw an increase in increment in 2020. Citywide, the cumulative increase across all Tax Increment Districts in 2020 was 20.67%. The following pages summarize performance by each district. All districts saw a 6.5% increase in value in 2020 due to adjustments to the assessment ratio by the Wisconsin Department of Revenue.

<b><i>Tax Incremental District Valuations</i></b>									
<b>TID #</b>	<b>Start</b>	<b>Base Value</b>	<b>2019 Value</b>	<b>2020 Value</b>	<b>Total Increment</b>	<b>2019-2020 Increment</b>	<b>% Change in 2019-2020 Value</b>	<b>Avg % Annual Change Since Start</b>	<b>% Change in Total Value Since Start</b>
TID 3	1993	18,940,800	70,899,500	77,660,500	58,719,700	6,761,000	9.54%	12.4%	310.02%
TID 6	2000	12,141,600	129,019,600	165,211,300	153,069,700	36,191,700	28.05%	70.04%	1260.7%
TID 7	2007	25,657,000	39,089,800	42,924,700	17,267,700	3,834,900	9.81%	6.12%	67.3%
TID 8	2009	6,135,100	56,920,500	78,139,900	72,004,800	21,219,400	37.28%	130.41%	1173.65%
TID 9	2013	21,512,900	20,537,900	21,978,700	465,800	1,440,800	7.02%	0.43%	2.17%
TID 10	2013	24,543,900	18,183,800	21,162,300	(3,381,600)	2,978,500	16.38%	-2.76%	-13.78%
TID 11	2017	83,099,200	84,702,900	101,405,100	18,305,900	16,702,200	19.72%	22.03%	22.03%
TID 12	2017	22,974,900	24,144,800	26,685,600	3,710,700	2,540,800	10.52%	16.15%	16.15%
<b>Total</b>		\$215,005,400	\$443,498,800	\$535,168,100	\$320,162,700	\$91,669,300	20.67%		148.91%

\*Note: TID #6 & TID #8 Base Value adjusted to include amended area that was added to the district.

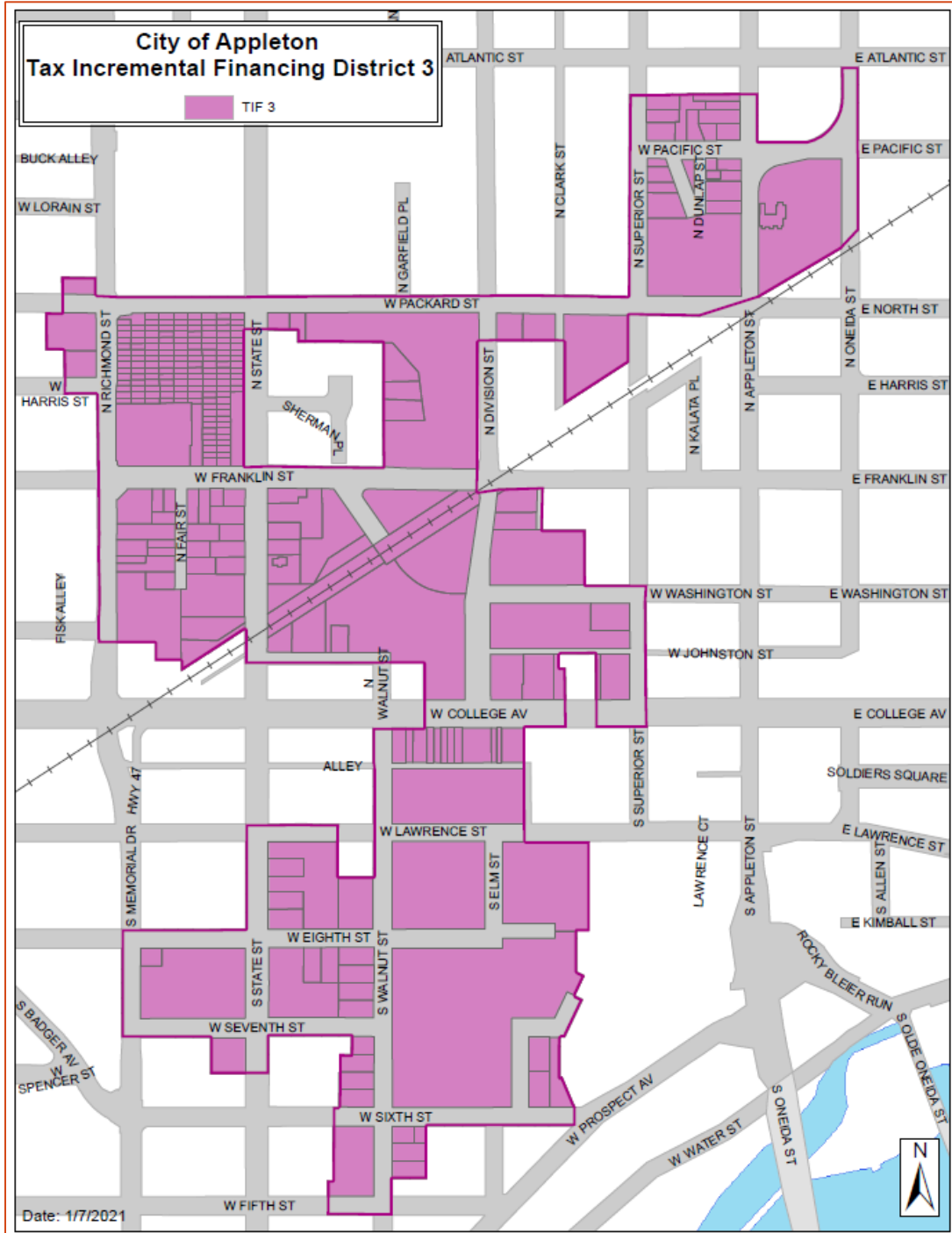
The following is a City Map indicating locations of the TIDs and then a map of, and performance notes for each, along with the scheduled closing date of each TID:



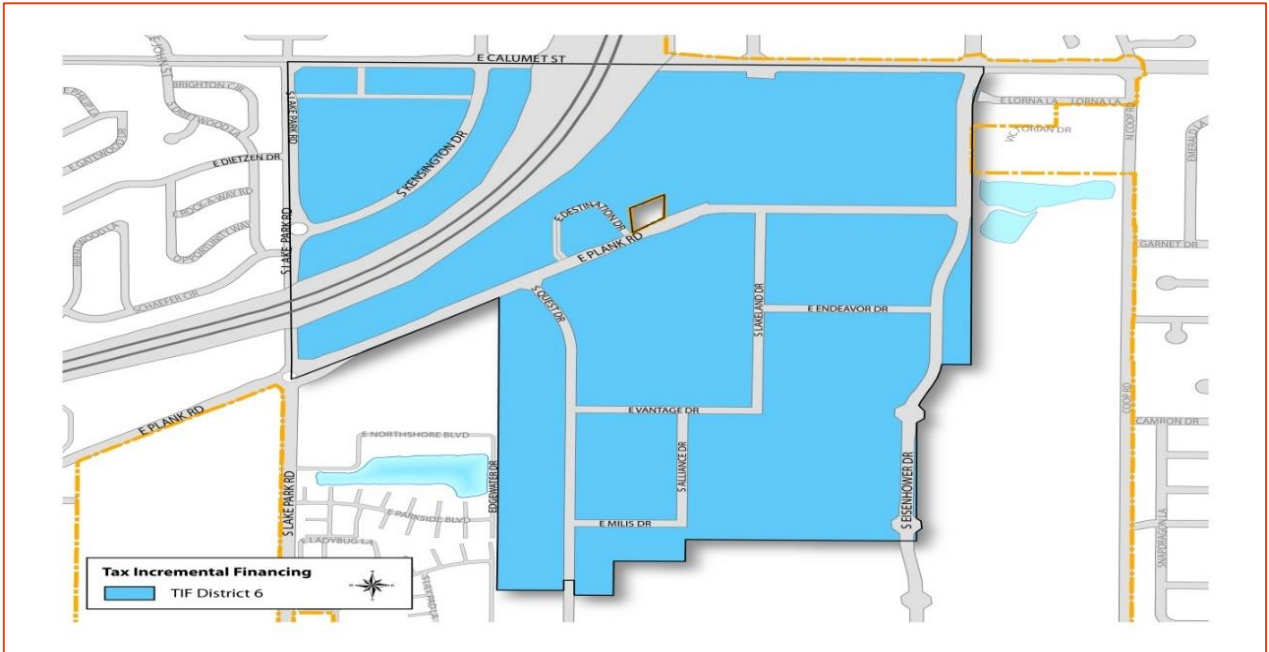


# TAX INCREMENTAL DISTRICT PERFORMANCE

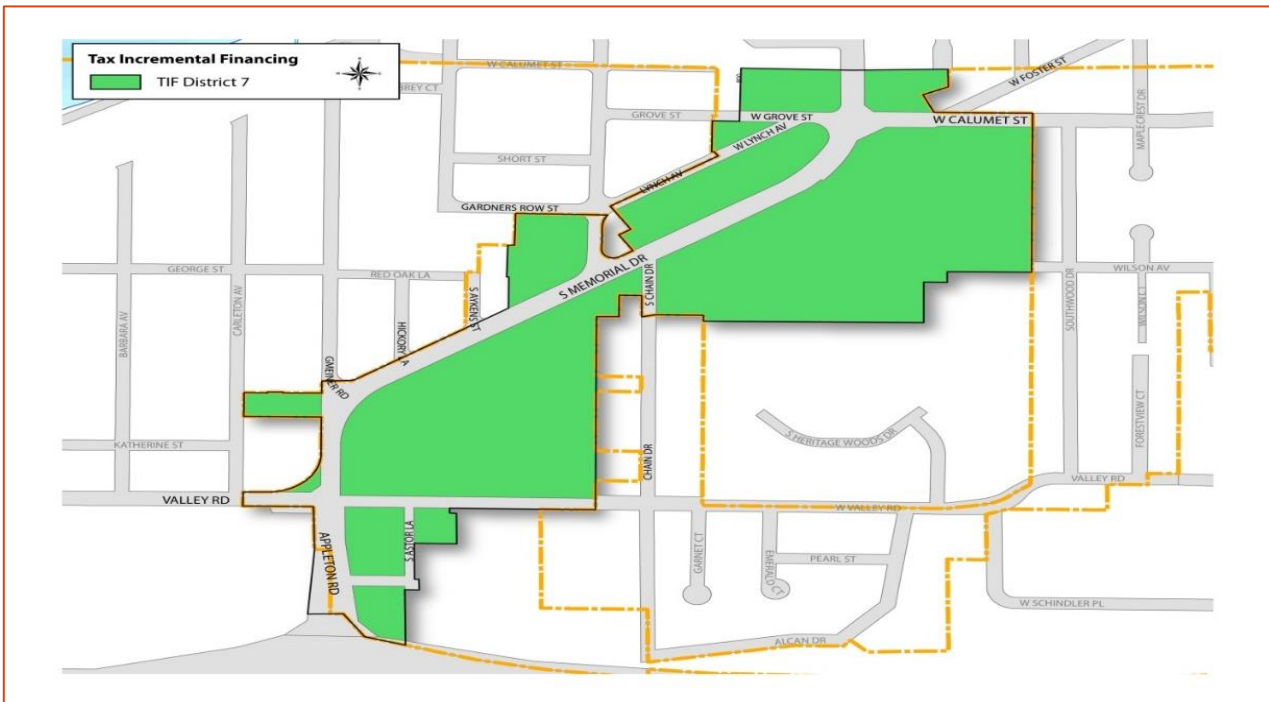
**TID #3** Equalized valuations in TID #3 increased by \$6,761,000 or 9.54%. Most of this is due to the OuterEdge Stage returning to the tax rolls, ratio change, and DOR adjustment to last year's values. This TID was declared distressed in 2011 and is scheduled to close by 2029. The boundaries reflected on this map incorporate an amendment made to the District in 2020; however, the valuations chart reflects values as reported by WI DOR prior to the amendment.



**TID #6** Equalized valuations increased in TID #6 by \$36,191,700 or 28.05%. Increases in locally assessed value due to the Veritiv warehouse and Custom Offsets new office contributed to this change. The remainder is due to DOR adjustment to last year's values. This TID is scheduled to close in 2023.

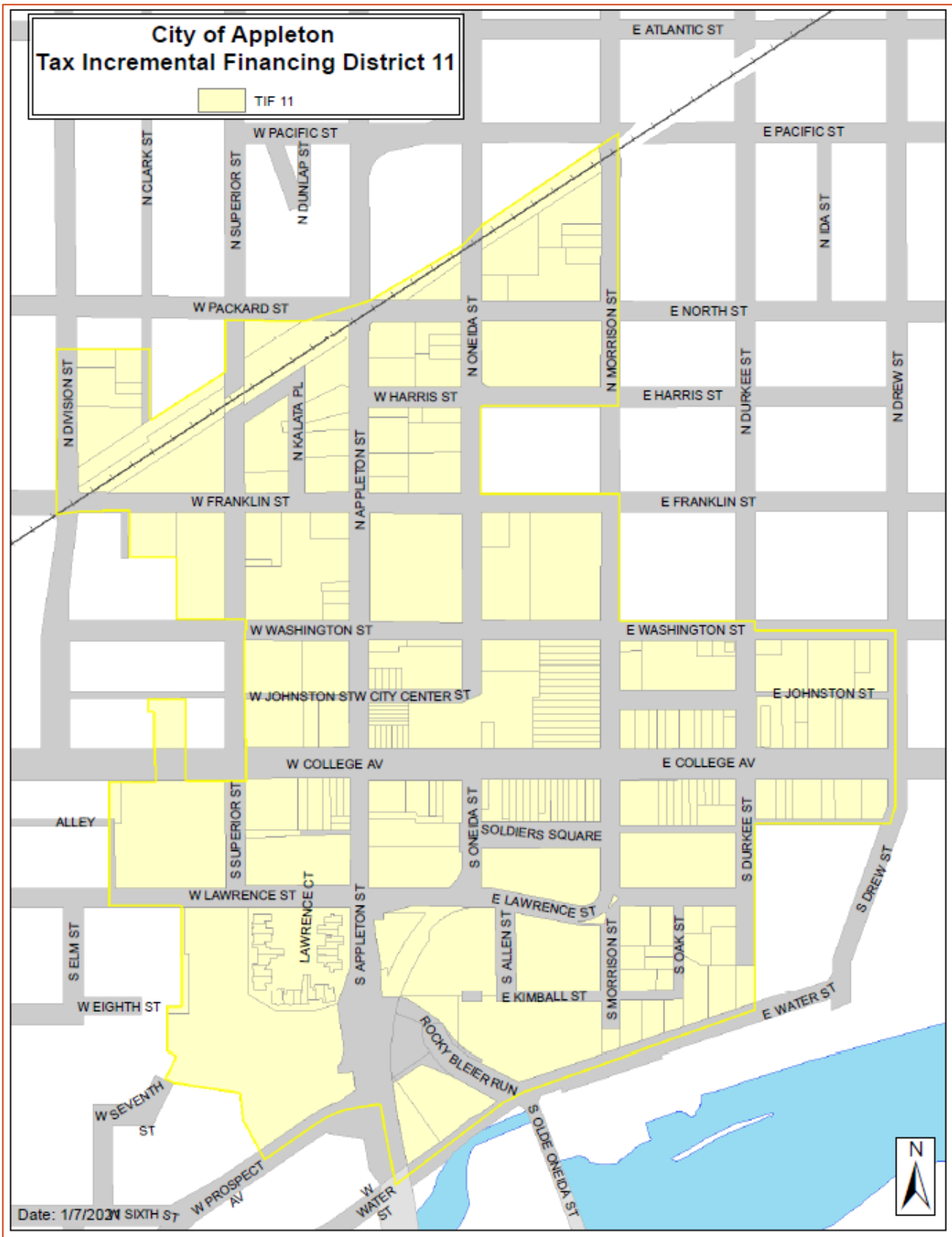


**TID #7** TID #7 saw an increase in equalized valuation of \$3,834,900, which is 9.81%. Most of this is due to the ratio change and DOR adjustment to last year's values. Fleet Farm also took ownership of the previously vacant Secura Insurance building in 2020. This TID is scheduled to close in 2024.

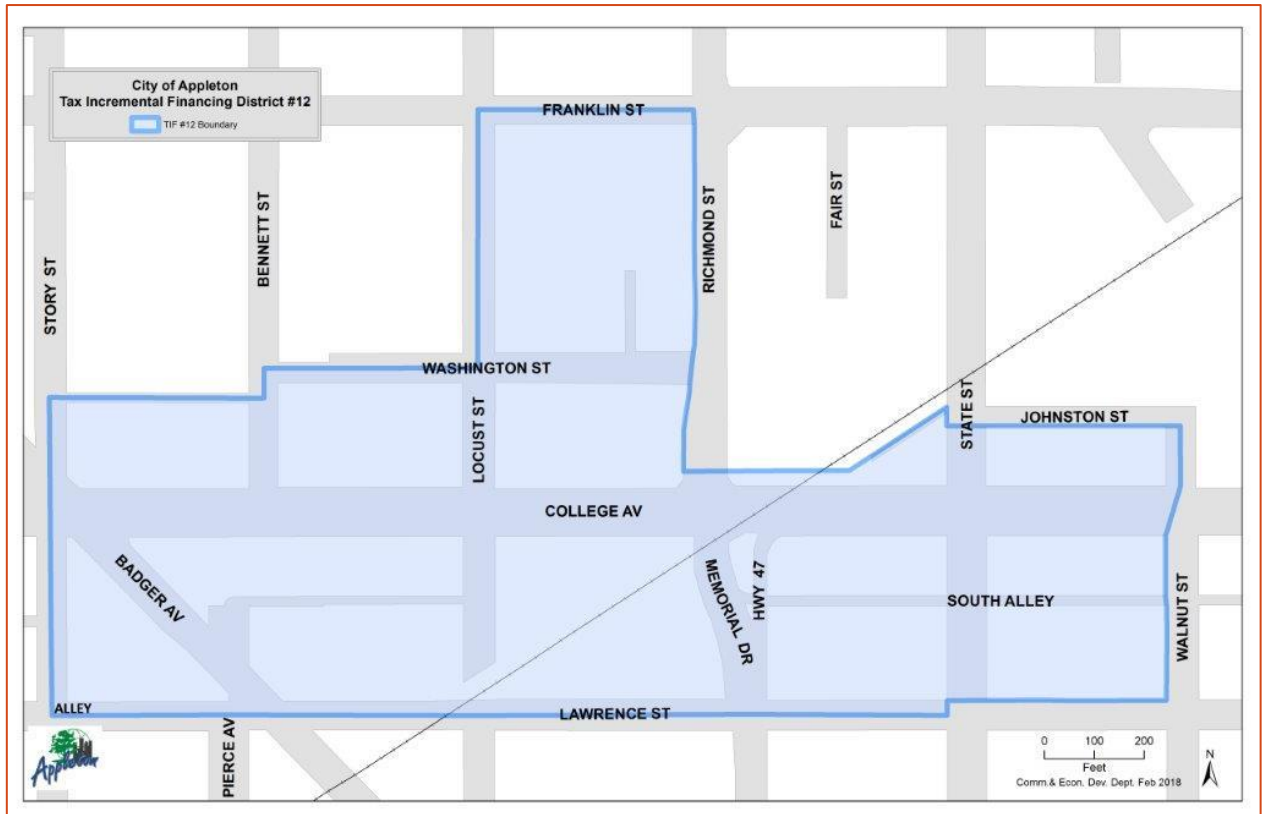








**TID #12** TID #12, also created in 2017, saw an increase in value of \$2,540,800 or 10.52%. Most of this is due to the ratio change and DOR adjustment to last year's values. This TID is scheduled to close in 2044.



## BUSINESS DEVELOPMENT

The City once again experienced a net gain in new businesses. During 2020, 91 businesses opened or relocated in the City, while 77 closed or relocated, for a net gain of 14. The following pages highlight the businesses that opened in Appleton and the businesses that closed or moved or moved out of the City in 2020.

## Businesses That Opened or Relocated in the City of Appleton:

THERAPEUTIC PULSE C/O SHARON A BLAKE	JWM MODERN EQUIPMENT COMPANY LLC	AMERICAN ENVIRONMENTAL GROUP LTD
ANNEX WEALTH MANAGEMENT LLC	CECKA'S BARBER/SALON LLC	COMPASS SALES & MARKETING INC
COTTINGHAM & BUTLER INS SERVICES INC	EVER DRY WATERPROOFING OF THE FOX CITIES	FIRST IMPRESSIONS SC
FOX VALLEY CLEAN AIR C/O DANIEL BECK	HANDS-ON HEALING MASSAGE LLC	JIMMY JOHNS : J-BALLARD INC
LEGACY INVESTMENTS SERVICES INC	MOON WATER CAFE LLC	NICOLET STAFFING : STAFFWORKS GROUP-WI
PAUL DAVIS RESTORATION OF SE WI INC	POWER ENGINEERS INC	PREVEA HEALTH : ST VINCENT HOSPITAL
STERLING LAW OFFICES SC	TRICIA GONZALEZ COUNSELING SERVICES LLC	WONDERS ICE CREAM C/O GAOLAI LEE & HONG KONG VANG
AIA CORPORATION	CARDINAL REALTY LLC	CASTING ON LLC
COMPASS TWO LLC	FITZGERALD LAW FIRM LLC	IVORY ROSE BRIDAL BOUTIQUE LLC
THRIVENT FINANCIAL FOR LUTHERANS	ABC STAFFING LLC	BEHNKE PROPERTIES LLC
FRESS RESTAURANT & BAR : DVV ENTERPRISES LLC	HEALTHY FIRST THERAPEUTIC MASSAGE	JERK JOINT LLC
NINE.TWO.ZERO SALON LLC	FOX RIVER LAW LLC	MONEY STORE THE : MLD MTG INC - THE CAMBRIDGE TEAM C/O CHRIS HALBACH
EAR NOSE & THROAT SPECIALISTS OF WI SC	EMILY MEGAN PHOTOGRAPHY	FLY CIRCUS & AERIAL ARTS C/O JAIME SCHMITT
FORK FARMS LLC	GIORDANA BEAUTY LLC	THE HOME TEAM - CENTURY 21 ACE REALTY C/O A LAUER & C VOSTERS
J B HUNT TRANSPORT SERVICES INC	LIFE COUNSELING & CONSULTING LLC	M C KINNEY PHOTOGRAPHY : TRACY L VAN ZEELAND PHOTOGRAPHY INC
THE MANOR @ 1815 : WE LIVE MINDFULLY LLC	STEAM SALON AND SPA : STEAM LLC	TOPVU MEDIA LLC
UPLIFT NUTRITION LLC	VALERIE HAMILTON PSYCHOTHERAPIST LLC	BRAIDS UNLIMITED SALON/BARBER SHOP C/O JOHNNITTA SCOTT
CORE'S LOUNGE LLC	FOX CITIES CLINIC OF CHIROPRACTIC LLC	IQ RESOURCE GROUP INC
KIGER STEFFES CHIROPRACTIC SC	PHYSICS OF FITNESS LLC	A+ CUTS LLC
RITCHIE AUTO LLC	SEAN & SONS LLC	STUDIO K STAINED GLASS LLC



WILTZIUS ASSOCIATES LLC	BENDEL IP LEGAL LLC	COUNSELING AND CONSULTING PROFESSIONALS LLC
EASTMAN, EMILY	HARMONIA REIKI HEALING C/O ANN E WENDEL	HOMES FOR INDEPENDENT LIVING OF WI LLC ( FOX VALLEY)
KKY POOL HALL C/O YER XIONG & KEETEEKUNE THAO	LAURA DEMETRICIAN - LICENSED MARRIAGE & FAMILY THERAPIST	MANDY MC LAUGHLIN
MASTER'S TOUCH DENTAL CERAMICS LLC	MEADE STREET BISTRO C/O SONY MEYER	NEIL NOVAK REALTY LLC
NORTHLAND HOMETOWN PHARMACY LLC	PURPLE LOTUS COUNSELING LLC	RESTORATIVE THERAPEUTICS MASSAGE & WELLNESS LLC
YOUR CBD STORE : NATURES NECTAR LLC	ELF'S GIFTS LLC	POPEYES LOUISIANA KITCHEN : SMIT CO EATERIES INC
CULTIVAS BIO INC	THOUGHTFUL THERAPY LLC	CHRISTIANOS PIZZA : WISE RESTAURANT GROUP
EDWARD D JONES & CO LP #93680	FARRELL EQUIPMENT & SUPPLY CO INC	FOX VALLEY VITALITY LLC
MAPLE TREE REST & PANCAKE HOUSE C/O AGRON & SPRESA BEKTESHI	PURE BARRE C/O JORDAN MALKOWSKI & BROOKE MC MILLAN	SCHOLL'S WELLNESS CO LLC
SHOPKO OPTICAL #4028 : SHOPTIKAL LLC	WORLD FINANCE CORP OF WISCONSIN LLC	THREE OTTERS PHOTOGRAPHY % MARY BAIRD
V'S SKIN STUDIO LLC	VALLEY PILATES LLC	

**Businesses That Closed, Relocated in the City, or Moved Out of the City of Appleton:**

POST CRESCENT : GANNETT SATEL INFO NTRK INC	COEX LLC	AZCO INC
MARKET PLACE LLC THE	CASSIE'S FAMILY CHILD CARE C/O CASSIE PASHOLK	DONALDSON'S ONE HOUR CLEANERS INC
EVENT PRODUCTION SYSTEMS : ONSTAGE AUDIO LLC	FAMILY THERAPY & ANXIETY CTR C/O KURT L MAHNKE	AL'S AUTO REPAIR C/O ALAN J VANEVENHOVEN
RAPID 3D INC	ROOTED YOGA LLC	VISTA FINANCIAL STRATEGIES LLC
WOMEN : ASARE ENTERPRISES LLC	CHARLES THE FLORIST OF APPLETON LLC	MIKE'S POPCORN C/O MICHAEL J COURTNEY
EMPOWER YOGA LLC	FRANK W LADKY ASSOCIATES INC	GREAT LAKES REALTY ADVISORS LLC
HOMEFREE USA LLC	ITEMS OF INTEREST C/O ANGELA & JOEY D'AMICO	RUSSELL SPROUTS LLC
VON BRIESEN & ROPER SC	NORTHWIND IP LAW SC	FRESH EXPRESSIONS LLC

TEKBOLT C/O BRIAN GILL	NATION-WIDE TRAVELERS TRAVEL CLUB INC	NATIONWIDE TRAVELERS TOURS INC
LESSONS BY LAURA C/O LAURA E ROTHE	APPLETON MAP COMPANY C/O TIM GUNTHER	COMMUNITY FIRST CREDIT UNION
COST CUTTERS #62439 : MINNESOTA REGIS CORP	HEART-CENTERED HEALING & HOLISTICS LLC	LITTLE ANGELS PLACE C/O ARLENE DANQUE
SILICON INVESTIGATIONS LTD & CARBON INVESTIGATIONS	SITAWI LIFE COACHING LLC	STONE ARCH AT RIVERVIEW GARDENS LLC
ART SPARK LLC THE	ASSOCIATED APPRAISAL CONSULTANTS INC	MARCO'S PIZZA : HOOGLAND FOODS LLC
ANGEL KEEPERS ACADEMY LLC	CBD & WELLNESS C/O ANDREW & JULIE THORNELL	DESIGNERS WORKPLACE LLC
FARMERS INSURANCE GROUP : GRAFF INSURANCE AGENCY LLC	JAVA WARUNG LLC	KP JEWELERS LLC
STATE FARM INSURANCE AGENCY C/O NICK C LOR	NUTRITIONAL HEALING LLC	APPLETON-NEENAH-MENASHA TAXI CO : PEOPLE MOVERS INC
ROMENESKO, VERNON REALTY C/O VERNON ROMENESKO	SOLANGE'S AFRICAN MARKET C/O AUGUSTIN UWERA	BEYOND WORDS LLC
BOOST MOBILE : LA WIRELESS LLC	CHERRY CREEK MORTGAGE COMPANY	CIRCLE STREET SEWN STATIONERY C/O LINDY JANE ADAMS
COST CUTTERS #62440 : MINNESOTA REGIS CORP	HARMONY PIZZA LLC	INSURANCE BROKERAGE SERVICES : IBS INC
INSPIRE FAMILY CHIROPRACTIC C/O DR ABBIE GOODMAN	KEEP COOL THERMOGRAPHY APPLETON LLC	LEGAL BUSINESS EDGE LLC
MOVICA SALON LLC	NU WAVE COUNSELING LLC	PHO HOUSE LLC
SCHOOLHOUSE HOMEWORKS C/O STEVE G SCHOOL	APPLETON CRANKSHAFT SERVICE INC	OFFICE DEPOT INC #142
PROFESSIONAL POLISH SHOP : REGETH DETAIL CENTER INC	FOX VALLEY CAT CLINIC LLC	HORACE MANN INSURANCE C/O JEMING VANG
BEST BUY STORES LP (APPLETON EAST 001047)	DYNASTY LIMOUSINE SERVICE LLC	FOX VALLEY TINT WRAPS & CERAMIC PRO : FOX VALLEY TINT LLC
OFFICE MAX NORTH AMERICA #6751	QUIZNO'S SUBS : NIENHAUS COMPANIES LLC	R & L AUTO REPAIR C/O RICHARD J THURBER JR
SALON AURA LLC	ATHENA BEAUTY LLC	VSAY DESIGNS C/O VISETH MOUA

## HOUSING & NEIGHBORHOOD SERVICES

### HOMEOWNER REHABILITATION PROJECTS

The Homeowner Rehabilitation Loan Program provides financial and related technical assistance for low- to moderate-income homeowners in the City of Appleton for the rehabilitation of their property. In order to qualify, the property must be owner occupied as well as meet income, equity and asset requirements.

Financial assistance is provided in the form of a 0% interest, deferred payment loan. The City places a lien on the property for the amount being spent on the rehabilitation, and the owner pays the loan back when the property is sold or vacated. This allows the City to assist property owners with maintaining and/or increasing their property values. When loans are repaid, the City reallocates those funds to future rehabilitation projects.

Priority is given to the following improvements: Lead-based paint hazards, roofing, foundation, electrical, plumbing, heating, windows, doors, insulation, interior walls/ceilings, private sidewalk, driveway, porches, siding, exterior trim, etc. The City does not provide funding for purchasing properties, additions to properties, cosmetic and/or luxury items.

The purpose of the program is two-fold: (1) to ensure decent, safe, and sanitary housing for low- to moderate-income residents of the City of Appleton, and (2) to maintain the housing stock of these homes before they get to the point of being beyond repair. This stabilizes neighborhoods, maintains property values, and, ultimately, increases the tax base in the City.

The Program has five main objectives that directly benefit the City of Appleton:

1. Help low- to moderate-income residents of the City of Appleton maintain decent, safe, and sanitary housing
2. Reduce the risk of lead poisoning from the older housing stock
3. Stabilize neighborhoods
4. Increase the tax base for the City
5. Create jobs in the community by hiring local contractors

The Program is considered to be very successful in achieving these objectives. Since 1979, the Homeowner Rehabilitation Loan Program has rehabbed nearly 1,200 homes in the City of Appleton and generated over \$6.3 million in outstanding loans. The City rehabilitated 16 housing units in 2020 and spent nearly \$400,000 on home improvement loans. Extra precautions taken to keep staff, homeowners, and contractors safe during the COVID-19 pandemic led to a reduction in projects completed. Only exterior repairs and interior repairs that were necessary for the health and safety of the residents were completed. Occupants were relocated while interior work was done on the home. The goal for 2021 is to spend \$360,000 rehabilitating an additional 24 housing units.

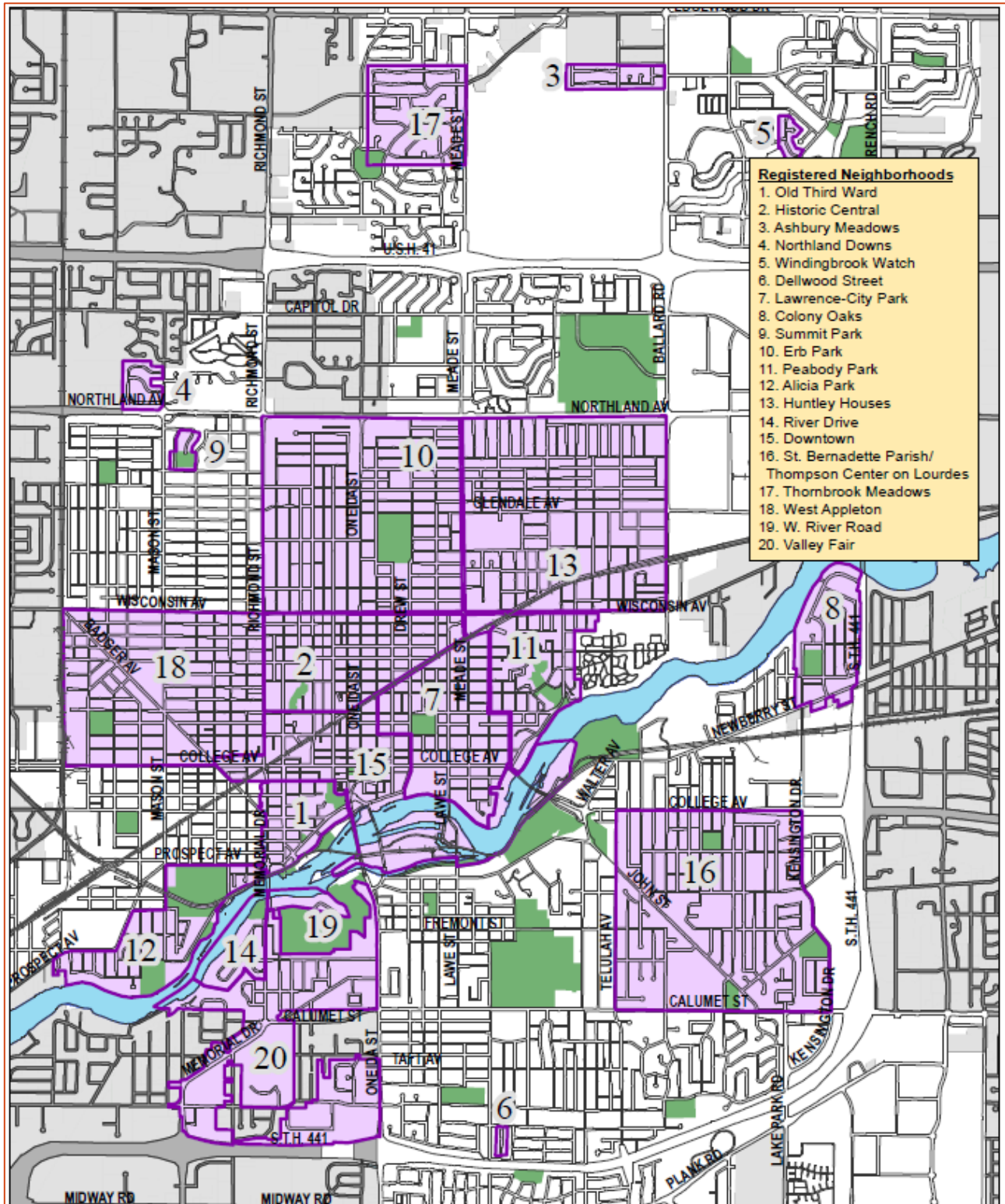
## **NEIGHBORHOOD PROGRAM**

The Neighborhood Program was created in October 2012, with the goal of strengthening Appleton's neighborhoods by building strong bonds, engaging social capital, encouraging investment, and leveraging local resources. Beginning in the summer of 2013, staff developed a program brochure, conducted interviews with the Post-Crescent and local news and television agencies, and created the City's Neighborhood Program webpage which serves as the one-stop shop for all information on the program. These efforts increased awareness of the program and increased participation by Appleton residents.

The foundation of the program is the neighborhood registry. Residents are asked to register their neighborhoods by meeting with fellow residents to identify the neighborhood's primary and secondary contacts, create a neighborhood name, and define the neighborhood's boundaries. We have a total of 20 registered neighborhoods throughout the City. Registered neighborhoods are completely or partially located in all 15 Aldermanic Districts in the City. The central city neighborhoods north, south, and east of downtown are highly represented by five registered neighborhoods (Old Third Ward, Historic Central Neighborhood, Lawrence-City Park, Peabody Park, and Downtown).

There were no applications for The Neighborhood Grant Program (TNGP) in 2020. Staff believes this does not reflect the need or value of TNGP, but rather the difficulty in neighborhood gatherings, meetings, and hesitance to "doorknock" due to COVID-19.

One primary goal of the Neighborhood Program is to increase communication between Appleton's neighborhoods and City Hall. Two virtual neighborhood program meetings were held in 2020, one in spring and another in fall. Both "roundtable" discussions provided opportunities for residents to share their experiences as neighborhood leaders among peers, strengthen their neighborhoods, and establish a clear line of communication with the City and each other. Program staff assist Appleton's neighborhoods through communication in a variety of ways. First, we receive direct contact from neighborhood leaders regarding issues in their neighborhoods. Staff also contacts neighborhoods on various topics such as when a developer or the City is proposing a project that may directly or indirectly impact a registered neighborhood. A map of all Registered Neighborhoods is on the following page:



Registered Neighborhoods - Sept 2019



## RECENT CITY INVESTMENTS/ACTIVITIES PROMOTING GROWTH

- A. The Appleton Redevelopment Authority (ARA) approved creation of the ARA Business Enhancement Grant program. Modeled after the Business Enhancement Grant Programs available in TIFs 11 and 12, this provides matching grants of up to \$7,000 for businesses throughout the City.
- B. Tax Incremental Financing (TIF) Districts #3 and #11 boundaries were amended in 2020 to include more properties eligible for TIF support in areas north of College Avenue.
- C. A commitment by the City to proceed with a new library at its current location provides a catalyst for the area north of College Avenue and allows the YMCA to make decisions for the future of the Soldier Square Ramp site.
- D. A full north/south two-way Appleton Street bridge was completed in 2019.
- E. The extension of Spartan Drive started in 2019 and will be complete in 2025 from Meade Street to Highway 47.
- F. Evergreen Drive (east of Richmond Street) reconstructed underground infrastructure work was completed in 2018. Paving was completed in 2019. This area is expected to see additional growth with the recently opened Meijer across the street in the Town of Grand Chute. Land at the southeast corner of Highway 47 and Evergreen was annexed into the City in 2019 for the Evergreen Heights project. Construction was paused due to COVID-19 but is expected to start in 2021.
- G. The City of Appleton purchased (in 2016), and annexed into the City (in 2019), two properties totaling approximately 23 acres on Edgewood Drive long identified as future commercial/industrial use on the Future Land Use Map. While not yet served by City utilities, the City continues to manage these properties to provide for additional growth in the future.
- H. A lift station was added in 2017 to accommodate approximately 950 acres of growth on the north side; it is located southeast of the intersection of Broadway Drive and Richmond Street, adjacent to future Spartan Drive.
- I. Staff collaborated with the City Attorney's Office and Inspection Division to update Zoning Ordinance standards to be consistent with the changes to Wisconsin's Local Land Use Enabling Laws (Zoning Board of Appeals and Variances, City Plan Commission and



Common Council decisions on special use permits, nonconforming manufactured home regulations, revised and create new definition terms as needed), add new regulations for wineries, brewpubs, distilleries consistent with industry standards and Wisconsin State Statutes, create new zero lot line duplex development standards, administrative parking variances, site plan updates, self-storage removed from the C-2 zoning district, C-1 zoning district amended to create a new and flexible mixed use zoning district and a number of other minor revisions to eliminate inconsistent, vague or confusing language to enhance "user friendliness" and "consistent administration/enforcement" of the Zoning Ordinance. The Common Council approved these Zoning Ordinance text amendments, and they went into effect on March 24, 2020.

- J. Staff facilitated and approved the Plamann Park, Broadway Hills Estates, Cain, Sequoia Drive, and Trail View Estates South annexations, resulting in roughly 313 acres of land being annexed.
- K. The Future Land Use Map was amended from the Multi-Family Residential designation to the One and Two-Family Residential designation for the Trail View Estates South subdivision. The subject area includes approximately 32 acres.

## CHALLENGES TO GROWTH

- A. COVID-19 has had far-reaching impacts on workforce, workplace, safety protocols and more. While rollout of vaccines is encouraging, there is still great uncertainty regarding returning to work, the potential ongoing "convenience economy" and more. These changes will have significant impacts on the real estate market going forward as well. Staff continues to monitor real estate forecasts to ensure the City is poised to continue to accommodate and proactively respond to the needs, challenges and desires of the post pandemic workforce/workplace.
- B. Net new construction for the City was lower than most of our neighboring communities, which will limit the City's ability to raise the tax levy. This may have negative impacts on services provided, maintenance, safety, public health, infrastructure, etc. Appleton's downward trend of net new construction as a percentage of the Fox Cities equalized value will have to change if the City wants financial resources to support current demands and future growth of the City without increasing debt, limiting or decreasing staff, or changing operations given the current State legislation.



- C. Over the past few years, a series of incorporations by surrounding municipalities on the City's south side has resulted in a limitation to the City's growth corridor to the south.
- D. Significant road improvements are needed to Apple Creek Road and Broadway Drive that require widening, including the acquisition of new right-of-way. French Road, north of Edgewood Drive, is a rural two-lane road. Future development could necessitate the widening and urbanizing of French Road.
- E. Regulatory floodplains are known to exist on the northside which will restrict the suitability of those areas for future growth.
- F. As growth continues to fill in subdivisions and commercial space, the area may need additional police, fire, school and recreational areas to meet growing demands.
- G. Limitations of the existing utility infrastructure and coordinating their expansion with timing of development and resources will have to be closely coordinated.
- H. Open green space and recreational amenities have been identified as a need on the south side. There is limited land available on the City's south side with sufficient size to accommodate a community park. Staff outlined several potential sites for a community park in 2017; however, Council did not recommend pursuit of any of the options.

## PROJECTS ON THE HORIZON

- A. U.S. VENTURE: U.S. Venture announced it plans to construct a new headquarters building on the "Bluff" site in downtown Appleton. This will bring approximately 1,000 employees and will add a minimum of \$54.5 million in assessed value to our downtown. Details of the Development Agreement continue to be discussed and finalized.
- B. BLOCK 800: The Block 800 project started construction in 2020 and will be complete in 2021. This will include 20 residential units and 10,000 square feet of commercial space downtown on the west end of College Avenue.
- C. RIVERHEATH DEVELOPMENT: Tanesay Development broke ground on the RiverHeath Event Space (RES) in 2020 with anticipated completion in Summer 2021.

- D. CRESCENT LOFTS: The Crescent Lofts began construction in Spring 2020 and will be complete in 2021. When complete, a total of 69 residential units will be added to the downtown, 58 of which will be affordable housing.
- E. 320 EAST COLLEGE: This six story project started construction in 2020 and will add 39 residential units and commercial space along College Avenue when complete in Fall 2021.
- F. BLUE RAMP/FORMER CONWAY HOTEL SITE: Merge Urban Development negotiated an option to purchase through May 31, 2021 for these two sites and is working on due diligence for a mixed use development.
- G. F STREET DEVELOPMENT: F Street Development purchased approximately 14 acres, with an additional 36 acres under contract, in the Southpoint Commerce Park. Construction of the first in a series of speculative warehouse/distribution buildings began in 2020. The initial 218,000 square foot building will be complete in Spring 2021.

## OPPORTUNITIES

- A. The City currently has 100+ acres of fully improved land available for development in the Southpoint Commerce Park and an additional 100+ acres with planned improvements. 2020 saw the sale of 14 acres to F Street Development with an additional 36 acres under contract.
- B. Opportunities will become more apparent on the “Bluff” site and surrounding area as plans are finalized for U.S. Venture and their relocation to downtown Appleton.
- C. Recently completed amendments to TIF Districts #3 and #11 will allow TIF support for parcels north of College Avenue.
- D. Privately owned land is still available for office developments north of I-41 along Enterprise Avenue and Evergreen Drive. Additional privately owned parcels are available in the Northeast Business Park area.
- E. The City of Appleton has approximately 204 single-family lots available for sale in established subdivisions, the majority of which are located on the north side. Plats for over 143 new single-family lots were approved in 2020, some already available (not all have been recorded yet). There are additional planned single-family lots within the City that are unplatted as well.

F. The City of Appleton has supported the efforts of the Fox Cities Regional Partnership, both financially and operationally, since 2012 with a total investment of \$271,500 since the Partnership's creation. Many of these investments are to help support attracting and retaining a trained, innovative, and creative workforce to the City. In light of COVID-19, the Chamber participated in the Stronger Together Coalition, surveyed the needs 142 businesses, followed up with 50 businesses for financial assistance, drafted over 220 letters for Wisconsin Economic Development Corporation (WEDC)'s "We're all in" Grants, purchased and installed Synchronist to track business retention data and provide reports. They also formed a workgroup on funding and governance which the City of Appleton has participated in. Additionally, the Chamber proceeded with prioritizing their legislative lobbying efforts, including TIF legislation, workforce development and transportation and infrastructure.

## STRATEGY/MARKETING

### A. Comprehensive Plan Update 2010-2030

A Comprehensive Plan is intended to guide the growth and development of a community. It is a long range plan, addressing current issues while also looking beyond to future issues and opportunities with the City. It includes analysis, recommendations and implementation strategies which will impact a community's population, economy, housing, transportation, community facilities, recreation-open space, and land use. A Comprehensive Plan establishes a vision for future land use, physical development, and quality of life in the City, as well as provides a comprehensive set of goals, policies and initiatives to achieve that vision. The Economic Development Strategic Plan, completed in 2015, was incorporated into the Comprehensive Plan which was adopted by the Common Council on March 15, 2017.

Implementation of the Updated Comprehensive Plan continued in 2020, with highlights that include redevelopment on the west and north ends of downtown, numerous amendments to the Zoning Ordinance, increased commercial development along the Richmond Street corridor, annexations and right-of-way dedications to facilitate new growth and continued riverfront redevelopment.

## **B. The Fox Cities Economic Development Professionals (FCEDP)**

FCEDP exists to build professional relationships among economic development professionals and to share best practices to advance our region's economy. This is done through; professional development and networking, facilitating communication, learning about best practices and establishing collaborative efforts among economic development organizations within the region.

The FCEDP group continued to meet virtually in 2020 with a model alternating between having a speaker in to discuss best practices and a roundtable discussion on a topic of importance to the group. The City of Appleton continues to remain committed to and actively engaged in FCEDP.

## **C. Marketing**

Staff partnered with Locate in Wisconsin, Catylist and CoStar to reach the commercial real estate and development community and market City-owned sites. All of the above-mentioned services are online resources for commercial real estate brokers, site selectors, and companies to research available sites within our community from anywhere in the world.

The City of Appleton was a sponsor of the Manufacturing First Virtual conference in 2020. The event drew over 700 attendees. The annual InDevelopment Conference was cancelled this year due to COVID-19; however, the City participated in supporting a special issue of Insight magazine dedicated to real estate development.

Sponsoring of small business initiatives was also a key focus in 2020 with the sponsorship of Small Business Saturday, Appleton Northside Business Association's Annual Government Meeting, and Appleton Downtown Incorporated programming, among others.

COVID-19 has created a number of challenges for businesses and individuals located in the City of Appleton. Over 2020, the Community & Economic Development Department has put a great deal of effort into contacting businesses to ensure they are receiving the support they need, being connected with resources for Paycheck Protection Program (PPP) loans, WEDC programs, safety protocols, educational opportunities and more during this time.

