



# City of Appleton

100 North Appleton Street  
Appleton, WI 54911-4799  
www.appleton.org

## Meeting Agenda - Final City Plan Commission

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Wednesday, August 28, 2024

3:30 PM

Council Chambers, 6th Floor

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

[24-1113](#) City Plan Minutes from 8-14-24

Attachments: [City Plan Minutes 8-14-24.pdf](#)

### 5. Public Hearing/Apearances

[24-1114](#) Planned Development (PD) Rezoning #8-24 for the subject parcels located at 2111 South Schaefer Street (Tax Id #31-9-1114-00) and 2121 & 2125 South Schaefer Street (Tax Id #31-9-1114-01), including to the centerline of the adjacent right-of-way, as shown on the attached maps, from PD/C-2 Planned Development General Commercial District #61-94 and PD/C-2 Planned Development General Commercial District #10-21 to PD/C-2 Planned Development General Commercial District #8-24, along with the attached Implementation Plan Document and Development Plan (Associated with Action Item #24-1115)

Attachments: [InformalPublicHearingNotice\\_2111\\_2121\\_2125SSchaeferSt\\_Rezoning#8-24.pc](#)

### 6. Action Items

[24-1115](#) Request to approve Planned Development (PD) Rezoning #8-24 for the subject parcels located at 2111 South Schaefer Street (Tax Id #31-9-1114-00) and 2121 & 2125 South Schaefer Street (Tax Id #31-9-1114-01), including to the centerline of the adjacent right-of-way, as shown on the attached maps, from PD/C-2 Planned Development General Commercial District #61-94 and PD/C-2 Planned Development General Commercial District #10-21 to PD/C-2 Planned Development General Commercial District #8-24, along with the attached Implementation Plan Document and Development Plan

Attachments: [StaffReport\\_2111\\_2121\\_2125SSchaeferSt\\_Rezoning\\_For08-28-24.pdf](#)

[24-1116](#)

Annual review and request to approve the Downtown Appleton Business Improvement District (BID) 2025 Operating Plan

**Attachments:** [StaffReport\\_2025BIDOperatingPlan\\_For08-28-24.pdf](#)

[2025 BID Operating Plan.pdf](#)

[2023 BID Annual Report.pdf](#)

[2023 BID Audit - Financial Statements.pdf](#)

**7. Information Items**

**8. 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 Kara Homan, Director, Community Development Department at 920-832-6468.*

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



# City of Appleton

100 North Appleton Street  
Appleton, WI 54911-4799  
www.appleton.org

## Meeting Minutes - Final City Plan Commission

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Wednesday, August 14, 2024

3:30 PM

Council Chambers, 6th Floor

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1. Call meeting to order

Meeting called to order by Chair Mayor Woodford at 3:30 p.m.

2. Pledge of Allegiance

3. Roll call of membership

**Present:** 7 - Palm, Robins, Mayor Woodford, Uitenbroek, Neuberger, Fenton and Carpenter

*Others present:*

*Theresa Kent, 315 N. Drew Street*

*Bill Bultman, 319 N. Drew Street*

4. Approval of minutes from previous meeting

[24-1028](#)

City Plan Minutes from 7-24-24

**Attachments:** [City Plan Minutes 7-24-24.pdf](#)

**Palm moved, seconded by Fenton, that the Minutes be approved. Roll Call.**

**Motion carried by the following vote:**

**Aye:** 7 - Palm, Robins, Mayor Woodford, Uitenbroek, Neuberger, Fenton and Carpenter

5. **Public Hearing/Appearences**

[24-1029](#)

Rezoning #7-24 for the subject parcel located at 319 North Drew Street (Tax Id #31-2-0486-00), including to the centerline of the adjacent right of way, as shown on the attached maps, from R-2 Two-Family District to R-1C Central City Residential District (Associated with Action Item #24-1030)

**Attachments:** [InformalPublicHearingNotice\\_319NDrewSt\\_Rezoning#7-24.pdf](#)

*This public hearing was held and no one spoke.*

**This public hearing was held, and no one spoke on the item.**

[24-1031](#)

The street discontinuance to vacate a portion of N. Sampson Street public right-of-way located south of E. Winnebago Street and adopt the Initial Resolution and exhibit map (Associated with Action Item #24-1032)

**Attachments:** [InformalPublicHearingNotice\\_NSampsonSt\\_SouthofWinnebago\\_Street\\_Vacation.pdf](#)

*This public hearing was held and no one spoke.*

**This public hearing was held, and no one spoke on the item.**

## 6. Action Items

[24-1030](#)

Request to approve Rezoning #7-24 for the subject parcel located at 319 North Drew Street (Tax Id #31-2-0486-00), including to the centerline of the adjacent right of way, as shown on the attached maps, from R-2 Two-Family District to R-1C Central City Residential District

**Attachments:** [StaffReport\\_319NDrewSt\\_Rezoning\\_For8-14-24.pdf](#)

*Proceeds to Council on September 4, 2024.*

**Fenton moved, seconded by Palm, that Rezoning #7-24 be recommended for approval. Roll Call. Motion carried by the following vote:**

**Aye:** 7 - Palm, Robins, Mayor Woodford, Uitenbroek, Neuberger, Fenton and Carpenter

[24-1032](#)

Request to approve the street discontinuance to vacate a portion of N. Sampson Street public right-of-way located south of E. Winnebago Street and adopt the Initial Resolution and exhibit map

**Attachments:** [StaffReport\\_NSampsonSt\\_StreetVacation\\_For8-14-24.pdf](#)

**Carpenter moved, seconded by Robins, that the street discontinuance be recommended for approval. Roll Call. Motion carried by the following vote:**

**Aye:** 7 - Palm, Robins, Mayor Woodford, Uitenbroek, Neuberger, Fenton and Carpenter

[24-1033](#)

Request to approve the land disposition of the land locked parcel located between E. Winnebago Street and Bellaire Court (Tax Id #31-1-1275-00), in accordance with Wis. Stat. §62.23(5) pertaining to surplus of public lands, as shown on the attached map

**Attachments:** [DispositionofSurplusLand\\_MemotoCPC\\_For8-14-24.pdf](#)

**Fenton moved, seconded by Neuberger, that the land disposition be recommended for approval. Roll Call. Motion carried by the following vote:**

**Aye:** 7 - Palm, Robins, Mayor Woodford, Uitenbroek, Neuberger, Fenton and Carpenter

**7. Information Items**

[24-1034](#)

West College Avenue - A NEW Avenue Presentation (continued discussion from the 7-24-24 Plan Commission meeting)

**Attachments:** [W College Ave\\_PPT Elected Officials.pdf](#)

**This item was presented and discussed.**

**8. Adjournment**

**Fenton moved, seconded by Robins, that the meeting be adjourned at 3:56 p.m. Roll Call. Motion carried by the following vote:**

**Aye:** 7 - Palm, Robins, Mayor Woodford, Uitenbroek, Neuberger, Fenton and Carpenter

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

Dear property owner(s):

The City of Appleton Plan Commission will conduct a Public Hearing on Wednesday, August 28, 2024, at 3:30 P.M., or as soon thereafter as can be heard, in Common Council Chambers, 6th Floor, City Hall, 100 North Appleton Street, for the following proposed rezoning request.

**Common Description:**

2111 S. Schaefer Street (Tax ID #31-9-1114-00) and 2121 & 2125 S. Schaefer Street (Tax ID #31-9-1114-01), including to the centerline of the adjacent street right-of-way.

**Rezoning Request:** A rezoning request has been initiated by the owner and applicant, KKREW Properties/Dean Kroening, in the matter of amending Chapter 23 (Zoning Ordinance) of the Municipal Code of the City of Appleton for the above-described real estate, which is currently zoned PD/C-2 Planned Development General Commercial District #61-94 and PD/C-2 Planned Development General Commercial District #10-21. The owner and applicant propose to rezone the property to PD/C-2 Planned Development General Commercial District #8-24 (see attached maps).

**Purpose of the Rezoning:** The owner/applicant proposes to rezone the subject parcels to PD/C-2 Planned Development General Commercial District #8-24 to establish clear and consistent development standards. In addition, the owner/applicant intends to combine the lots through the Certified Survey Map (CSM) process following the rezoning. The attached development plan drawing shows the general location of existing and potential buildings.

**Aldermanic District:** 5 – Alderperson Katie Van Zeeland

You are being notified as a policy of the City of Appleton Community Development Department. All persons interested are invited to attend this meeting and will be given an opportunity to be heard. Feedback can also be shared with Plan Commission members via written letter or email. The Plan Commission makes a recommendation to the Common Council who makes the final decision on the matter.

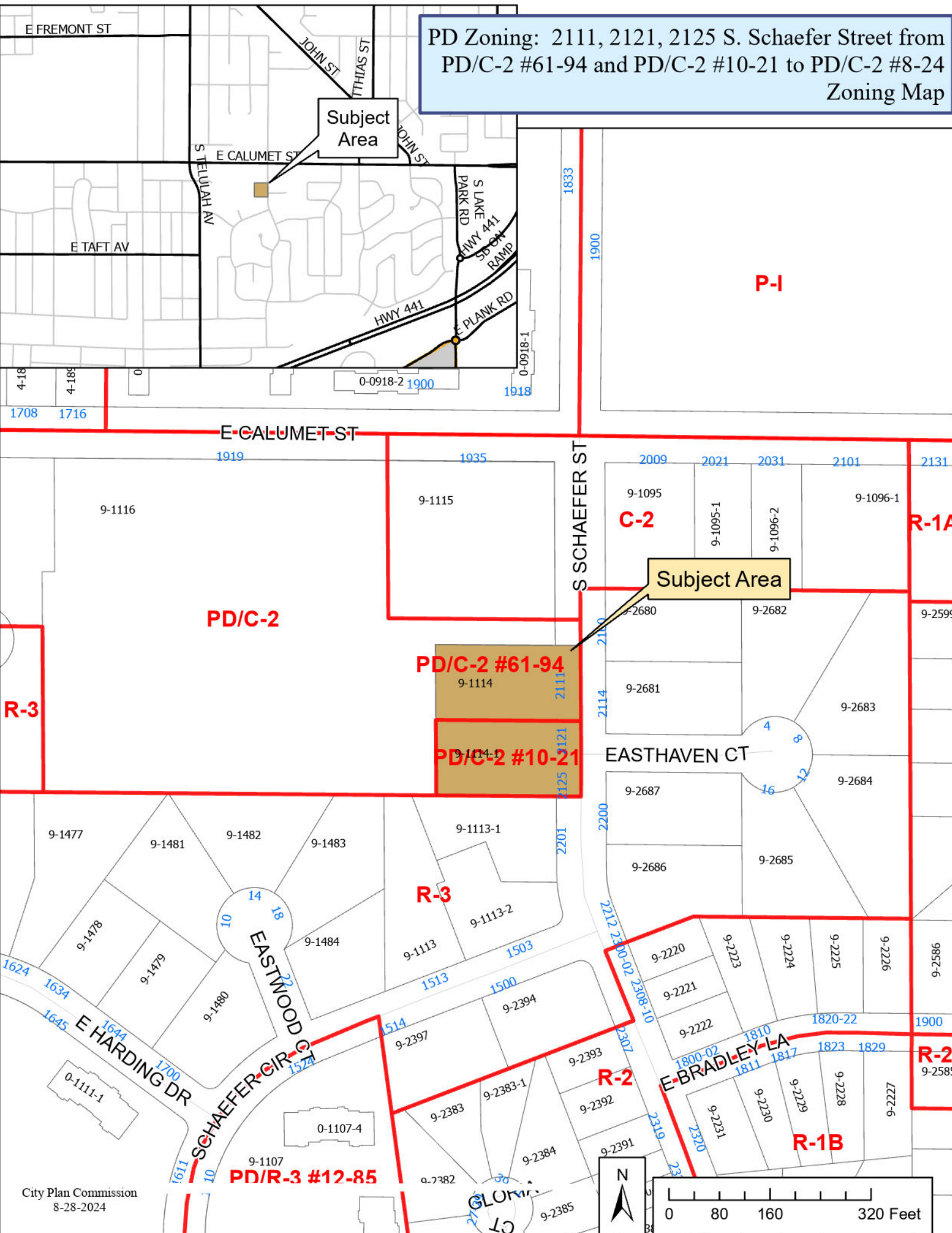
Any questions regarding this matter should be directed to Colin Kafka, Principal Planner, in the Community Development Department at 920-832-6476 or by email at [Colin.Kafka@appletonwi.gov](mailto:Colin.Kafka@appletonwi.gov)

CITY PLAN COMMISSION  
APPLETON, WISCONSIN

COMMUNITY DEVELOPMENT DEPARTMENT  
CITY HALL – 100 NORTH APPLETON STREET  
APPLETON, WISCONSIN 54911-4799  
(920) 832-6468

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

PD Zoning: 2111, 2121, 2125 S. Schaefer Street from PD/C-2 #61-94 and PD/C-2 #10-21 to PD/C-2 #8-24  
Zoning Map



Subject Area

Subject Area



PD Zoning: 2111, 2121, 2125 S. Schaefer Street from  
PD/C-2 #61-94 and PD/C-2 #10-21 to PD/C-2 #8-24  
Aerial Map



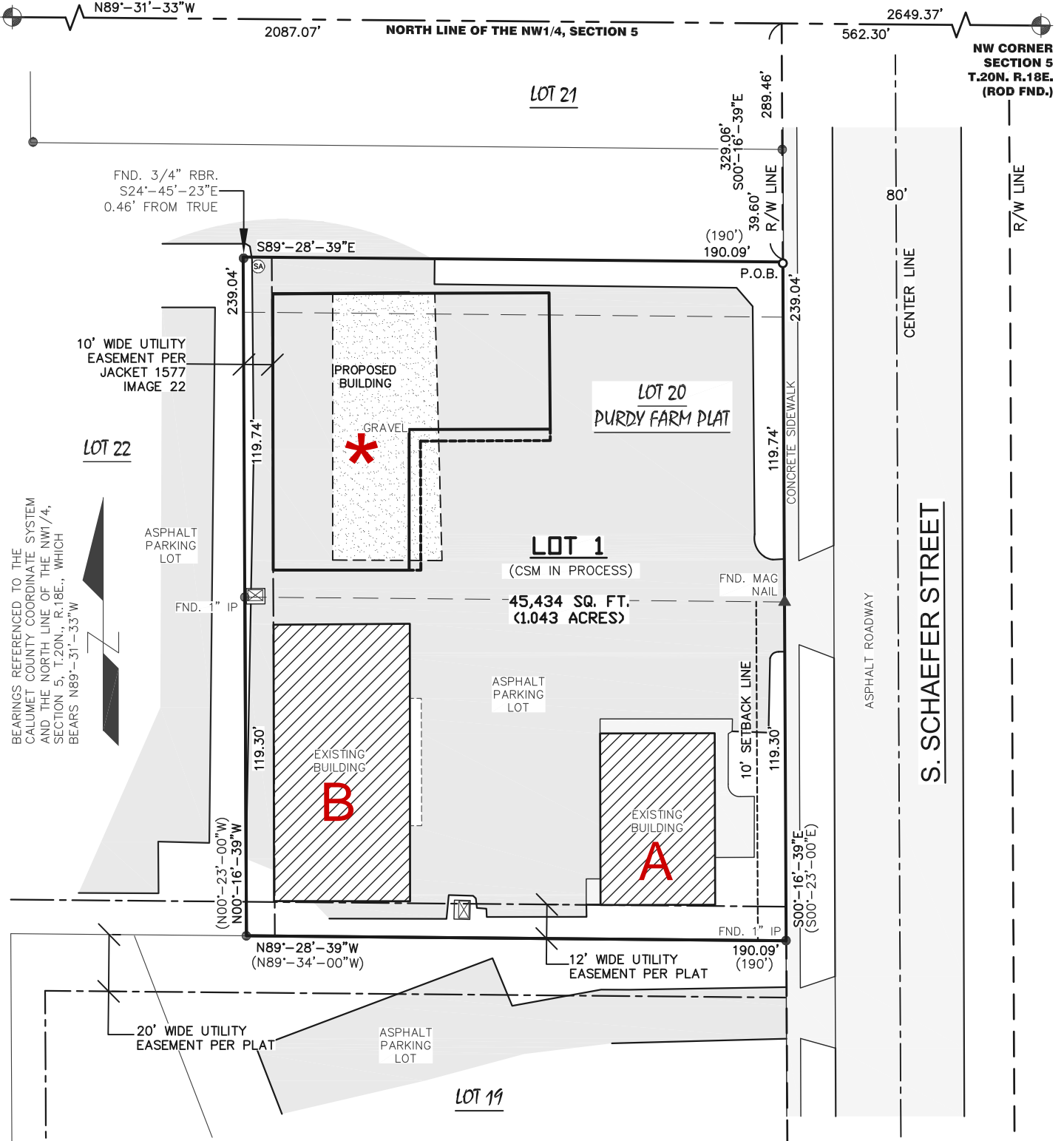


# EXHIBIT B

## CONCEPTUAL SITE IMPROVEMENT PLAN

ALL OF LOT 20 AND ALSO A PART OF LOT 22, PURDY FARM PLAT, LOCATED  
IN THE NE1/4 OF THE NW1/4, SECTION 5, T.20N., R.18E., CITY OF APPLETON,  
CALUMET COUNTY, WISCONSIN

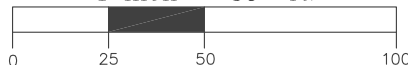
**N1/4 CORNER  
SECTION 5  
T.20N. R.18E.  
(CHISELED X FND.)**



**—LEGEND—**

- = 1" X 24" IRON PIPE SET (1.130 LB./FT.)
- = 3/4" REBAR FOUND
- ⊕ = COUNTY MONUMENT FOUND
- ( ) = RECORDED INFORMATION
- ⊠ = ELECTRIC TRANSFORMER
- Ⓢ = SANITARY MANHOLE

GRAPHIC SCALE  
1 inch = 50 ft.



**\* Gravel to be replaced according to Demolition Permit B23-0141**

**MERIDIAN SURVEYING, LLC**

N9637 Friendship Drive Office: 920-993-0881  
Kaukauna, WI 54130 Fax: 920-273-6037

DRAWN BY: J.B.	FIELD WORK DATE: 6-28-24
CHECKED BY: S.C.D.	FIELD BOOK: M-58, PG. 73
JOB NO.: 15550	SHEET 1 OF 4

SURVEYED FOR:  
KKREW PROPERTIES LLC.  
N4276 KILLARNEY LN.  
FREDOM, WI 54130



# CITY OF APPLETON

## MEMORANDUM

**Date:** August 28, 2024  
**To:** Plan Commission  
**From:** Colin Kafka, Principal Planner  
**Subject:** Rezoning #8-24: Rezoning 2111, 2121, and 2125 South Schaefer Street to PD/C-2 #8-24

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## GENERAL INFORMATION

**Owner/Applicant:** KKREW Properties c/o Dean Kroening

**Address/Parcel Number:** 2111 S. Schaefer Street (Tax ID #31-9-1114-00) and 2121 & 2125 S. Schaefer Street (Tax ID #31-9-1114-01)

**Petitioner's Request:** The owner/applicant proposes to rezone 2111 S. Schaefer Street (Tax ID #31-9-1114-00) and 2121 & 2125 S. Schaefer Street (Tax ID #31-9-1114-01) to PD/C-2 Planned Development General Commercial District #8-24 to establish clear and consistent development standards for the subject parcels. In addition, the owner/applicant intends to combine the lots through the Certified Survey Map (CSM) process following the rezoning.

**Plan Commission Informal Hearing Meeting Date:** August 28, 2024

**Common Council Public Hearing Meeting Date:** September 18, 2024

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## BACKGROUND

March 21, 1985 - The Calumet Street Planned Development District #34-84 (PD/C-2 Planned Development General Commercial District #34-84) was approved to allow for the construction of a Shopping Center Complex with a mix of retail, professional services, personal services, restaurant uses and an 8-unit multi-family apartment building to be located on Property Tax ID#'s 31-9-1114-00, 31-9-1117-00, 31-9-1114-01, 31-9-1116-00, and 31-9-1118-00.

May 18, 1994 - Ordinance 61-94 was adopted, which repealed and recreated the Zoning Ordinance. This Zoning Ordinance introduced the Planned Development (PD) Overlay District. As a result, the zoning classification of the properties within the PD/C-2 Planned Development General Commercial District #34-84 changed to PD/C-2 Planned Development General Commercial District #61-94.

June 2, 2004 - Ordinance 74-04 was adopted, which repealed and recreated the Zoning Ordinance that is currently in place. This Zoning Ordinance included a section on transition rules. Section 23-35(c) states, "Planned development districts in force at the time of adoption of this ordinance shall continue to be controlled under the standards of the existing planned development district until rezoned by Common Council. However, processes for approving or amending adopted final

development plans, plats, certified survey maps, or site plans, shall follow the procedures of this ordinance.”

October 6, 2021 - The Common Council approved the rezoning of Parcel #31-9-1114-01 to PD/C-2 Planned Development General Commercial District #10-21, which removed the parcel from the PD/C-2 Planned Development General Commercial District #61-94 (Rezoning #10-21).

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## STAFF ANALYSIS

**Project Summary:** The owner/applicant is proposing to combine parcels #31-9-1114-00 and #31-9-1114-01 through the Certified Survey Map (CSM) process. An individual lot must be within a single zoning district. This proposal to rezone the subject parcels to PD/C-2 Planned Development General Commercial District #8-24 will allow for the combination of the lots through the CSM process and will also establish clear and consistent development standards that ensure conformance to zoning code standards.

**Existing Site Conditions:** The subject site consists of parcel #31-9-1114-00, which is approximately 22,756 square feet and parcel #31-9-1114-01, which is approximately 22,678 square feet. The total site is approximately 45,434 square feet in size. These parcels are located on South Schaefer Street, south of East Calumet Street. A car wash was located on parcel #31-9-1114-00 but was demolished in 2023 (Permit No. B23-0141). The site is now vacant. Two multi-tenant commercial buildings and an associated off-street parking lot are located on parcel #31-9-1114-01. The building on the southeast corner of the lot was built in 1990 and is 2,440 square feet. The building on the southwest corner of the lot was built in 2023 (Site Plan #26-22) and is 3,950 square feet.

**Surrounding Zoning and Land Use:** The surrounding area is under the jurisdiction of the City of Appleton (north, south, east, and west). The uses are commercial and multi-family residential in nature.

North: PD/C-2 Planned Development General Commercial District #61-94. The adjacent land uses to the north are currently a mix of commercial uses.

South: R-3 Multi-Family District. The adjacent land use to the south is currently multi-family residential.

East: R-3 Multi-Family District. The adjacent land use to the east is currently multi-family residential.

West: PD/C-2 Planned Development General Commercial District #61-94. The adjacent land uses to the west are currently a mix of commercial uses.

**Proposed Zoning Classification:** The planned development overlay district allows an applicant to propose uses, development and density standards, and design guidelines for the subject property. Overlay districts provide supplemental regulations in addition to, but not necessarily more restrictive than the “base” or underlying zoning district regulations. The customized regulations, as identified in the attached Implementation Plan Document (IPD), were prepared to specify standards that are unique to the overlay district PD/C-2 #8-24. The proposed development standards for PD/C-2 #8-24 are listed below:

- 1) **Minimum lot area:** 14,000 square feet
- 2) **Maximum lot coverage:** 90% \*
- 3) **Minimum lot width:** 60 feet
- 4) **Minimum front yard:** 10 feet

- 5) **Minimum rear yard:** 10 feet \*
- 6) **Minimum side yard:**
  - a. None.
  - b. 10 feet if abutting a residentially zoned district.
- 7) **Maximum building height:** 35 feet.

**\*Development Standard Exceptions:**

Minimum rear yard building setback: 10 feet (C-2 Zoning District requires a minimum 20-foot rear yard setback)

Maximum Lot Coverage: 90% (C-2 Zoning District allows 75% maximum lot coverage)

**Development Plan Summary:** The proposed PD #8-24 would facilitate future development of the subject site. The attached development plan drawing (Exhibit B) showcases the location of existing buildings and the general location of a potential future building on the site. Further details regarding the development of a future building on the site would be determined and reviewed through the Site Plan review process prior to the issuance of a building permit by the Inspections Division.

**Zoning Ordinance Review Criteria:** A rezoning is often triggered by development proposals or changing circumstances in the City. In this case, the request is being made to allow for the combination of the subject lots and to facilitate future development of the site. Both the existing and future development conditions deviate from C-2 zoning regulations and development standards, specifically rear setback, lot coverage, and off-street parking standards. If approved, any future development would need to conform to the customized zoning regulations identified in the IPD, as well as other sections of the Zoning Ordinance. Section 23-151 of the Zoning Ordinance establishes criteria for designating a PD overlay district, including requirements on the amount of street frontage, size of the district and percent of open space. The proposed planned development overlay district would comply with these minimum standards.

**Findings of Fact:** This request was reviewed in accordance with the standards for granting a PD Overlay District, Development Plan, and Implementation Plan Document under Section 23-151(o) of the Municipal Code: It appears the criteria established has been satisfied. Related excerpts are listed below.

- 1) In what respects the proposed plan is or is not consistent with the stated purpose, requirements and standards of the PD regulations. *Findings: No inconsistencies found. The existing and proposed uses and structures identified in the conceptual site plan are consistent with the requirements and standards of the PD regulations.*
- 2) The extent to which the proposed plan departs from the zoning and subdivision regulations otherwise applicable to the subject property and the reasons why such departures are or are not deemed to be in the public interest. *Findings: The zoning ordinance exceptions listed in the draft Implementation Plan Document #8-24 are identical to the previously approved exceptions for parcel #31-1-1114-01 found in Implementation Plan Document #10-21. The proposed zoning ordinance exceptions do not appear to cause undue adverse impact on the public or character of the existing neighborhood or other matters affecting the public health, safety, or general welfare.*
- 3) The extent of public benefit of the PD in terms of meeting planning objectives and enhancing the tax base and economic development. Any specific beneficial actions, plans, or programs agreed to in the PD proposal which are clearly beyond the minimum requirements of this chapter shall be specifically listed as evidence of justified exceptions. *Findings: PD Overlay District #8-24 will enhance the City's tax base and promote the goals and objectives of the Appleton*

*Comprehensive Plan 2010-2030, as stated in this report. The proposed PD provides standards that support infill development as structures depicted in the conceptual site plan.*

- 4) The physical design of the proposed plan and the manner in which said design makes adequate provision for public services, provides adequate control over vehicular traffic, provides for common open space and furthers the amenities of light, air, recreation and visual enjoyment. *Findings: The proposed uses and structures identified in the conceptual site plan will further be evaluated by staff with these factors in mind when development progresses into the site plan review process.*
- 5) The relationship and compatibility of the proposed plan to the adjacent properties and neighborhood. *Findings: The proposed uses and structures depicted in the conceptual site plan appears to be compatible with the existing adjacent commercial properties and residential neighborhood.*

**Appleton Comprehensive Plan 2010-2030:** Community Development staff has reviewed this proposal and determined it is compatible with the goals and objectives found in the City's *Comprehensive Plan 2010-2030*. The proposed PD/C-2 Planned Development General Commercial District #8-24 is also consistent with the Commercial designation identified on the Future Land Use Map. Listed below are related excerpts from the City's *Comprehensive Plan 2010-2030*.

*Goal 1 – Community Growth*

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

*Goal 8 – Economic Development*

*Appleton will pursue economic development that retains and attracts talented people, brings good jobs to the area, and supports the vitality of its industrial areas, downtown, and neighborhood business districts.*

**OBJECTIVE 9.4 Economic Development:**

*Ensure the continued vitality of downtown and the City's neighborhood commercial districts.*

**OBJECTIVE 9.5: Economic Development:**

*Encourage new development and redevelopment activities that create vital and attractive neighborhoods and business districts.*

**OBJECTIVE 10.1 Land Use:**

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

**OBJECTIVE 10.5 Land Use:**

*Support the continued redevelopment and revitalization of land uses adjacent to Appleton's key transportation corridors and downtown.*

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

- a. Prior to making a recommendation on a proposed rezoning, the Plan Commission shall make a finding to determine if the following conditions exist. No rezoning of land shall be approved prior to finding at least one of the following:

1. The request for a zone change is in conformance with the Comprehensive Plan for the City of Appleton. *The rezoning request is in conformance with the Comprehensive Plan 2010-2030, as the Future Land Use Map identifies this area for future commercial uses.*
  2. A study submitted by the applicant that indicates that there has been an increase in the demand for land in the requested zoning district, and as a result, the supply of land within the City mapped as such on the Official Zoning Map, is inadequate to meet the demands for such development.
  3. Proposed amendments cannot be accommodated by sites already zoned in the City due to lack of transportation, utilities or other development constraints, or the market to be served by the proposed use cannot be effectively served by the location of the existing zoning district(s).
  4. There is an error in the code text or zoning map as enacted.
- b. In addition to the findings required to be made by subsection (a), findings shall be made by the Plan Commission on each of the following matters based on the evidence presented:
1. The adequacy of public facilities such as transportation, utilities and other required public services to serve the proposed site. *This area of the City is served by existing infrastructure, and the transportation network should be adequate to serve the subject site. The parcels are currently being used for commercial purposes.*
  2. The effect of the proposed rezoning on surrounding uses. *A mix of commercial uses and multi-family residential uses are already present in this area of City and are adjacent to the parcels. The parcels are also currently zoned for and being used for commercial purposes. Any future site modifications and/or uses would be reviewed in accordance with the customized zoning regulations identified in the IPD, as well as other sections of the Zoning Ordinance. Therefore, the proposed rezoning request is consistent with the surrounding uses.*

**Technical Review Group (TRG) Report:** This item appeared on the August 6, 2024 TRG agenda. No negative comments were received from participating departments.

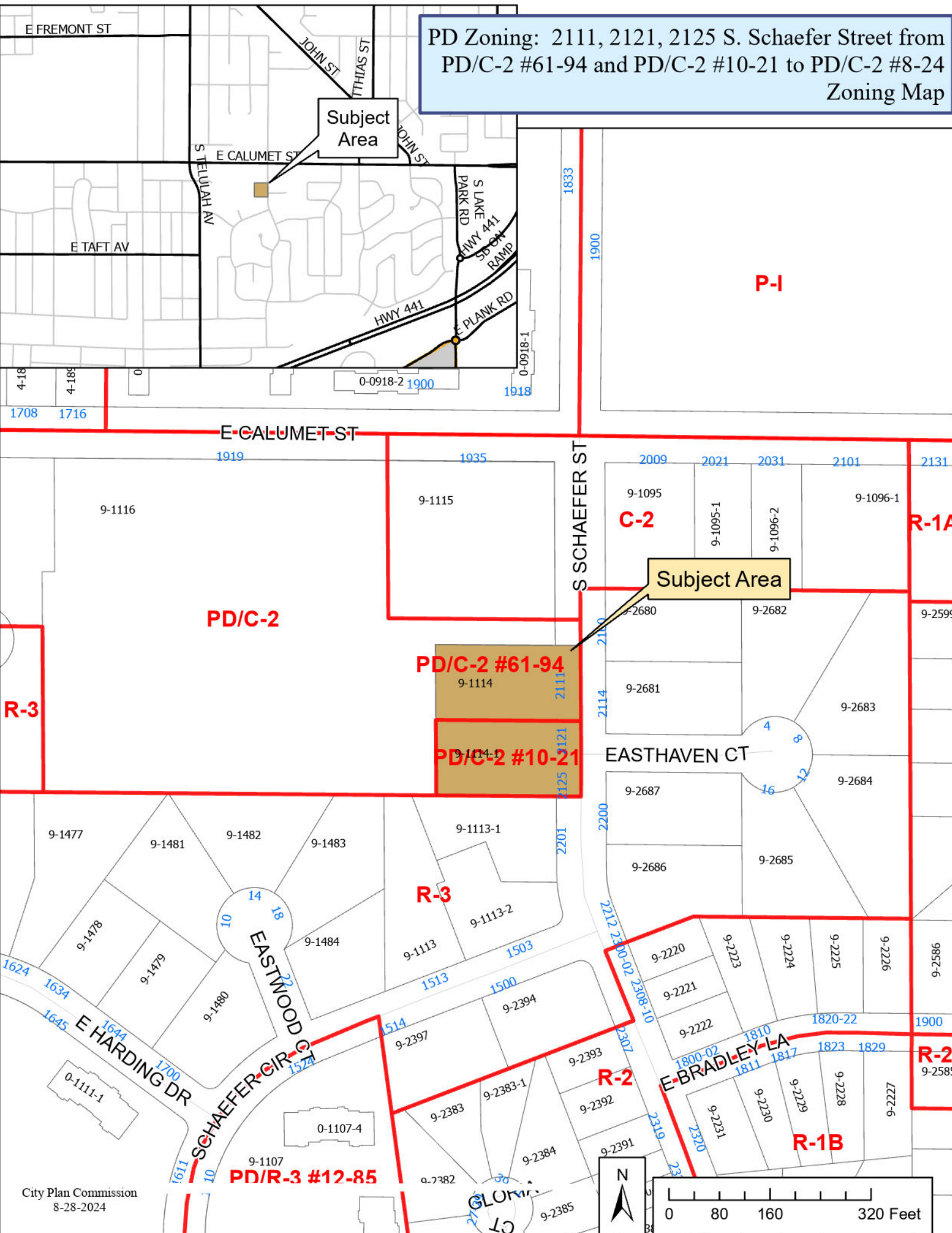
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## RECOMMENDATION

Staff recommends, based upon the standards for zoning map amendments as required by Section 23-65(d)(3) and Section 23-151(o) of the Zoning Ordinance, that Rezoning #8-24 to rezone the subject properties at 2111 S. Schaefer Street (Tax ID #31-9-1114-00) and 2121 & 2125 S. Schaefer Street (Tax ID #31-9-1114-01) from PD/C-2 Calumet Street Planned Development General Commercial District #61-94 and PD/C-2 Planned Development General Commercial District #10-21 to PD/C-2 Planned Development General Commercial District #8-24 including to the centerline of existing adjacent streets, as shown on the attached maps, **BE APPROVED** subject to the following:

1. The attached Implementation Plan Document must be notarized and signed by the property owner and then be submitted to the Community Development Department for City signatures. The Implementation Plan Document must be recorded in the Calumet County Register of Deeds' Office by the property owner per Section 23-151(m)(2)f. and g. of the Municipal Code

PD Zoning: 2111, 2121, 2125 S. Schaefer Street from PD/C-2 #61-94 and PD/C-2 #10-21 to PD/C-2 #8-24  
Zoning Map



Subject Area

Subject Area



PD Zoning: 2111, 2121, 2125 S. Schaefer Street from PD/C-2 #61-94 and PD/C-2 #10-21 to PD/C-2 #8-24  
Aerial Map



N

0 70 140 280 Feet



# IMPLEMENTATION PLAN DOCUMENT FOR PLANNED DEVELOPMENT (PD #8-24)

## PLANNED DEVELOPMENT DESIGNATION

WHEREAS, the Planned Development Designation for PD Rezoning #10-21 (PD #10-21) went into effect on the date when the Implementation Plan Document for PD #10-21 was recorded in the Calumet County Register of Deeds Office, Wisconsin, on January 18, 2022, as Document No. 567586.

WHEREAS, an official map amendment is permitted in accordance with Section 23-65(d) of the Appleton Zoning Ordinance.

WHEREAS, the property Owner/Developer desires to repeal Implementation Plan Document No. 567586 in accordance with Section 23-151(p)(1)e. of the Appleton Zoning Ordinance and replace it with this IPD, which establishes the provisions and district boundary lines, as further described below for the real estate described on the attached Exhibit A (“the Property”).

WHEREAS, Section 23-151 of the Appleton Municipal Code requires the recordation of an Implementation Plan Document in the Calumet County Register of Deeds; and

WHEREAS, the parties hereto wish to notify all interested parties of the existence of said Implementation Plan Document;

NOW, THEREFORE, in consideration of the foregoing recitals, the Owner/Developer and the City hereby notify all interested parties as follows:

1. **Existence of Implementation Plan Document for PD #8-24.** The parties hereto have entered into mutually agreeable Development and Implementation Plan Document for the Property. This designation establishes the land uses which shall be permitted or may be permitted by approval of a Special Use Permit on the property, a concept development plan, a specific implementation plan and a statement of development guidelines and conditions that must be complied with by the Owner/Developer and all subsequent property owners or agents of the property owners. This designation also specifies improvements that must be made and conditions that must be fulfilled in conjunction with this designation by the Owner/Developer.
2. **Location of Implementation Plan Document.** The Implementation Plan Document for PD #8-24 approved by Appleton Common Council action on \_\_\_\_\_, 20\_\_\_\_ and executed by the parties on the date of filing with the Calumet County Register of Deeds’ office is on file with the Appleton Community Development Department, 100 North Appleton Street, Appleton, WI, and is subject to review and reproduction by all interested parties upon request.

**Record and return copy to:**  
City of Appleton  
Community Development Department  
100 N. Appleton Street  
Appleton, WI 54911  
  
Parcels #31-9-1114-01 and #31-9-1114-00

3. **Subsequent Purchasers.** A Planned Development (PD) is a zoning overlay district under the City of Appleton Zoning Ordinance. The Implementation Plan Document exists for Planned Developments (PDs) under this zoning category and are covenants that run with the land. Accordingly, all future purchasers of property zoned PD should become familiarized with the individual requirements attached to that specific property.

4. **Amendments to the Recorded Development Plans and Implementation Plan Document.** Pursuant to Section 23-151 of the Appleton Municipal Code, major changes in a PD require approval by the City Council and subsequent recording of the amendment. The Community Development Director may approve Minor Amendments.

5. **Development Guidelines and Conditions.** The Development Guidelines and Conditions include, but are not limited to, the following:

A. **ALLOWED LAND USES**

1. Principal Permitted Land Uses. The land uses as listed below are allowed as principal uses in PD #8-24:

- *All of the principal permitted as listed in Zoning Code Section 23-113(b) for the C-2 General Commercial District, as now in effect or hereafter amended.*

2. Special Uses. The land uses as listed below are considered special uses in PD #8-24. Special uses shall follow the review procedures outlined in Zoning Code Section 23-66.

- *All of the special uses as listed in Zoning Code Section 23-113(e) for the C-2 General Commercial District, as now in effect or hereafter amended.*

3. In addition to the land uses allowed in the underlying district, the following land uses are consistent with the land use regulation exception criteria established by Appleton Municipal Code Section 23-151 and are allowed land uses in Schaefer Street PD #8-24:

- *NONE*

B. **DEVELOPMENT STANDARDS**

1. **Principal Permitted and Special Use Development Standards are as follows:**

- a. Minimum Lot Area: 14,000 square feet
- b. Maximum Lot Coverage: 90%, as was previously permitted
- c. Minimum Lot Width: 60 feet
- d. Minimum front yard building setback: 10 feet
- e. Minimum rear yard building setback: 10 feet, as was previously permitted
- f. Minimum side yard building setback: none, 10 feet if abutting a residentially zoned district
- g. Maximum building height: 35 feet (see Section 23-113(e))

2. **Accessory uses, building and structures** – All Accessory uses, buildings and structures shall comply with the development standards (front, rear and side yard setbacks, building height and

other requirements) of Chapter 23, Appleton Zoning Code as now in effect or hereafter amended.

3. **Off-Street Parking and Loading Standards** – All uses established, expanded, change in use shall provide off-street parking space(s), stacking space(s), bicycle spaces(s), and loading space(s) in accordance with the requirements of Chapter 23, Appleton Zoning Code as now in effect or hereafter amended unless customized standards are authorized or specifically identified as an ordinance exception. (See below)

***Off-Street Parking and Loading Standard Exceptions:***

All uses: Minimum off-street parking spaces required: one (1) space for each three hundred (300) square feet of gross floor area.

4. **Outdoor Lighting Standards** – All outdoor lighting shall comply with Chapter 23, Appleton Zoning Code as now in effect or hereafter amended.
5. **Landscaping Standards** – Landscaping improvements shall be required as part of any site plan. Landscaping shall conform with the requirements of the City’s Landscape Standards, including but not limited to, plantings around the parking/driveway areas, the dumpster enclosures, and the base of the ground signs. A detailed Landscape Plan shall be prepared and submitted to the Community Development Department as part of the Site Plan Review and approval process pursuant to Chapter 23, Appleton Zoning Code as now in effect or hereafter amended.
6. **Sign Standards** – All signs shall comply with the Chapter 23, Appleton Zoning Code as now in effect or hereafter amended.
7. **Maximum individual lot coverage** – shall be 90%
8. **Site Plan Review** Prior to obtaining a building permit within PD #8-24, minor site plan or site plan review and approval shall be required for principal, accessory buildings, structures and uses in accordance with Chapter 23, Appleton Zoning Code as now in effect or hereafter amended.
  - a. Site Plan #26-22 was approved by the Community Development Department on November 28, 2022. Buildings A and B in Exhibit B were included in the approved site plan.
9. **Application of the Municipal Code of the City of Appleton.** In conjunction with land uses and development provisions listed above, the Municipal Code of the City of Appleton as now in effect or hereafter amended applies to all land and land development on the property, unless otherwise stated in this document.

- C. **PLATTING REQUIREMENTS** – No person, firm or corporation shall combine lots, adjust lot lines, or divide any land within the jurisdictional limits of these regulations which results in a lot combination, lot line adjustment, subdivision, minor land division, or a replat as defined herein; no such lot combination, lot line adjustment, subdivision, minor land division, or replat, as defined herein shall be entitled to recording and no street shall be laid or public improvement made to land without compliance with all requirements of Chapter 17 of the Municipal Code.

D. **INSTALLATION OF REQUIRED IMPROVEMENTS** – The installation of all required improvements including but not limited to stormwater, streets, sidewalks, bike paths, water systems, sewer systems, fire protection, utilities shall be in accordance with all applicable City Appleton regulations.

E. **GENERAL PROVISIONS**

1. **Enforcement**

The provisions of the Planned Development designation and the development plan relating to the use of the land shall be effective and in force unless so amended as required by the Appleton Municipal Code Section 23-151.

2. **Breach of Provisions of PD #8-24**

If at any time any provision or requirements stated in the Planned Development designation have been breached by the Owner/Developer, the City may withhold approval of any or all platting or the issuance of any or all grading or building permits or occupancy permits applied for on the property, until such breach has been remedied.

3. **Binding Effect**

PD #8-24 shall run with the land and be binding upon the Owner/Developer, their respective successors, representatives and assigns, and all persons who may hereafter acquire an interest in the Property or any part thereof, with the exception that provisions of this designation may be modified through an amendment in accordance with the procedure stated in Chapter 23, Appleton Zoning Code as now in effect or hereafter amended to amend planned developments. This Implementation Plan Document for PD #8-24 and Exhibits (Exhibit A - Legal Description and Exhibit B - Concept Plan) shall be recorded in the Calumet County Register of Deeds Office in order to put prospective purchasers or other interested persons on notice as to the terms contained herein. Concept Plan is for illustrative purposes only. Locations and densities of contemplated Permitted Uses is subject to change.

4. **Entire Designation**

This designation contains all provisions and requirements incumbent upon the Owner/Developer relative to PD #8-24, except as modified by subsequent action of the Appleton Common Council in accordance with procedures set forth in the Appleton Municipal Code Section 23-151 to amend planned developments, and except that nothing contained herein shall be construed as waiving any requirements of the Appleton Municipal Code or other regulations otherwise applicable to the development of the Property.

5. **Recording of Development Plan and Implementation Plan Document (IPD)**

This designation must be signed by both the City and the Owner/Developer and must be recorded by the owner (Dean Kroening - KKREW Properties) in the Calumet County Register of Deeds' Office and a recorded copy of the Development Plan and Implementation Plan Document (IPD) shall be provided to the Community Development Department. This constitutes approval of the Development Plan and Implementation Plan Document (IPD), conditions applied, modifications and any density premiums, which may be granted, and exceptions, if any, to the plan shown in the application ordered by the Common Council.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, 2024.

By: \_\_\_\_\_  
Owner  
Title:

By: \_\_\_\_\_  
Owner  
Title:

STATE OF WISCONSIN )  
 )ss  
COUNTY OF \_\_\_\_\_ )

Personally came before me this \_\_\_\_\_ day of \_\_\_\_\_, 2024,  
the above named \_\_\_\_\_, and \_\_\_\_\_,  
to me known to be the persons who executed the foregoing instrument and  
acknowledged the same in the capacity and for the purposes therein intended.

\_\_\_\_\_  
Notary Public, State of Wisconsin  
My Commission expires \_\_\_\_\_

The above Implementation Plan for PD #8-24 was drafted by the undersigned at the  
request of the Property Owner.

\_\_\_\_\_  
Drafter's Signature  
Date: \_\_\_\_\_

Approved as to form:

\_\_\_\_\_  
Christopher R. Behrens  
Appleton City Attorney

CITY OF APPLETON, a Wisconsin  
Municipal Corporation

By: \_\_\_\_\_  
Jacob A. Woodford, Mayor

Attest: \_\_\_\_\_  
Kami Lynch, City Clerk

STATE OF WISCONSIN     )  
  )ss  
COUNTY OF \_\_\_\_\_ )

Personally came before me this \_\_\_\_\_ day of \_\_\_\_\_, 2024, the above-named Jacob A. Woodford, Mayor of City of Appleton, and Kami Lynch, City Clerk of City of Appleton, to me known to be the persons who executed the foregoing instrument and acknowledged the same in the capacity and for the purposes therein intended.

\_\_\_\_\_  
Notary Public, State of Wisconsin  
My Commission expires \_\_\_\_\_

DRAFT

**EXHIBIT A**

2111 S. Schaefer Street  
Parcel #31-9-1114-00

2121 & 2125 S. Schaefer Street  
Parcel #31-9-1114-01

**LEGAL DESCRIPTION:**

ALL OF LOT TWENTY (20) AND ALSO A PART OF LOT TWENTY-TWO (22), PURDY FARM PLAT, LOCATED IN THE NORTHEAST QUARTER (NE1/4) OF THE NORTHWEST QUARTER (NW1/4) OF SECTION FIVE (5), TOWNSHIP TWENTY (20) NORTH, RANGE EIGHTEEN (18) EAST, CITY OF APPLETON, CALUMET COUNTY, WISCONSIN, INCLUDING TO THE CENTER LINE OF THE ADJACENT PUBLIC RIGHT-OF-WAY, CONTAINING 45,434 SQUARE FEET (1.043 ACRES) OF LAND AND BEING DESCRIBED BY:

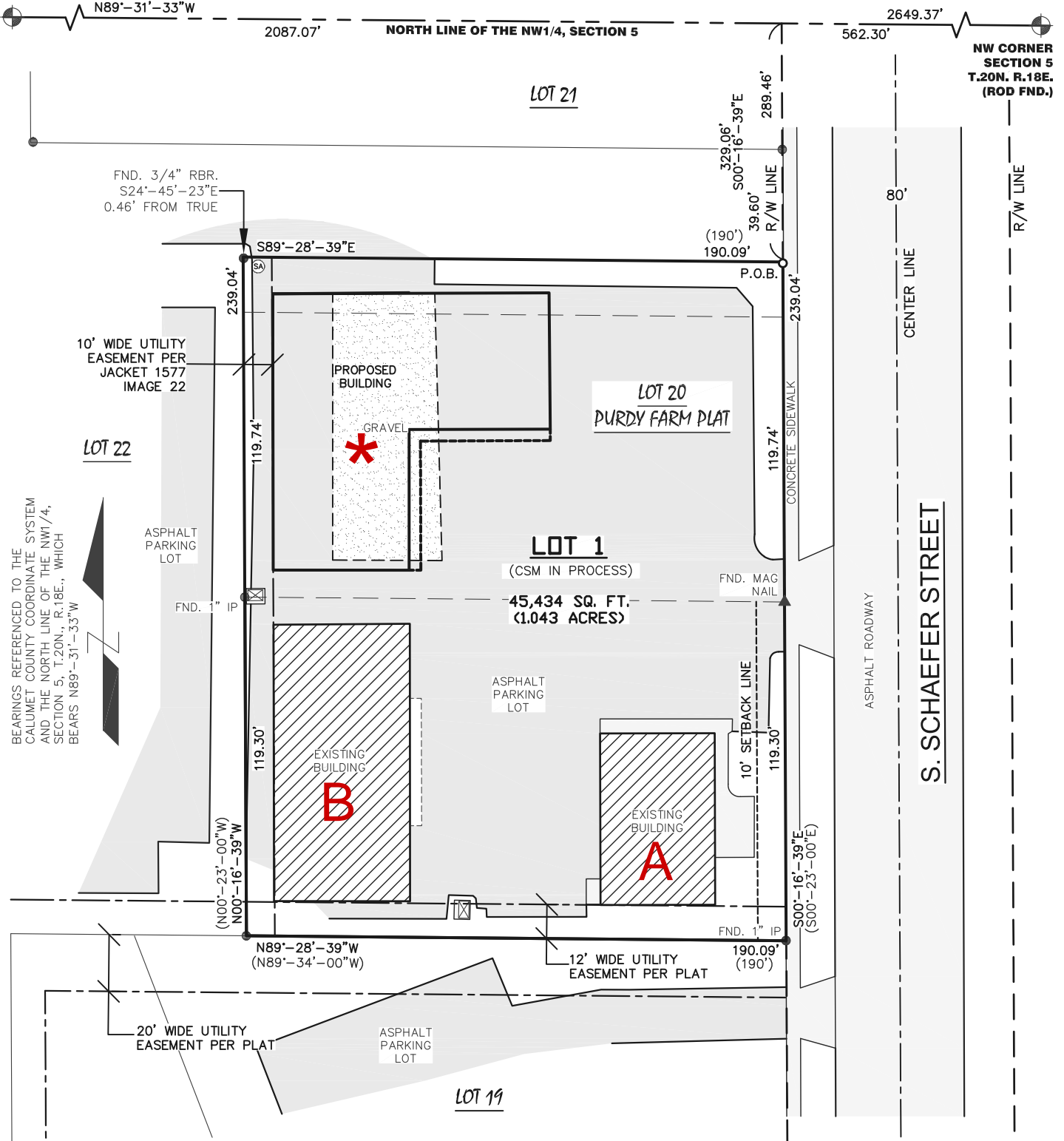
COMMENCING AT THE NORTHWEST CORNER OF SAID SECTION 5; THENCE N89°-31'-33"W 562.30 FEET ALONG THE NORTH LINE OF THE NW1/4 OF SAID SECTION 5 TO A POINT ON THE NORTHERLY EXTENSION OF THE WEST LINE OF S. SCHAEFFER STREET; THENCE S00°-16'-39"E 329.06 FEET ALONG SAID WEST LINE OF S. SCHAEFFER STREET AND ITS NORTHERLY EXTENSION TO THE POINT OF BEGINNING; THENCE CONTINUING S00°-16'-39"E 239.04 FEET ALONG SAID WEST LINE OF S. SCHAEFFER STREET TO THE SOUTHEAST CORNER OF SAID LOT 20; THENCE N89°-28'-39"W 190.09 FEET ALONG THE SOUTH LINE OF SAID LOT 20 TO THE SOUTHWEST CORNER THEREOF; THENCE N00°-16'-39"W 239.04 FEET ALONG THE WEST LINE OF SAID LOT 20 AND ITS NORTHERLY EXTENSION; THENCE S89°-28'-39"E 190.09 FEET TO THE POINT OF BEGINNING. BEING SUBJECT TO ANY AND ALL EASEMENTS AND RESTRICTIONS OF RECORD.

# EXHIBIT B

## CONCEPTUAL SITE IMPROVEMENT PLAN

ALL OF LOT 20 AND ALSO A PART OF LOT 22, PURDY FARM PLAT, LOCATED IN THE NE1/4 OF THE NW1/4, SECTION 5, T.20N., R.18E., CITY OF APPLETON, CALUMET COUNTY, WISCONSIN

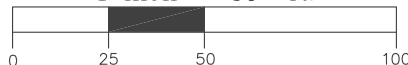
N1/4 CORNER  
SECTION 5  
T.20N. R.18E.  
(CHISELED X FND.)



### —LEGEND—

- = 1" X 24" IRON PIPE SET (1.130 LB./FT.)
- = 3/4" REBAR FOUND
- ⊙ = COUNTY MONUMENT FOUND
- ( ) = RECORDED INFORMATION
- ⊠ = ELECTRIC TRANSFORMER
- ⊗ = SANITARY MANHOLE

GRAPHIC SCALE  
1 inch = 50 ft.



**\*** Gravel to be replaced according to Demolition Permit B23-0141

**MERIDIAN**  
**SURVEYING, LLC**

N9637 Friendship Drive Office: 920-993-0881  
Kaukauna, WI 54130 Fax: 920-273-6037

DRAWN BY: J.B.  
CHECKED BY: S.C.D.  
JOB NO.: 15550

FIELD WORK DATE: 6-28-24  
FIELD BOOK: M-58, PG. 73  
SHEET 1 OF 4

SURVEYED FOR:  
KKREW PROPERTIES LLC.  
N4276 KILLARNEY LN.  
FREDOM, WI 54130





# CITY OF APPLETON

## MEMORANDUM

**Date:** August 28, 2024  
**To:** Plan Commission  
**From:** David Kress, Deputy Director of Community Development  
**Subject:** Annual Review of Business Improvement District (BID) Operating Plan

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## GENERAL INFORMATION

On behalf of Jennifer Stephany, Executive Director of Appleton Downtown Inc., please find the attached 2025 Business Improvement District (BID) Operating Plan for your review and recommendation.

Staff has reviewed the Operating Plan, and there are no BID boundary changes proposed. The annual BID map is included in Appendix F of the Operating Plan.

Page 9 of the Operating Plan identifies the parcels that are removed from or added to the schedule of assessments. Only BID contributing parcels are listed in the schedule of assessments (Appendix E). The language on page 8 clarifies how contributing versus non-contributing status is determined.

Business Improvement Districts are regulated by Section 66.1109 of the Wisconsin State Statutes. These Statutes require that a BID Operating Plan be reviewed and approved by the local legislative body on an annual basis. The Plan Commission is being asked to review and make recommendation to the Common Council in regard to the submitted 2025 Operating Plan.



**2025**  
**Downtown Appleton Business**  
**Improvement District Operating Plan**

# Downtown Appleton Business Improvement District Operating Plan 2025

## I. Preface

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

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

Pursuant to the BID Law, this shall be, when adopted, the 2025 Operating Plan for the Downtown Appleton Business Improvement District. This Operating Plan has been prepared by Appleton Downtown Incorporated (ADI) in partnership with the Business Improvement District Board of Directors and Appleton Downtown Board of Directors.

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

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

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

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

This Plan, when adopted by the City Council of the City of Appleton, after public hearing and recommendation of the Plan Commission in the manner required by the BID Law, shall govern the BID for the calendar year of 2025 which shall be the Twenty Second “Plan Year”. However, it is anticipated that the BID shall continue to be so successful that it will be renewed, upon essentially the same terms and conditions for subsequent years, each of which shall be the “Plan Year”. In the manner allowed under Section 66.1109 (3)(b) of the BID Law, although with changes to the budget, work plans and assessment Appendices.

## II. Plan Development

This shall be the Business Improvement District Operating Plan for the Downtown Appleton Business Improvement District, for the year 2025.

### A. Plan of Action

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

### B. Goals and Objectives

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

### C. Benefits

Money collected by the BID under this plan will be spent within the district or for the benefit of the district, and used to help property owners attract and retain tenants, keep downtown clean, safe and attractive, increase the value of property downtown and expand on a strong brand and marketing campaign for downtown. **Appendix A** outlines the goals and objectives for the plan year as they align with Chapter 14 Downtown Plan of the City of Appleton Comprehensive Plan. The plan is presented as a collaborative plan between the Business Improvement District, Appleton Downtown Inc. and Creative Downtown Appleton Inc. noted herein as: BID/ADI/CDA

#### D. 2023 Annual Report

##### **The 2023 annual report is attached.**

The Business Improvement District 206 properties underwent a reassessment in 2023 as part of the full city reassessment. The total assessed value of properties for the district in 2023 was \$174,395,400 representing an overall increase of 24.9% over the previous year.

The 2024 midyear update report is attached as **Appendix B**

#### E. 2025 Budget

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

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

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

#### F. Powers

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

1. To manage the affairs of the District.
2. To promote new investment and appreciation in value of existing investments in the District.
3. To contract with Appleton Downtown Incorporated on behalf of the BID to implement the Operational Plan.
4. To develop, advertise and promote the existing and potential benefits of the District.
5. To acquire, improve, lease and sell properties within the District, and otherwise deal in real estate.

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

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

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

H. Public Review Process

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

**I. District Boundaries** (no change has been made to this section from the previous year.)

The District is defined as those tax key parcels, which are outlined in blue and indicated by property in dark green on **Appendix F**, attached hereto and incorporated herein by this reference, reflecting the parcels as they existed in the City of Appleton Assessor's records as of June 2024.

The District is generally bounded on the south by the south right of way line of Lawrence Street, on the north by the north right of way line of Franklin Street, on the east by the right of way line of Drew Street and on the west by the west right of way line of Richmond Street/Memorial Drive, with additional corridors extending north on Richmond Street to Packard Street and west along college Avenue to Badger Avenue. Properties on both sides of boundary streets are included in the District. The District includes **202** contributing parcels and units. Notwithstanding the parcels of property which are not subject to general real estate taxes, shall be excluded from the District by definition, even though they lie within the boundaries of the BID as in the map in **Appendix F**.

See Section: VI. *Method of Assessment, Item A. Parcels Assessed*: For identification of parcels that are assessed for the BID as contributing parcels based on their use and parcels that are non-contributing. Annual adjustments to contributing and non-contributing parcels in the BID are made based on parcel combinations and parcel divisions.

**I. Organization** (no change has been made to this section from the previous year.)

A. Operating Board

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

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

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

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

9. For purposes of this section “person” means an individual owner of a parcel, or a representative of an entity owner of such parcel. No one individual, and no more than one representative of any entity, may hold more than one Board position. If, during the course of a term, a Board member’s situation changes, so that they no longer fit the definition for that seat, such as by selling their parcel, they shall resign within 10 days of selling their parcel.

B. Amendments

This Operating Plan, when adopted, shall be the governing plan for the Plan Year 2025. However, section 66.1109 (3) (b) of the BID Law requires the Board of the city to annually review and make changes as appropriate to the district Plan, when adopting a new Operating Plan for later Plan Years. Approval by the City’s Common Council of such Plan updates shall be conclusive evidence of compliance of such Plan with the BID Law.

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

1. A joint strategy session of the BID Board and the ADI Board of Directors will develop the objectives of the Operational Plan for the next Plan Year. Hosted 6/12/2024.
2. The proposed Goals and Objectives for the Plan Year will be drafted by Appleton downtown Incorporated Staff and submitted to the ADI and BID Board for review and input.
3. The BID Board will review the proposed BID Plan and submit to Planning Commission for approval. Hosted 7/10/2024
4. ADI Staff will submit the plan draft it to the ADI Board for review. 7/23/2024
5. The proposed plan will be submitted to the Community Development Department. Submitted on 8/07/2024
6. The Planning Commission and Common Council will act on the proposed BID Operational Plan as scheduled.
7. The Mayor of Appleton will appoint new members to the BID Board at least 30 days prior to the expiration of outgoing Board members’ terms.

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

**II. Finance Method** (no change has been made to this section from the previous year.)

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

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

**III. Method of Assessment**

**Special Note:** There was no change to the BID assessment rate or methodology.



A. Parcels Assessed – Appendix E

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

Real property used exclusively for residential purposes may not be assessed, as required by the BID Law. Property exempt from paying real estate taxes, parcels classified as ‘vacant’ use by the City of Appleton Assessors records or owned by government agencies will not be assessed.

For identification of parcels that are assessed for the BID as contributing parcels based on their use and parcels that are non-contributing. Annual adjustments to contributing and non-contributing parcels in the BID are made based on parcel combinations and parcel divisions.

The Business Improvement District reassessment was completed by the City of Appleton Assessor’s Office. The current property assessment list was generated by the Assessor’s office and reviewed by the Finance Department, ADI staff and the BID Board.

B. Levy of Assessments

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

The BID Board of Directors approved BID rate for the 2025 plan year is \$2.75 per \$1000 of assessed value, minimum \$275 and maximum \$5500.

The 2025 plan year assessment list **Appendix E** shows the calculation with the current rate at \$2.75 for each \$1000 of assessed value for each parcel in the District with no parcel assessed more than \$5,500 and no parcel assessed less than \$275, with parcels used solely for parking excluded, with parcels solely used for residences excluded, and with the adjustments for the Commercial Condominiums and adjustments for relocation of the caps and minimums. The assessment was based on the assessed value of that parcel (land and improvements) as shown in the records of the City Assessor’s Office except as otherwise identified below. It is understood that some properties within the BID may be re-assessed. The changes in the tax assessment may impact the BID assessment for these properties.

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

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

C. Schedule of Assessments

The final form of this 2025 Operating Plan has attached as **Appendix E** are schedules of all the tax key numbers within the BID which are being assessed, and their assessment using this formula. A review and adjustments have been made by the City of Appleton Assessor and BID Board of Directors

- BID properties increased in value by \$8,458,100 (4.85%) over previous year.
- The 2025 BID levy continues as \$2.75/\$1000 with a maximum assessment of \$5500 and a minimum assessment of \$275
- Based on this methodology, the 2025 BID assessments are anticipated to generate: \$275,896
- Current carry over value approved as designated within the 2025 budget is \$4000
- Undesignated carry over funds: \$24,978
- Adjustments from previous year presented by the City Assessor include:

**REMOVED PARCELS:**

- Tax Key: 31-2-0273-05
- Tax Key: 31-2-0273-06
- Tax Key: 31-2-0007-00
- Tax Key: 31-2-0282-07
- Tax Key: 31-2-0282-08

**ADDED PARCELS:**

- Tax Key: 31-2-0290-02



D. Assessment Collection and Dispersal (no change in this section from previous year)

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

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

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

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

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

The BID Board shall prepare and make available to the public and the City Council annual reports describing the current status of the BID, including expenditures and revenues, at the time it submits its amended Plan to the City for the following year. Following the end of the fiscal year an independent certified audit shall be obtained by the Board, and which shall be paid for out of the BID Budget. Copies of the 2022 audit are available in the ADI office and a copy was submitted to the Community Development Department with this plan.

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

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

E. Annual Report

The Board shall prepare an annual report as required by section 66.1109 (3) (c) of the Wisconsin Statutes. A copy of the 2023 report is attached.

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

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

**IV. City Role** (no change has been made to this section from the previous year.)

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

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

**V. Required Statements** (no change has been made to this section from the previous year.)

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

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

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

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

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

A. Appleton Downtown Incorporated

The BID shall be a separate entity from Appleton Downtown Incorporated (ADI). ADI shall remain a private not-for-profit organization, not subject to the open meeting law, and not subject to the public records law except for its records generated in connection with its contract with the BID Board, and may, and it is intended, shall contract with the BID to provide services to the BID in accordance with the Plan. Any contracting with ADI to provide services to BID shall be exempt from the requirements of sec. 62.15, Wis. Stats., because such contracts shall not be for the construction of improvements or provision of materials. If the BID does contract for the construction of improvements or provisions of material, it shall follow the requirements of such statutes to the extent applicable to assure open, competitive procurement of contracts and purchases. Further, the annual accounting required under 66.1109 (3) (c) Wis. Stats. shall be deemed to fulfill the requirement of 62.15 (14) Wis. Stats. Ownership of assets of Appleton Downtown Incorporated shall remain solely with Appleton Downtown Incorporated.

A. Binding Clause

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

**VI. Severability and Expansion (no change has been made to this section from the previous year.)**

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

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

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

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

All appendices are hereby incorporated by this reference.

**APPENDIX A**  
**DOWNTOWN**  
**2025**  
**Plan of Work**

# BUSINESS IMPROVEMENT DISTRICT 2025 Plan of Work

## **Mission**

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

## **Our Shared Vision:**

Downtown Appleton will be a thriving, inclusive heart of the region, where people, culture, and commerce flourish. We envision a dynamic urban center characterized by vibrant public spaces, diverse businesses, and a strong sense of community. By prioritizing accessibility, inclusion and a commitment to quality of life, Downtown Appleton will be a destination of choice for residents, visitors, and businesses.

## **BID Goals and Objectives:**

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

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

1. Create a safe, welcoming, inclusive and accessible downtown
2. Invest in the growth of downtown neighborhoods with diverse housing options and residential amenities
3. Support the launch and growth of unique, independent businesses
4. Grow downtown as the employment center for the region
5. Fully embrace and leverage the diverse arts, cultural, and educational assets of the community
6. Foster a culture of walking and biking supported by public transportation
7. Support diverse partnerships which make downtown more attractive for residents and visitors through: activities and events; public art and place making; on-going maintenance; and promotion and marketing



8. Continue to support events and entertainment which safely draw visitors to downtown Appleton
9. Collaborate with community partners to increasing leisure travel and sports tournament travelers to Appleton and maximize the value of the Fox Cities Exhibition Center
10. Increase connectivity, trails, and recreation opportunities between the downtown, the Fox River, and the region
11. Promote quality development along the Fox River by embracing the region's industrial and natural heritage

**Downtown Community Priorities:**

- A strong local economy that supports businesses of all sizes, in all sectors
- An inclusive and welcoming downtown that encourages belonging
- Build downtown as a destination for leisure and business travel
- Strong livable Downtown neighborhoods with a variety of housing stock
- Improved traffic safety and walkability through improved streetscape elements
- Improved connectivity to the Riverfront
- Accessible and affordable parking solutions
- Expanding access to public art & creative culture
- Strengthened partnership with Lawrence University and Appleton Area School District

## **2025 BID/ADI/CDA Work Plan**

The ADI, CDA and BID boards will continue to advance the four imperatives for advancing Downtown's mission and community priorities:

1. Play an integral role in business retention and recruitment efforts to maintain an occupancy rate of 80% or greater.
2. Promote Downtown living options and curate livability enhancements to attract residents.
3. Collaborate with our community partners to cultivate downtown as a robust visitor destination.
4. Increase communication and interaction with downtown business owners to encourage more engagement and cross promotion.

The BID work Plan is aligned with the initiatives outlined in the City of Appleton Downtown Plan. The plan is presented as a collaborative plan incorporating efforts by the Business Improvement District, Appleton Downtown Inc and Creative Downtown Appleton Inc.

**DRAFT STRATEGIC WORK PLAN 2025:  
APPLETON DOWNTOWN INC., The BUSINESS IMPROVEMENT DISTRICT  
and CREATIVE DOWNTOWN APPLETON INC**

## **Downtown Management**

**Goal:** To ensure ADI, BID and CDA collaboratively support the sustainability of a dynamic center for business, leisure, and community engagement, securing its long-term success.

### **Objectives:**

- **Image Marketing Strategy:** Develop an annual comprehensive image marketing strategy to attract investment, tourism, and residents. This will include social media campaigns, targeted advertising, maintaining a user friendly up to date website and promotional events.
- **Inclusive Community Engagement:**
  - **Stakeholder Communication:** Sustain ongoing communication and engagement with stakeholders, including businesses, residents, and community organizations, to ensure alignment with their needs and interests.
  - **Youth Advisory Board:** Establish a Youth Advisory Board, including Lawrence University students, to ensure the voices and perspectives of young people are incorporated into downtown planning and development.
  - **Stakeholder Engagement Opportunities:** Create diverse opportunities for stakeholders to provide input, participate in decision-making processes, and contribute to the ongoing vibrancy of Downtown Appleton.
- **Clean, Safe and Friendly Downtown Experience:**
  - **Cleaning & Maintenance:** Manage cleaning and maintenance program to ensure a clean, safe, and visually appealing downtown environment.
  - **Advocate for Solution-Based Programs Serving the Unhoused:** Partner with social service organizations to advocate for and support comprehensive solutions addressing the needs of the unhoused population downtown.
- **Resource Sustainability:**
  - **Resource Development Strategy:** Develop a comprehensive strategy for diversifying revenue streams to support future growth and development of the organization.
  - **Investment & Sponsorship Relations:** Cultivate strong relationships with potential investors and sponsors to secure financial resources for ongoing programs and events. Including a new category for downtown residents to support our work.

## Downtown Neighborhood & Residential Development

**Goal:** To attract new residents by creating a desirable and livable downtown environment. We will achieve this by supporting development of high-quality housing options, fostering a strong sense of community, and attracting businesses that cater to the needs of residents.

### Objectives:

- **Enhance Residential Development:**
  - Facilitate the Appleton Town Makers series to encourage the creation of a mix of housing options, including apartments, condominiums, and townhomes.
  - Host a development summit to showcase opportunities within the district
- **Cultivate a Thriving Neighborhood:**
  - Develop and implement a robust neighborhood engagement program that fosters a sense of community among residents including:
    - Pet-friendly initiatives, such as dog parks and waste disposal stations.
    - Events and activities that promote neighbor networking and social interaction.
    - Launch an “In my Neighborhood” campaign to encourage resident support of local businesses.
  - Recruit businesses that support residential development, such as:
    - Grocery store or smaller format markets to meet residents' daily needs.
    - Local retail, coffee shops, restaurants, and other amenities.
- **Promote a Healthy Lifestyle:**
  - Collaborate with community organizations to promote healthy living initiatives.

## Downtown Mobility and Parking Initiatives

**Goal:** Establish a Mobility and Parking task force dedicated to an enhancement plan that improves accessibility, safety, and convenience for all users, encouraging a variety of travel modes to access Downtown Appleton.

### Objectives:

- **Increase Accessibility:**
  - Encourage pedestrian infrastructure improvements, prioritizing crossing safety for pedestrians and cyclists.
  - Improve wayfinding signage to ensure clear and easy navigation throughout Downtown.
- **Expand Mobility Options:**
  - Establish a micromobility promotion for proper trail, scooter and bike use
  - Continue the partner and promotion role for the downtown trolley to support connected mobility between the riverfront and downtown.
  - Promote walkability by creating a pedestrian-friendly environment for all users
- **Optimize Parking options:**
  - Advocate to maintain low parking rates to encourage visitors and support economic development.
  - Promote the use of the Passport Parking App for a convenient and contactless parking experience.

## Downtown Development and Business Retention

**Goal:** To cultivate a thriving downtown ecosystem that fosters the success of existing businesses and attracts high-quality new ventures, creating a dynamic and prosperous central business district.

### Objectives:

- **Business Retention:**

- Re-launch a "Business to Business" program connecting service-based businesses within the downtown, creating a network for mutual support and growth.
- Conduct a comprehensive "Business Challenges and Opportunities Survey" to understand the current needs and aspirations of existing downtown businesses.

- **Business Attraction:**

- Develop a data-driven strategy to attract desirable new and innovative businesses that complement the existing downtown ecosystem.
- Foster a culture of entrepreneurship in collaboration with economic development partners such as WWBIC, WEDC, WHEDA, SBA, Fox Cities Chamber of Commerce, Fox Valley Tech.
- Increase regular communication with property owners and real estate representatives to improve the tracking system for available downtown properties, ensuring accurate and up-to-date information for potential tenants.
- Manage the Business Recruitment grant program to support diverse economic growth in downtown

- **Downtown Development:**

- Host the "Appleton Town Makers" program providing resources and mentorship to cultivate new developers and local entrepreneurs.
- Manage the Facade Improvement grant program to enhance the total value of the BID properties and support properly branded businesses.

## Downtown Tourism, Arts, Entertainment & Education

**Goal:** To develop and promote a diverse range of cultural attractions, events and experiences that enrich the lives of residence and draw visitors to Downtown, creating a lasting impression and fostering economic growth.

### Objectives:

- **Cultivate a Vibrant Cultural Landscape:**
  - Host a calendar of annual events that cater to a variety of interests and demographics.
  - Utilize data-driven metrics from the CVB to evaluate and improve the effectiveness of annual events and promotions.
  - Curate public art installations that enhance the visual appeal of Downtown, including projection mapping displays.
  - Collaborate with district educational community partners to develop programming for businesses and local residence
- **Elevate the Visitor Experience:**
  - Partner with the Convention and Visitors Bureau (CVB) to create unique visitor experiences during the NFL Draft.
  - Implement initiatives that enhance the overall visitor experience, including improved signage, accessible amenities, and engaging programming.
- **Grow Visitor Spending:**
  - Develop unique visitor tour experiences targeting various demographics and themes.
  - Utilize technology to promote real time incentives for shopping, dining and entertainment to visitors such as web push notifications.

## Downtown Urban Form and Design in Public Spaces

**Goal:** Transform Downtown's public spaces into inviting and functional areas that enhance user experience, promote exploration, and contribute to a distinct downtown identity.

### Objectives:

- **Improved Wayfinding:**
  - Upgrade sidewalk kiosks to guide visitors and residents through the Downtown core.
  - Leverage digital platforms for interactive wayfinding experiences.
  - Explore a perpendicular storefront signage program
  - Establish a plan for new creative district markers that visually define the boundaries of Downtown Appleton.
- **Beautification, Lighting and Public Art Projects:**
  - Implement and sustain beautification projects throughout the Downtown area, incorporating greenery, lighting and public art installations
  - Organize the chalk walk public art competition and installation
  - Support Sculpture Valley rotating art exhibits to maintain dynamic appeal and showcase diverse artistic voices.
- **Functional Spaces:**
  - Continue to add flexible seating options throughout the district.
  - Influence approval for additional refuse containers in high traffic areas.
  - Revisit the investment of a solar powered charging station in Downtown.

# **Appendix B**

## **2024 Mid-year report**

## 2024 BID/ADI/CDA: Mid-year Review

**Please note:** Within the UPDATE column are additional notes that may include a future opportunity or a challenge in this area. This document was used at the BID, ADI, CDA Board retreat

Mobility and Parking policies and projects to provide convenient access to the downtown for all modes of travel.			
Current work plan tasks	UPDATE	Primary staff	% of time
Draft a Downtown Pedestrian Enhancement Plan as part of the Smart Streets Appleton initiative: including signage, sidewalk seating and lighting, kiosks, planters, winter ice and snow accumulation monitoring, weekend sidewalk garbage solutions, adopt a planter program. Seek new partners and supporters	<p>Lane Configuration session and discussion on 6 month report: -48% crashes, meter revenue up 16%, travel time dropped to 30mph from 32, increase time to travel across 30 seconds. The 12 month report will include traffic count numbers as well.</p> <p>Walk Audit with AARP WI – 17 participants including city departments, AARP, Easter Seals, business owners, Appleton Visually Impaired Support Group, Post Crescent, City alderperson, BID Board President</p> <p>DPW partnership on kiosk update. With Dani leaving DPW we may need to wait longer. I have asked if we could take the lead on this project.</p> <p><b>Opportunity:</b> recruit a community based volunteer team to help move this work forward. Seeking a volunteer task force chair. Also an opportunity to engage LU students</p>	Jen – primary	<p>Jen 7.5%</p> <p>Abby 5%</p> <p>Carissa</p> <p>Meg – 5%</p> <p>Meghan</p> <p>Sandy</p>
Promote the Passport parking app, meter options and permit information through social media channels and website in partnership with the City of Appleton	<b>Opportunity:</b> to work into our marketing efforts, website and create new social media content to promote the parking options	Abby/Meg - primary	
Continue a partner role in supporting and promoting the downtown trolley	<p>Valley Transit continues to invest in running the trolley. We received a CVB support grant for \$10,000 for 2024</p> <p><b>Opportunity</b> to expand district transportation</p>	Jen - primary	
Recruit and promote experiential instructional classes for public transportation and bike lane use engage our partners at Valley Transit and the bike federation	<p>Nothing new to report.</p> <p><b>Challenge:</b> capacity, time, and resource</p>		

**Tourism, Arts, Entertainment & Education** policies and projects to develop cultural attractions and promote travel to the downtown.

Current work plan tasks	UPDATE	Primary staff	% of time
<p>Host annual events: Farm Market, Heid Music Concert Series, Death by Chocolate, Soup Walk, spring and fall Craft Beer Walks, Spring Fashion Show, Fall Shop Sip and Stroll, Summer beverage stroll and Chalk Walk, Mini Golf on the Town, Cultural Cuisine Walk, Avenue of Ice, 2 Light the Night Markets + holiday edition</p>	<p>Event tracking: 1<sup>st</sup> quarter</p> <ul style="list-style-type: none"> <li>• DBC tickets: 648 / 20 businesses participating</li> <li>• Annual meeting attendance 112</li> <li>• Fashion show: 177 / 10 businesses participating</li> <li>• Ice carvings 33</li> <li>• Pop up markets: 24 vendors / 13 host locations</li> <li>• Café Walk tickets: 375 / 8 businesses participating</li> <li>• Leap Local: 31 businesses participating</li> <li>• Mini Golf on the Town      Review: 69 teams / 276 players / 15 businesses participated</li> <li>• Press Conference      Facebook: 50+ watching live</li> <li>• Cultural Cuisine Walk April 27: Sold 313 / goal was 300 / 10 businesses participating</li> <li>• Craft Beer Walk May 11: Sold 330 / 12 businesses participating</li> <li>• Light the Night Market May 17: highly attended event, surveys are still open:</li> <li>• Summer Beverage Stroll 63 tickets sold / 10 businesses participated</li> <li>• Night Market July 19th event</li> <li>• Memorial Day Parade May 27 attendance was up over previous years</li> <li>• Farm Market June 1 – Oct. 12</li> <li>• Concerts June 6 – August 29 No July 4th event</li> <li>• Flag Day Parade June 8      All Set</li> <li>• Street Music Week June 10-15: 11:30am – 1pm</li> <li>• Make Music Day June 21</li> </ul> <p>Still waiting on what City of Appleton special event fee structure will look like for 2025 and beyond. We anticipate being required to establish our own safety and security team.</p> <p><b>Opportunity:</b> event evaluation reports. Use surveying and geofencing technology to gain data on event visitors and economic impact</p>	<p>Carissa – primary</p> <p>Sandy – primary</p> <p>Meghan Abby Meg Jen</p> <p>Volunteer team</p>	<p>Jen 20%</p> <p>Abby 15%</p> <p>Carissa 80%</p> <p>Meg – 10%</p> <p>Meghan 30%</p> <p>Sandy 80%</p>



<p>Partner with Community organizations to co-host or support events and programs:</p>	<p>Rhythms of the World, Mile of Music, Heid Music’s Street Music Week, Fox Cities Chamber of Commerce Octoberfest, City of Appleton parades,</p> <p><b>Opportunity:</b> take over Rhythms of the World – we have been approached to do this – answer has been no at this time, more engagement in Mile of Music, or Irish Fest</p>	<p>Carissa - primary Sandy - primary Meghan 30% Abby/Meg Jen Volunteers</p>	
<p>Maintain the Visitor Area kiosk within our office</p>	<p>We added door stops to be better able to keep our door propped open when groups are in the hotel. Small things can make a difference.</p> <p><b>Opportunity:</b> add weekend hours to staff the office on Saturdays for visitors</p>	<p>Meg - primary</p>	
<p>Engage as an active community partner to advance downtown’s role in the Tourism Master Plan</p>	<p>Music venue research underway with CVB. Jennifer is part of the team. Consultants spent three days doing site visits and interviews. Results expected later this summer</p> <p><b>Opportunity:</b> more involvement with CVB committees and projects as they surface – Abby and Meg are more involved with marketing opportunities</p>	<p>Jen – primary</p>	
<p>Curate one large scale public art project within the downtown or riverfront</p>	<p>Paint the City project on the YMCA this year – fundraising is behind and the project is tentative as we await grant award updates.</p> <p><b>Opportunity:</b> City DPW has approached ADI about additional traffic control box wraps in the district – funding will need to be found to complete</p>	<p>Jen – primary Meghan</p>	
<p>Collaborate with Lawrence University clubs and organizations to include student activities and engagement in our event planning and committees.</p>	<p>ADI attended two meet and greet student events this quarter. Distributing downtown guides and sign ups for our weekly Eblast. We engaged an LU student team for Night Market to aid in clean up. Looking for additional ways to engage students that are around this summer</p> <p><b>Opportunity:</b> Create an LU advisory board or include in a Youth advisory board to create a stronger connection and engage students in program and event planning</p>	<p>Carissa Jen</p>	

<b>Neighborhood &amp; Residential Development</b> policies and projects to foster new residential development and create healthy neighborhoods surrounding the downtown.			
<b>Current work plan tasks</b>	<b>UPDATE</b>	<b>Primary staff</b>	<b>% of time</b>
<p>Launch a Neighborhood Engagement Initiative: update the Downtown Welcome packet, create a “Downtown living Guide” page on our website. Form a committee to help create and update content for the website and Facebook page. Host Downtown resident meet and greets twice a year. Establish &amp; share a one step reporting process for non-emergency issues</p>	<p>Current packets are being used up before we revamp – no new work here</p> <p>The new website navigation will include a downtown living section. In process</p> <p>We hosted our first meet and greet with residents. We had 12 attendees from Avant, Zuelke and Park Central. We received great feedback on amenities and businesses that would improve livability. We will host quarterly - another meet up this summer</p> <p><b>Opportunity:</b> to grow the Downtown Neighborhood involvement through the structured City group and Facebook group</p>	<p>Jen - primary Abby/Meg</p>	<p>Jen 15%</p> <p>Abby 10%</p> <p>Carissa</p> <p>Meg – 30%</p> <p>Meghan</p> <p>Sandy</p>
<p>Launch a Pet Friendly plan for Downtown: including installation of waste stations, a pet watering station, exercise equipment, explore pet friendly days at the Farm Market, as well as work toward a proposal for a downtown dog recreation area within downtown. Coordinate a fundraising effort to finance the improvements</p>	<p>Pet friendly survey – over 2600 responses – strong interested in adding amenities for pets and owners downtown. Mild interest in adding a dog exercise area. Mild interest in pet friendly events – also concerns about pet friendly events.</p> <p>Consideration for Pet friendly farm market days for at the end of season stretch of 3-4 weeks.</p> <p>Discussion with Park and Rec on added pet friendly amenities in Houdini. They will support if we raise the dollars.</p> <p>Exploration on pet recreation area at 208 s State st. – property is no longer available. Park and Rec has a new park development fund that could be a potential funding source.</p> <p><b>Opportunity:</b> A plan will come together for all of the above – timeframe will depend on staff capacity and ability to raise funds</p>	<p>Jen - primary Meg/Abby – on survey and promo</p> <p>Volunteer coordination</p>	

Pursue business recruitment for residential amenities: grocery store, retail, nail salon, experience businesses, dry cleaners, more restaurants	Incremental Developer ecosystem program launching in July – Jen is the coordinator to manage the monthly meetings – including invitations, location and minutes.  <b>Challenge:</b> capacity, time, and resource	Jen - primary	
Work with the City on pedestrian improvements as part of the Smart Streets Appleton initiative see also #5 Ped. Plan	May 29 <sup>th</sup> Walk Audit with AARP WI, Smart Streets, City Health Dept. Age friendly network. 17 in attendance  <b>Opportunity:</b> a findings report will be compiled and shared with City staff. Some of the suggestions also include low cost improvements like paint highlights on sidewalks in high traffic areas on Richmond, flag crossing program at Appleton St. This work will continue.	Jen – primary Abby/Meg	

<b>Downtown Development &amp; Business Retention</b> policies and projects to support existing businesses in the downtown and to attract desirable new ones.			
<b>Current work plan tasks</b>	<b>UPDATE</b>	<b>Primary staff</b>	<b>% of time</b>
Hire a part time position to enhance the economic development activities to manage more effectively the economic development committee, the grant programs, and an active business recruitment campaign. Conduct retention visits with ADI staff and Board be a liaison for new businesses moving into downtown, assist developers, landlords, monitor properties and available space.	Unfortunately, the ADI budget did not allow for the additional position to be hired. We were able to extend hours for current employees to assist with marketing, website project, committee work, event support.  Jennifer’s role with economic development work continues to expand. Including incremental developer ecosystem program  <b>Challenge:</b> Funding. This is still a future option to grow our capacity with a staff member focused on either economic development or the special projects work to free up time for Jennifer to expand into this area	Jen – primary	Jen 20% Abby 5% Carissa Meg 10% Meghan 5%
Collaborate with the City of Appleton Community Development Department to host a state of the downtown event	No new discussion – with Matt leaving we currently do not have a city rep on the Board. Once that is reestablished – we will work on that opportunity.  <b>Challenge:</b> We need the City to partner with us and they are currently under staffed. Definite potential to host a developer tour and session and/or full state of downtown later in the year. Also have interest from local real estate and construction partners to co-host	Jen – primary	Sandy 5%

Cooperatively market the City TIF and ARA grant programs	We continue to cross promote.  <b>Opportunity:</b> more promotion of the program to our BID members – the new website will do this but a direct mail piece is another option.	Jen Abby	
Manage and promote the Gift Certificate Program	<b>Opportunity:</b> expand promotion of the gift certificate program direct to companies with summer intern programs, also as employee incentive gifts, holiday gifts	Meg - primary	
Manage and promote the Business recruitment grant program	Business recruitment grants slow start to the year. New recruitment piece, video and website coming soon!  <b>Opportunity:</b> Entrepreneurship/mentor program with community partners to support start up business in downtown	Jen – primary	
Conduct business visits with ADI staff. Include Board members on occasion	Ongoing work, more time needed to set up one on one meetings.  <b>Opportunity:</b> Set schedule for visits each month (I did this last year and included Chamber and City to join me) Revisit the ambassador program concept with past and current Board Members helping with meetings  <b>Challenge:</b> capacity and time	Jen – primary	
Promote the Lawrence University internship program to downtown business and foster a collaborative connection with the business major faculty and students. Promote the LU student discount program to businesses to grow participation.	We are in discussion with LU about a Work Study employee for the summer season. The federal program pays 50% of wages to qualifying organizations. We will also help to promote intern programs for downtown businesses to participate in.  <b>Challenge:</b> capacity, time, and resource	Jen – primary	
Host Business to Business programs and networking opportunities for downtown business owners quarterly	B2B was scheduled and promoted for April 5 <sup>th</sup> with J. Geiger Consulting – no registration and had to cancel  <b>Opportunity:</b> create shareable videos or establish a pod cast for members <b>Challenge:</b> capacity, time, and resource	Abby/Meg  Jen	

<b>Downtown Management</b> policies and programs to ensure that resources are available to continue to advance the vitality of downtown. <b>Organizational Management</b>			
<b>Current work plan tasks</b>	<b>UPDATE</b>	<b>Primary staff</b>	<b>% of time</b>
Manage the cooperative agreement between the BID, ADI and CDA and explore an organizational restructuring to increase our capacity	We are working on a full workload document to outline our annual projects. Collectively we are drafting work plans and process plans to better document and track our progress.	Jen - primary	Jen 25% Abby 60%
Utilizing the new Image Marketing Strategy: establish, invest and execute an Annual Image Marketing Plan of tactics and programs to promote, shopping, dining, attractions, employment, living in one great place!	The image marketing campaign is in process: Image Marketing committee meets 6/13 to review website and other updates  <b>Opportunities:</b> future image marketing investments are identified in the strategic plan	Abby/Meg - primary	Carissa 10% Meg – 40%
Invest in a website upgrade for: AppletonDowntown.org	An RFP was executed and downtown business Coalesce was selected. The project is well underway. Finalizing the homepage in the next two weeks and the site map. Draft site to be shared at Image Marketing meeting 6/13 Many improvements: directory, calendar, member resources, living, new business resources etc...	Abby/Meg - primary	Meghan 70% Sandy 15%
Promote Downtown Watch engagement and communication through a tips line to APD. Establish and share a one step reporting process for non-emergency issues and damage	No new work on the tips line at this time –  <b>Challenge:</b> capacity, time, and resource		
Communicate Weekly to our members with the Eblast system and Manage the social media network for business members to connect and share resources	Weekly Eblast: member and public: Converted to Constant Contact and revamped the layout.  <b>Opportunity:</b> expand out public Eblast list and work on ways to increase member readership	Abby/Meg primary	
Host monthly committee meetings: Image Marketing Retail, Hospitality, Washington Square Economic Development, quarterly BID Board meetings, monthly ADI Board, quarterly CDA Board	Committee work is ongoing and requires the full team to manage from notices, agenda, minutes, follow ups, chair meetings, etc...  <b>Opportunity:</b> incremental development ecosystem meeting will be added. add a youth advisory committee this fall.	Abby Carissa Sandy Jen	

Manage maintenance contracts and oversee project needs to enhance the cleanliness of the district. Include an annual sidewalk power washing of sidewalks. Draft and new maintenance agreement between the City of Appleton and the BID.	<p>Pfefferle contract and Riverview gardens contract are in motion. We continue to monitor graffiti as it is reported and execute clean up within appropriate time.</p> <p>Sidewalk power washing will be scheduled next this summer.</p> <p><b>Opportunity:</b> launch the reporting system with J Geiger – the new DPW director will need to be in place as reports will go direct to their department staff and APD</p>	Jen – primary	
Sponsorship recruitment and relationship management , Grant writing Expand the membership structure as an investment support structure with greater reach to regional businesses that are looking to enhance workforce attractiveness of the Fox Cities	<p>The One Great Place campaign with CDA did well out of the gates - but now stalled – working on video testimonials for another support push this summer</p> <p>Lillians fundraiser \$600</p> <p>Sponsorship goal : \$339,275 of our \$346,000 goal</p> <p><b>Opportunity:</b> grow general membership/investment support. Cultivate the materials and a campaign to approach local employers</p>	Meghan – primary	

Urban Form & Design policies and projects to create an identity and improve the appearance of downtown.			
Current work plan tasks	UPDATE	Primary staff	% of time
Launch an adopt a tree planter program that engages new partners to enhance the annual planter flowers or planter area lighting and Houdini Fountain area.	<p>Since we are unable to add additional plants - We are exploring a lighting enhancement option with uplighting LED spots or twinkle lights.</p> <p><b>Opportunity</b> – add more flowers in other areas around Houdini, explore hanging baskets on side streets</p>	Jen - primary	Jen 7.5% Abby 5%
Manage and promote the Façade Improvement grant program	<p>Jan – May grants below</p> <p><b>Opportunity</b> – establish a large-scale development grant \$50,000 or other amount: through fundraising, grants etc... Establish an incentive package for a grocery store</p>	Jen - primary	Carissa Meg Meghan
Work with DPW to update the graphics and information in the sidewalk kiosks and wayfinding signage	Offered to DPW to help coordinate the meetings to start the kiosk insert update work. suggesting QR code use. Digital sign interest – pricing is beyond city budget	Jen – primary Abby	Sandy

	<b>Challenge:</b> We have made another ask to see if we could take lead on the project. Waiting on an ask for a meeting to establish a process		
Street pole banner replacement as needed	6 more banners were ordered for replacement they are at DPW and a request for west end replacement has been sent	Jen - primary	

**Public Spaces & Riverfront** strategies for enhancing the public realm to support strong neighborhoods and the growth of Appleton's tourism industry, while also strengthening connections between downtown and the riverfront.

Current work plan tasks	UPDATE	Primary staff	% of time
Draft and implement a Houdini Plaza Enhancement Plan: such as: bring back the plastic lawn chairs, explore a proposal for a sound system to play music in Houdini Plaza during the daytime hours, curate a program schedule with community partners, add dog amenities	<p>Pursuing wooden Adirondack chairs, a water fountain and plantings along the back of the fountain. Lyssa King will take the lead on applying for a Downtown neighborhood grant to help support</p> <p>A wellness series will be hosted in Houdini during Farm Market mid June through August. Sponsored by AARP WI</p> <p><b>Opportunity:</b> sound system in Houdini, dog amenities like exercise play equipment or a dog water add on to the water fountain</p>	<p>Jen – primary</p> <p>Carissa – primary</p>	<p>Jen – 5%</p> <p>Abby</p> <p>Carissa 10%</p> <p>Meg – 5%</p> <p>Meghan</p>
Assist the riverfront businesses coordinate a Trot the Fox type event: music, food, activities at stops along the Trail – ideally connected it to an existing downtown event.	<b>Challenge :</b> capacity, time, and resource to create an event plan for riverfront businesses to execute		Sandy
Install and maintain the parklet in a new location to be determined in the spring	<p>The parklet was installed on Washington St. again.</p> <p>Help is needed to keep plants watered and the space clean</p> <p><b>Opportunity:</b> host free coffee day or cookie break day at the parklet, maybe partner with ATW and offer downtown employees ice cream bars. Add a dog leash hook up. A shade canopy would also be great!</p>	<p>Jen – primary</p> <p>Meg</p> <p>Volunteers</p>	

## Façade Grants 2024

Applicant/tenant	Address	MSC	Paid	Grant request	\$45,000 Balance
J. Kippa Law LLC	133 E College Ave Façade major renovation grant	MSC Steve and Michael to approve with final breakdown of project cost from Corcoran Glass. Abstain Ryan	X	5000	40,000
J Kippa Law LLC	133 E College Ave Minor grant	Steve and Michael to approve Abstain Ryan	X	2500	37,500
J Kippa Law LLC	133 E College Ave Access Grant	MSC Matt and Steve to approve with final breakdown of project cost from Corcoran Glass. Abstain Ryan	X	2500	35,000
The Bar on the Avenue	427 W. College Ave	MSC Michael and Ryan to approve	X	1996	33,004
The Coop	400 Richmond St. STE G	MSC Ryan and Eric Max 50/50 on final invoice	X	692	30,650
Ototo Ramen	205 N. Richmond St	MSC Steve and Teresa to approve	X	1662	31,342
The 513	513 W College Ave	MSC Deb and Eric to approve Teresa Abstain.		2500	28,150
215 W College	General Store	MSC Tim/Teresa to approve	X	264	27,886
10 E College Ave	Fox Commons/ Dark Horse	MSC Eric/Walter to approve		5000	22,886
519 W. College	Déjà vu Martini Lounge and Monkey Bar	MSC Tim/Steve to approve		2500	20,386

## Recruitment Grants 2024

Applicant	Address	MSC	paid	Grant request	15,000 Balance
Ototo Ramen	205 N Richmond St	MSC Steve and Michael to approve	X	1000	14,000
Rabbit Holes Counseling, LLC	513 W College Ave	MSC Steve and Tim to approve Abstain Teresa	X	975	13,025
The Coop	400 Richmond St STE G	MSC Ryan and Teresa	X	1000	12,025



# **APPENDIX C**

**2025**

**Budget**

# BUSINESS IMPROVEMENT DISTRICT PROPOSED 2025 BUDGET

<b>REVENUE</b>		<b>2025 Budget</b>
	BID Assessments	275,896
	Designated carryover	4,000
	Undesignated carryover	24,978
	<b>Total</b>	<b>304,874</b>
<b>EXPENSES</b>		
Contracted Services		
	ADI Staff support	55,000
Administrative	Supplies and operational services	6,496
BID Audit/Accounting		3,400
Marketing	Image marketing, graphic design, content creation	100,000
Economic Development		
	Façade Grants	45,000
	Recruitment Grant	15,000
	Business Recruitment	15,000
Maintenance services	Sidewalk cleaning, flowers, lights	40,000
Undesignated carryover		24,978
		<b>304,874</b>

# APPENDIX D

## 2024-2025 BID Board List

<b>Board Member</b>	<b>Business</b>	<b>Category</b>
David Kress	City of Appleton – Deputy Director Community Development Department	City Government
Benjamin King	King Brokerage	Property owner / Business Owner –office/ Downtown Resident
Brad Schwebs	NAI Pfefferle/Pfefferle Management	Property owner representative / Office
Gary Schmitz – President	Retired	
Walter Schonfeld	Downtown Property Owner	Property and Business Owner – office
Bill Wetzel - Secretary	Acoca Coffee	Property Owner / Business Owner Hospitality
Jason Druxman– Treasurer	Avenue Jewelers	Business Owner: Retail & property/co-owner
Tim Ceman	Noble Assets	Property Owner
Nate Weyenberg	Angels Forever Windows of Light	Property Owner / Business Owner: Retail

# **Appendix E**

## **Schedule of Assessments (attached)**

Parcel ID	St Number	Pre Direction	Street Name & Way	Owner First Name	Owner Middle Name	Owner Last Name	Condo % Ownership		Land Assessed Value	Building Assessed Value	Total Assessed Value	Assessment		
								Unit#				Assessment	Min/Max Adj	Total Assessment
312000200	303	E	COLLEGE AVE			WP & R INC			\$165,200	\$182,500	\$347,700	956.18	956.18	956.18
312000300	305	E	COLLEGE AVE			GO TO COLLEGE LLC			\$69,500	\$110,000	\$179,500	493.63	493.63	493.63
312000400	311	E	COLLEGE AVE			311 COLLEGE AVE LLC			\$54,500	\$141,500	\$196,000	539.00	539.00	539.00
312001700	231	E	COLLEGE AVE			FURMAN PROPERTIES LLC			\$87,200	\$360,500	\$447,700	1,231.18	1,231.18	1,231.18
312001900	229	E	COLLEGE AVE			NOBLE ASSETS LLC			\$35,500	\$114,000	\$149,500	411.13	411.13	411.13
312002000	227	E	COLLEGE AVE			FIFTY-ONE FIFTY LLC			\$39,700	\$158,000	\$197,700	543.68	543.68	543.68
312002100	225	E	COLLEGE AVE	WENDY		KRUEGER ET AL			\$41,500	\$120,000	\$161,500	444.13	444.13	444.13
312002200	223	E	COLLEGE AVE			223 COLLEGE LLC			\$75,900	\$162,000	\$237,900	654.23	654.23	654.23
312002300	219	E	COLLEGE AVE			219 COLLEGE LLC			\$75,900	\$84,000	\$159,900	439.73	439.73	439.73
312002500	217	E	COLLEGE AVE	ANTHONY	A	MUELLER			\$75,900	\$140,000	\$215,900	593.73	593.73	593.73
312002600	215	E	COLLEGE AVE			KORN ACQUISITIONS R.E. LLC			\$76,200	\$254,300	\$330,500	908.88	908.88	908.88
312002700	213	E	COLLEGE AVE			SHIRAZ HOLDINGS LLC			\$78,400	\$189,500	\$267,900	736.73	736.73	736.73
312003100	201	E	COLLEGE AVE			GABRIEL LOFTS LLC			\$381,300	\$4,279,500	\$4,660,800	12,817.20	5,500.00	5,500.00
312003800	101	E	COLLEGE AVE			BEHNKE PROPERTIES LLC			\$47,300	\$237,700	\$285,000	783.75	783.75	783.75
312003900	103	E	COLLEGE AVE			FA & VB LLC			\$145,200	\$403,800	\$549,000	1,509.75	1,509.75	1,509.75
312004000	107	E	COLLEGE AVE	RAYMON	L	ASPLUND			\$60,500	\$163,000	\$223,500	614.63	614.63	614.63
312004100	109	E	COLLEGE AVE			DKS REALTY WISCONSIN IV LLC			\$67,000	\$154,000	\$221,000	607.75	607.75	607.75
312004200	111	E	COLLEGE AVE			DKS REALTY WISCONSIN IV LLC			\$67,000	\$154,500	\$221,500	609.13	609.13	609.13
312004300	113	E	COLLEGE AVE			BEHNKE PROPERTIES LLC			\$69,600	\$175,000	\$244,600	672.65	672.65	672.65
312004400	115	E	COLLEGE AVE			BEHNKE PROPERTIES LLC			\$187,400	\$517,000	\$704,400	1,937.10	1,937.10	1,937.10
312004600	121	E	COLLEGE AVE			BEHNKE PROPERTIES LLC			\$58,600	\$142,000	\$200,600	551.65	551.65	551.65
312004700	123	E	COLLEGE AVE			ECO PROPERTIES LLC			\$56,700	\$157,000	\$213,700	587.68	587.68	587.68
312004800	125	E	COLLEGE AVE			SOMA CORPORATION			\$60,000	\$295,000	\$355,000	976.25	976.25	976.25
312004900	127	E	COLLEGE AVE			BEHNKE PROPERTIES LLC			\$74,200	\$163,500	\$237,700	653.68	653.68	653.68
312005000	129	E	COLLEGE AVE			BEHNKE PROPERTIES LLC			\$74,200	\$231,500	\$305,700	840.68	840.68	840.68
312005100	133	E	COLLEGE AVE			GREENSIDE PROPERTIES LLC			\$74,200	\$393,500	\$467,700	1,286.18	1,286.18	1,286.18
312005101	135	E	COLLEGE AVE			GREENSIDE PROPERTIES LLC			\$77,200	\$150,500	\$227,700	626.18	626.18	626.18
312006900	107	W	COLLEGE AVE			BAZIL PROPERTIES LLC			\$108,100	\$378,500	\$486,600	1,338.15	1,338.15	1,338.15
312007000	101	W	COLLEGE AVE			ZUELKE FLATS LLC			\$171,000	\$9,625,000	\$9,796,000	26,939.00	5,500.00	5,500.00
312007200	100	W	LAWRENCE ST			100 W LAWRENCE STREET FEE LLC			\$526,800	\$9,500,000	\$10,026,800	27,573.70	5,500.00	5,500.00
312007400	221	W	COLLEGE AVE			SHAH BECK GROUP LLC			\$583,500	\$2,626,000	\$3,209,500	8,826.13	5,500.00	5,500.00
312007800	215	W	COLLEGE AVE			PASSION8 LLC			\$118,100	\$286,500	\$404,600	1,112.65	1,112.65	1,112.65
312007900	211	W	COLLEGE AVE			KING BROKERAGE LTD			\$175,400	\$625,600	\$801,000	2,202.75	2,202.75	2,202.75
312008000	207	W	COLLEGE AVE			TUSLER PROPERTIES LLC			\$87,600	\$299,000	\$386,600	1,063.15	1,063.15	1,063.15
312008100	205	W	COLLEGE AVE	STEVEN		HECKENLAIBLE LIV TRUST			\$51,900	\$231,800	\$283,700	780.18	780.18	780.18

312008200	203	W	COLLEGE AVE			CLEO'S REAL ESTATE PARTNERSHIP			\$53,000	\$305,500	\$358,500	985.88	985.88	985.88
312008300	201	W	COLLEGE AVE			VOYAGEURS 201 LLC			\$63,100	\$447,500	\$510,600	1,404.15	1,404.15	1,404.15
312008400	117	S	APPLETON ST			THEOBALD-APPLETON RENTAL PROPERTY LLC			\$24,200	\$136,800	\$161,000	442.75	442.75	442.75
312009200	343	W	COLLEGE AVE			DURTY PROPERTIES LLC			\$61,100	\$124,400	\$185,500	510.13	510.13	510.13
312009201	345	W	COLLEGE AVE			ANDREWZKI HOLDINGS LLC			\$50,200	\$137,500	\$187,700	516.18	516.18	516.18
312009500	333	W	COLLEGE AVE			333 COLLEGE LEASED FEE LLC	21.00%		\$356,600	\$2,900,000	\$3,256,600	8,955.65	5,500.00	1,155.00
312009600	333	W	COLLEGE AVE			333 COLLEGE LEASED FEE LLC	79.00%		\$2,220,300	\$11,150,000	\$13,370,300	36,768.33	5,500.00	4,345.00
312023300	125	N	SUPERIOR ST			FOX CITIES CHAMBER OF COMMERCE			\$184,300	\$562,700	\$747,000	2,054.25	2,054.25	2,054.25
312023500	342	W	COLLEGE AVE			HVN COMMERCIAL HOLDINGS LLC			\$435,300	\$1,645,500	\$2,080,800	5,722.20	5,500.00	5,500.00
312023800	330	W	COLLEGE AVE			330 COLLEGE LLC			\$382,200	\$2,015,300	\$2,397,500	6,593.13	5,500.00	5,500.00
312024200	322	W	COLLEGE AVE			DOUGHLICIOUS REAL ESTATE HOLDINGS LLC			\$127,000	\$248,500	\$375,500	1,032.63	1,032.63	1,032.63
312024300	318	W	COLLEGE AVE			318 COLLEGE AVE LLC			\$384,200	\$7,440,000	\$7,824,200	21,516.55	5,500.00	5,500.00
312024800	310	W	COLLEGE AVE	NATHAN	S	WEYENBERG			\$63,600	\$121,000	\$184,600	507.65	507.65	507.65
312025000	300	W	COLLEGE AVE			FOX CITIES HOTEL INVESTORS LLC			\$372,500	\$6,618,300	\$6,990,800	19,224.70	5,500.00	5,500.00
312025300	131	N	APPLETON ST			LOFGREN PROPERTIES 6 LLC ET AL			\$385,600	\$151,000	\$536,600	1,475.65	1,475.65	1,475.65
312025700	222	W	COLLEGE AVE			USV 222 LLC			\$610,500	\$12,300,000	\$12,910,500	35,503.88	5,500.00	5,500.00
312026000	210	W	COLLEGE AVE			PATTEN PROPERTIES LLC			\$173,000	\$706,800	\$879,800	2,419.45	2,419.45	2,419.45
312026300	200	W	COLLEGE AVE			LOFGREN PROPERTIES 6 LLC ET AL			\$355,300	\$1,750,400	\$2,105,700	5,790.68	5,500.00	5,500.00
312027303	100	W	COLLEGE AVE			NKHH LLC	1.30%	50B	\$7,300	\$100	\$7,400	20.35	275.00	71.50
312027304	100	W	COLLEGE AVE			NKHH LLC	8.00%	50C	\$4,500	\$100	\$4,600	12.65	275.00	440.00
312027309	100	W	COLLEGE AVE			NKHH LLC	0.20%	50H	\$1,100	\$2,900	\$4,000	11.00	275.00	11.00
312027330	100	W	COLLEGE AVE			NKHH LLC	15.90%	300A	\$89,700	\$1,173,400	\$1,263,100	3,473.53	3,473.53	874.50
312027340	100	W	COLLEGE AVE			NKHH LLC	15.90%	400A	\$89,700	\$1,178,200	\$1,267,900	3,486.73	3,486.73	874.50
312027341	100	W	COLLEGE AVE			NKHH LLC	0.10%	400B	\$600	\$4,400	\$5,000	13.75	275.00	5.50
312027342	100	W	COLLEGE AVE			NKHH LLC	0.10%	400C	\$600	\$6,900	\$7,500	20.63	275.00	5.50
312028200	122	E	COLLEGE AVE			PFEFFERLE INVESTMENTS INC ET	34.00%	001	\$514,200	\$602,000	\$1,116,200	3,069.55	3,069.55	1,870.00
312028201	122	E	COLLEGE AVE			PFEFFERLE INVESTMENTS INC ET	0.17%	002	\$2,600	\$400	\$3,000	8.25	275.00	9.35
312028202	122	E	COLLEGE AVE			APPLETON EDUCATION FOUNDATI	9.42%	101	\$142,500	\$770,000	\$912,500	2,509.38	2,509.38	518.10
312028203	122	E	COLLEGE AVE			WASHINGTON STREET R.E. INVES	0.54%	102	\$8,200	\$19,500	\$27,700	76.18	275.00	29.70
312028204	122	E	COLLEGE AVE			APPLETON EDUCATION FOUNDATI	0.93%	103	\$14,100	\$71,600	\$85,700	235.68	275.00	51.15
312028205	122	E	COLLEGE AVE			SS HOFFMAN HOLDINGS LLC	0.58%	104	\$8,800	\$19,000	\$27,800	76.45	275.00	31.90
312028206	122	E	COLLEGE AVE			APPLETON EDUCATION FOUNDATI	6.68%	105	\$0	\$658,000	\$658,000	1,809.50	1,809.50	367.40
312028210	122	E	COLLEGE AVE			PFEFFERLE INVESTMENTS INC ET	18.52%	204	\$280,100	\$2,182,500	\$2,462,600	6,772.15	5,500.00	1,018.60
312028211	122	E	COLLEGE AVE			PFEFFERLE INVESTMENTS INC ET	0.26%	205	\$3,900	\$400	\$4,300	11.83	275.00	14.30
312028212	122	E	COLLEGE AVE			PFEFFERLE INVESTMENTS INC ET	0.27%	206	\$4,100	\$17,600	\$21,700	59.68	275.00	14.85
312028213	122	E	COLLEGE AVE			WASHINGTON STREET R.E. INVES	3.45%	301	\$52,200	\$345,500	\$397,700	1,093.68	1,093.68	189.75
312028214	122	E	COLLEGE AVE			WASHINGTON STREET R.E. INVES	3.11%	106	\$47,000	\$491,000	\$538,000	1,479.50	1,479.50	171.05
312028215	122	E	COLLEGE AVE			SS HOFFMAN HOLDINGS LLC	7.90%	107	\$119,500	\$698,000	\$817,500	2,248.13	2,248.13	434.50

312028700	100	E	COLLEGE AVE			Y&T PROPERTIES LLC			\$72,400	\$253,500	\$325,900	896.23	896.23	896.23
312029001	10	E	COLLEGE AVE			FOX COMMONS PROPERTIES LLC			\$1,078,000	\$775,400	\$1,853,400	5,096.85	5,096.85	5,096.85
312029002	10	E	COLLEGE AVE			MOSAIC FAMILY HEALTH INC			\$297,700	\$214,200	\$511,900	1,407.73	1,407.73	1,407.73
312030200	130	N	MORRISON ST			DAUNTLESS PROPERTIES LLC			\$30,500	\$143,000	\$173,500	477.13	477.13	477.13
312030300	120	N	MORRISON ST			MORRISON BUILDING LLC			\$131,200	\$526,500	\$657,700	1,808.68	1,808.68	1,808.68
312031100	129	N	DURKEE ST			229 WASHINGTON LLC			\$93,700	\$260,000	\$353,700	972.68	972.68	972.68
312031200	200	E	COLLEGE AVE			200 COLLEGE LLC			\$129,200	\$628,500	\$757,700	2,083.68	2,083.68	2,083.68
312031300	204	E	COLLEGE AVE			FA & VB LLC			\$124,500	\$571,000	\$695,500	1,912.63	1,912.63	1,912.63
312031500	208	E	COLLEGE AVE			TENNIE'S JEWELRY PROPERTIES LLC			\$60,700	\$118,000	\$178,700	491.43	491.43	491.43
312031600	212	E	COLLEGE AVE	BRADLEY	R	VANDINTER			\$63,500	\$123,300	\$186,800	513.70	513.70	513.70
312031700	216	E	COLLEGE AVE			214/216 COLLEGE LLC			\$124,200	\$383,500	\$507,700	1,396.18	1,396.18	1,396.18
312031900	218	E	COLLEGE AVE			218220 COLLEGE LLC			\$120,100	\$348,500	\$468,600	1,288.65	1,288.65	1,288.65
312032100	222	E	COLLEGE AVE			222 E COLLEGE AVE LLC			\$59,400	\$290,500	\$349,900	962.23	962.23	962.23
312032200	224	E	COLLEGE AVE			TROOPER PROPERTIES LLC			\$101,600	\$490,000	\$591,600	1,626.90	1,626.90	1,626.90
312032300	230	E	COLLEGE AVE			CJW PROPERTIES LLC			\$87,100	\$153,500	\$240,600	661.65	661.65	661.65
312032400	232	E	COLLEGE AVE			CJW PROPERTIES LLC			\$76,900	\$191,000	\$267,900	736.73	736.73	736.73
312032500	109	N	DURKEE ST			CJW PROPERTIES LLC			\$12,600	\$100,000	\$112,600	309.65	309.65	309.65
312033300	323	E	WASHINGTON ST			LAWRENCE UNIVERSITY OF WISCONSIN			\$319,400	\$30,500	\$349,900	962.23	962.23	962.23
312033400	331	E	WASHINGTON ST			DMW INVESTMENTS LLC			\$75,000	\$200,500	\$275,500	757.63	757.63	757.63
312033700	300	E	COLLEGE AVE			BGO LLC			\$250,400	\$195,500	\$445,900	1,226.23	1,226.23	1,226.23
312034000	308	E	COLLEGE AVE			BGO LLC			\$124,500	\$247,000	\$371,500	1,021.63	1,021.63	1,021.63
312034200	314	E	COLLEGE AVE			BOMB ALLEY LLC			\$61,900	\$144,000	\$205,900	566.23	566.23	566.23
312034300	320	E	COLLEGE AVE			320 EAST COLLEGE LLC			\$234,900	\$9,800,000	\$10,034,900	27,595.98	5,500.00	5,500.00
312035300	200	N	DURKEE ST			FIRSTAR BANK APPLETON			\$620,500	\$1,100,000	\$1,720,500	4,731.38	4,731.38	4,731.38
312036300	230	N	MORRISON ST			OPTION L PROPERTIES LLC			\$139,600	\$271,000	\$410,600	1,129.15	1,129.15	1,129.15
312036600	200	E	WASHINGTON ST			SKY APPLETON LLC ET AL			\$888,000	\$8,100,000	\$8,988,000	24,717.00	5,500.00	5,500.00
312037100	229	E	FRANKLIN ST			DETWEILER PROPERTIES LLC			\$75,500	\$198,000	\$273,500	752.13	752.13	752.13
312040400	231	W	FRANKLIN ST			APPLETON HISTORICAL SOCIETY INC			\$176,800	\$213,200	\$390,000	1,072.50	1,072.50	1,072.50
312040500	214	N	SUPERIOR ST			214 SUPERIOR LLC			\$21,500	\$181,000	\$202,500	556.88	556.88	556.88
312040800	233	N	APPLETON ST			THE HISTORIC CORNERSTONE LLC			\$114,500	\$143,000	\$257,500	708.13	708.13	708.13
312041700	211	N	APPLETON ST			VINTAGE-SPECIALTY PROPERTIES LLC			\$33,000	\$157,500	\$190,500	523.88	523.88	523.88
312041800	207	N	APPLETON ST			APOLLON PROPERTIES LLC			\$40,300	\$233,000	\$273,300	751.58	751.58	751.58
312043006	218	N	DIVISION ST	ROBERT	E	HOERSCH			\$80,000	\$172,000	\$252,000	693.00	693.00	693.00
312043600	300	N	APPLETON ST			FITZGERALD PROPERTIES LLC			\$75,000	\$365,000	\$440,000	1,210.00	1,210.00	1,210.00
312045800	130	E	FRANKLIN ST			FOX VALLEY LITERACY INC			\$46,200	\$289,500	\$335,700	923.18	923.18	923.18
313084700	201	S	WALNUT ST			MIP LLC			\$106,600	\$358,000	\$464,600	1,277.65	1,277.65	1,277.65
313084900	211	S	WALNUT ST			NOBLE ASSETS LLC			\$32,400	\$168,500	\$200,900	552.48	552.48	552.48
313085500	516	W	EIGHTH ST			NORWEST BANK WISCONSIN APPLETON			\$352,500	\$165,300	\$517,800	1,423.95	1,423.95	1,423.95

313087600	206	S	MEMORIAL DR			MSV ENTERPRISE LLC			\$63,900	\$186,000	\$249,900	687.23	687.23	687.23
313087700	625	W	LAWRENCE ST			920 HOME PRO LLC			\$41,700	\$72,900	\$114,600	315.15	315.15	315.15
313087800	621	W	LAWRENCE ST			MB HOMES LLC			\$58,900	\$229,000	\$287,900	791.73	791.73	791.73
313087900	617	W	LAWRENCE ST			BEHNKE PROPERTIES LLC			\$52,400	\$45,600	\$98,000	269.50	275.00	275.00
313088300	215	S	MEMORIAL DR			DECLEENE-ZELLNER LLC			\$162,600	\$478,300	\$640,900	1,762.48	1,762.48	1,762.48
313093400	131	S	BADGER AVE	JAMES	M	BOYLE SURVIVOR'S TRUST			\$90,400	\$45,600	\$136,000	374.00	374.00	374.00
313093700	911	W	COLLEGE AVE			S & K FOOD MART INC			\$159,800	\$330,000	\$489,800	1,346.95	1,346.95	1,346.95
313093800	843	W	COLLEGE AVE	LANCE	L	NEVINS REV TRUST			\$151,600	\$351,000	\$502,600	1,382.15	1,382.15	1,382.15
313094300	823	W	COLLEGE AVE			BLOCK 800 LLC			\$147,300	\$5,396,000	\$5,543,300	15,244.08	5,500.00	5,500.00
313094400	819	W	COLLEGE AVE	SARA	K	PIERRI REV TRUST			\$35,900	\$134,000	\$169,900	467.23	467.23	467.23
313094500	815	W	COLLEGE AVE	SARA	K	PIERRI REV TRUST			\$56,500	\$227,000	\$283,500	779.63	779.63	779.63
313094501	813	W	COLLEGE AVE	SARA	K	PIERRI REV TRUST			\$29,700	\$80,500	\$110,200	303.05	303.05	303.05
313094600	809	W	COLLEGE AVE			PIONEER PROFESSIONAL CARPET CARE LLC			\$28,700	\$133,500	\$162,200	446.05	446.05	446.05
313094700	807	W	COLLEGE AVE			OUTPOST 31 LLC			\$28,700	\$131,700	\$160,400	441.10	441.10	441.10
313094800	801	W	COLLEGE AVE			TERRELL PROPERTIES LLC			\$57,500	\$275,000	\$332,500	914.38	914.38	914.38
313096000	745	W	COLLEGE AVE			PACIFIC HOLDINGS LLC			\$36,400	\$348,000	\$384,400	1,057.10	1,057.10	1,057.10
313096100	741	W	COLLEGE AVE			I KNOW, RIGHT? LLC			\$66,600	\$50,000	\$116,600	320.65	320.65	320.65
313096301	733	W	COLLEGE AVE			SPATS FOOD AND SPIRITS LLC			\$84,000	\$167,500	\$251,500	691.63	691.63	691.63
313096400	719	W	COLLEGE AVE	JENNY KONG		YU			\$114,100	\$185,300	\$299,400	823.35	823.35	823.35
313097200	127	S	MEMORIAL DR			ZCF QOZB LLC			\$353,900	\$1,412,000	\$1,765,900	4,856.23	4,856.23	4,856.23
313097600	623	W	COLLEGE AVE			GENIA'S LEGACY LLC			\$86,800	\$240,000	\$326,800	898.70	898.70	898.70
313097601	104	S	MEMORIAL DR	MAI		VANG			\$121,500	\$117,000	\$238,500	655.88	655.88	655.88
313097900	609	W	COLLEGE AVE			APPLETON WEST END REALTY LTD			\$249,000	\$360,000	\$609,000	1,674.75	1,674.75	1,674.75
313098300	603	W	COLLEGE AVE			DAS VENTURES HOLDINGS LLC			\$141,200	\$579,500	\$720,700	1,981.93	1,981.93	1,981.93
313098500	601	W	COLLEGE AVE	JAMES		LISON			\$54,000	\$297,500	\$351,500	966.63	966.63	966.63
313098600	115	S	STATE ST			MCFLESHMAN'S COMMONS LLC			\$74,000	\$539,000	\$613,000	1,685.75	1,685.75	1,685.75
313098800	121	S	STATE ST			121 STATE ST LLC			\$103,800	\$151,000	\$254,800	700.70	700.70	700.70
313099300	620	W	LAWRENCE ST			RUBY LOU PROPERTIES LLC			\$75,900	\$200,000	\$275,900	758.73	758.73	758.73
313099600	122	S	MEMORIAL DR			2026 WISCONSIN AVE LLC ET AL			\$205,000	\$160,500	\$365,500	1,005.13	1,005.13	1,005.13
313099800	613	W	COLLEGE AVE			RUBY LOU PROPERTIES LLC			\$40,000	\$75,500	\$115,500	317.63	317.63	317.63
313099900	535	W	COLLEGE AVE	JOHN	C	GREINER			\$62,900	\$210,000	\$272,900	750.48	750.48	750.48
313100300	523	W	COLLEGE AVE			EFS LLC			\$299,700	\$848,000	\$1,147,700	3,156.18	3,156.18	3,156.18
313100400	519	W	COLLEGE AVE			KOROLL PROPERTIES LLC			\$94,900	\$355,000	\$449,900	1,237.23	1,237.23	1,237.23
313100500	513	W	COLLEGE AVE			BELA DEVELOPMENT LLC			\$154,900	\$1,600,000	\$1,754,900	4,825.98	4,825.98	4,825.98
313100600	516	W	LAWRENCE ST			BELA DEVELOPMENT LLC			\$117,500	\$18,000	\$135,500	372.63	372.63	372.63
313100800	118	S	STATE ST			NORWEST BANK WISCONSIN APPLETON			\$383,000	\$970,000	\$1,353,000	3,720.75	3,720.75	3,720.75
313101500	510	W	LAWRENCE ST	CRESENCIO		VICTORIA			\$30,300	\$64,600	\$94,900	260.98	275.00	275.00
313101700	119	S	WALNUT ST			IMPERIAL ASSETS LLC			\$89,400	\$126,500	\$215,900	593.73	593.73	593.73

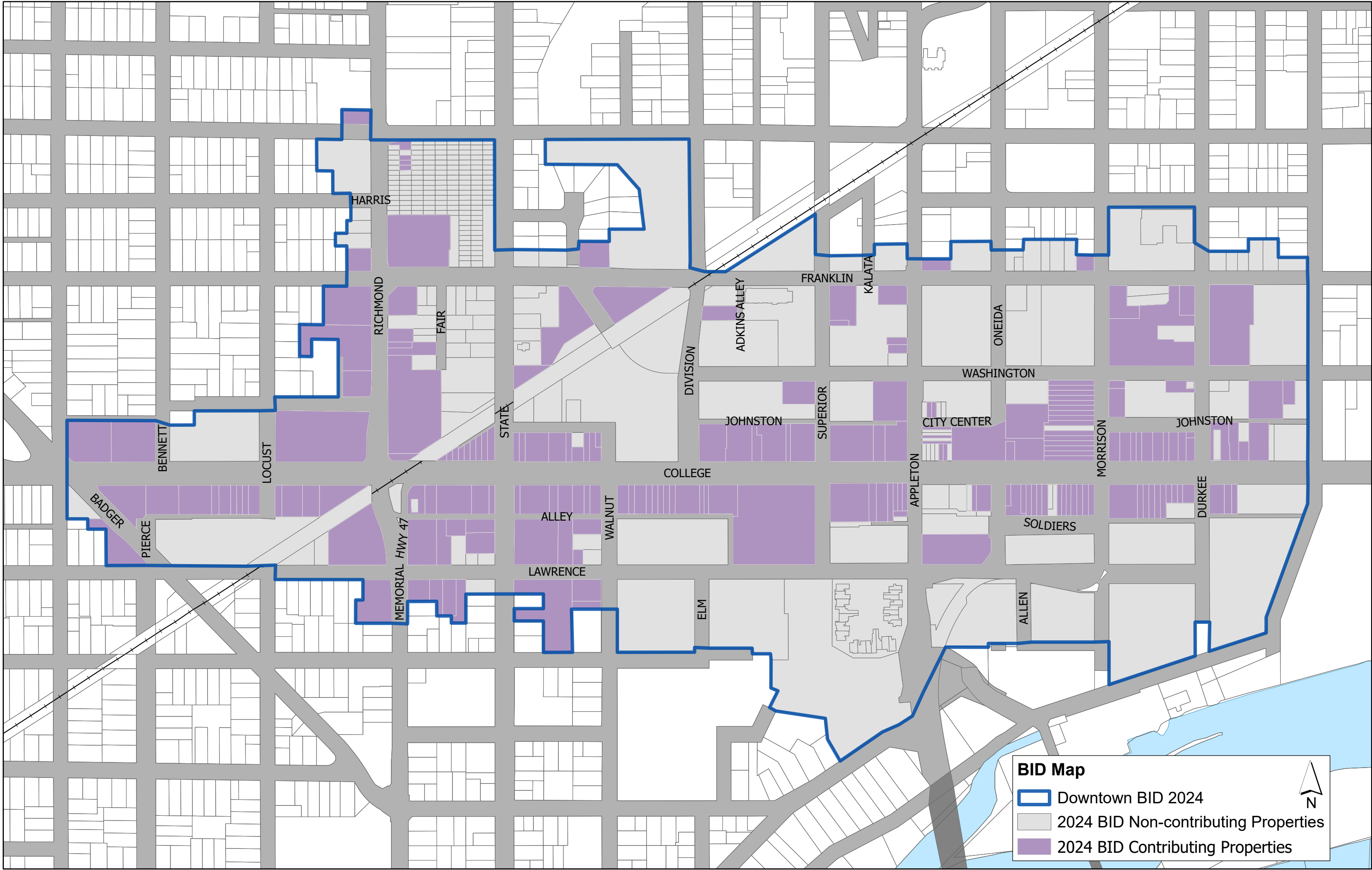


313102000	511	W	COLLEGE AVE			TOBACNOIR LLC			\$126,700	\$655,000	\$781,700	2,149.68	2,149.68	2,149.68
313102100	507	W	COLLEGE AVE			VICTORIAS APPLETON INC			\$66,200	\$279,300	\$345,500	950.13	950.13	950.13
313102200	503	W	COLLEGE AVE			VICTORIAS APPLETON INC			\$132,000	\$275,000	\$407,000	1,119.25	1,119.25	1,119.25
313102300	427	W	COLLEGE AVE			THE BAR GROUP LLC			\$145,300	\$823,500	\$968,800	2,664.20	2,664.20	2,664.20
313102500	425	W	COLLEGE AVE			SUESS MANAGEMENT LLC			\$72,000	\$268,000	\$340,000	935.00	935.00	935.00
313102700	423	W	COLLEGE AVE			FERRUCCIO VC INC			\$141,100	\$1,245,500	\$1,386,600	3,813.15	3,813.15	3,813.15
313102800	417	W	COLLEGE AVE			TH2 INVESTMENTS LLC			\$75,400	\$320,500	\$395,900	1,088.73	1,088.73	1,088.73
313102900	415	W	COLLEGE AVE			HLK VENTURES LLC			\$69,000	\$250,000	\$319,000	877.25	877.25	877.25
313103000	413	W	COLLEGE AVE			RVC LLC			\$72,000	\$203,800	\$275,800	758.45	758.45	758.45
313103100	411	W	COLLEGE AVE	MERLJE		ELMAZI			\$72,000	\$195,700	\$267,700	736.18	736.18	736.18
313103200	409	W	COLLEGE AVE	JULIA		MORALES			\$72,000	\$207,500	\$279,500	768.63	768.63	768.63
313103300	403	W	COLLEGE AVE			AH&M ENTERPRISES LLC			\$292,800	\$1,090,700	\$1,383,500	3,804.63	3,804.63	3,804.63
315069300	305	N	RICHMOND ST			MYLEE'S EGG ROLLS LLC			\$74,700	\$168,000	\$242,700	667.43	667.43	667.43
315071200	225	N	RICHMOND ST			BLUE OFFICE LLC			\$255,200	\$450,400	\$705,600	1,940.40	1,940.40	1,940.40
315105800	532	W	COLLEGE AVE			KEYSTONE FUTURES LLC			\$62,900	\$534,000	\$596,900	1,641.48	1,641.48	1,641.48
315105900	530	W	COLLEGE AVE	ANDREW	R	THORNELL			\$60,500	\$140,500	\$201,000	552.75	552.75	552.75
315106000	524	W	COLLEGE AVE	PATRICK	J	FLANAGAN			\$246,300	\$367,000	\$613,300	1,686.58	1,686.58	1,686.58
315106300	514	W	COLLEGE AVE			NOBLE ASSETS LLC			\$189,700	\$258,000	\$447,700	1,231.18	1,231.18	1,231.18
315106500	512	W	COLLEGE AVE			FRASER PROPERTIES LLC			\$64,000	\$109,500	\$173,500	477.13	477.13	477.13
315106700	508	W	COLLEGE AVE			FRASER PROPERTIES LLC			\$67,500	\$154,000	\$221,500	609.13	609.13	609.13
315106800	506	W	COLLEGE AVE			FRASER PROPERTIES LLC			\$66,200	\$137,500	\$203,700	560.18	560.18	560.18
315107000	500	W	COLLEGE AVE			COLLEGE AVE LEGACY LLC	75.00%		\$101,500	\$273,500	\$375,000	1,031.25	1,031.25	1,031.25
315107001	111	N	WALNUT ST	NATASHA		BANKS	25.00%		\$32,700	\$65,000	\$97,700	268.68	275.00	275.00
315107500	509	W	FRANKLIN ST			BELFEUIL RENTALS LLC			\$124,800	\$110,000	\$234,800	645.70	645.70	645.70
315107502	437	W	FRANKLIN ST			RUNNING PROPERTIES LLC			\$127,700	\$170,000	\$297,700	818.68	818.68	818.68
315107600	136	N	STATE ST	ROBERT		CASTON (ESTATE)			\$51,800	\$66,000	\$117,800	323.95	323.95	323.95
315110000	306	N	RICHMOND ST			KWIK TRIP INC			\$415,600	\$1,568,900	\$1,984,500	5,457.38	5,457.38	5,457.38
315110100	400	N	RICHMOND ST			JN INVESTMENT PROPERTIES LLC ET AL			\$67,700	\$655,300	\$723,000	1,988.25	1,988.25	1,988.25
315110120	400	N	RICHMOND ST			JN INVESTMENT PROPERTIES LLC ET AL			\$16,800	\$121,800	\$138,600	381.15	381.15	381.15
315110121	400	N	RICHMOND ST			JN INVESTMENT PROPERTIES LLC ET AL			\$85,300	\$495,900	\$581,200	1,598.30	1,598.30	1,598.30
315110122	400	N	RICHMOND ST			JN INVESTMENT PROPERTIES LLC ET AL			\$14,100	\$146,600	\$160,700	441.93	441.93	441.93
315113900	226	N	RICHMOND ST			2418 S ONEIDA ST LLC			\$83,600	\$100	\$83,700	230.18	275.00	275.00
315114700	208	N	RICHMOND ST	JAMIE	L	BOYCE			\$43,300	\$83,500	\$126,800	348.70	348.70	348.70
315114800	200	N	RICHMOND ST	JAMIE	L	BOYCE			\$60,600	\$96,000	\$156,600	430.65	430.65	430.65
315114801	204	N	RICHMOND ST	JAMIE	L	BOYCE			\$18,400	\$89,500	\$107,900	296.73	296.73	296.73
315115800	110	N	RICHMOND ST			OLD BRICK PROPERTIES LLC			\$647,700	\$489,100	\$1,136,800	3,126.20	3,126.20	3,126.20
315115900	638	W	COLLEGE AVE			FISHER LLC			\$41,700	\$37,800	\$79,500	218.63	275.00	275.00
315116000	600	W	COLLEGE AVE	EMILIANO		MORALES REV LIV TRUST			\$65,600	\$177,000	\$242,600	667.15	667.15	667.15

315116200	602	W	COLLEGE AVE	SHANE		KRUEGER			\$42,900	\$127,000	\$169,900	467.23	467.23	467.23
315116300	604	W	COLLEGE AVE			FDS LLC			\$36,100	\$134,500	\$170,600	469.15	469.15	469.15
315116400	606	W	COLLEGE AVE	FREDERICK	G	VANHANDEL			\$31,200	\$120,500	\$151,700	417.18	417.18	417.18
315116500	610	W	COLLEGE AVE	FREDERICK	G	VANHANDEL			\$25,700	\$128,000	\$153,700	422.68	422.68	422.68
315116600	612	W	COLLEGE AVE			INVESTMENT CREATIONS LLC			\$20,700	\$131,000	\$151,700	417.18	417.18	417.18
315116700	614	W	COLLEGE AVE			DRS INVESTMENTS LLC			\$18,600	\$132,000	\$150,600	414.15	414.15	414.15
315116800	616	W	COLLEGE AVE	DANIEL	J	YDE			\$12,700	\$93,000	\$105,700	290.68	290.68	290.68
315116900	618	W	COLLEGE AVE	ANTAR		BARQUET-LEYTE ET AL			\$11,200	\$34,500	\$45,700	125.68	275.00	275.00
315117300	700	W	COLLEGE AVE			GRANITE PEAK PROPERTY INVESTMENTS LP ET AL			\$937,500	\$1,409,300	\$2,346,800	6,453.70	5,500.00	5,500.00
315118400	137	N	RICHMOND ST			CHRISTENSEN LAND CO			\$281,100	\$555,500	\$836,600	2,300.65	2,300.65	2,300.65
315118700	133	N	RICHMOND ST			EVERGREEN CREDIT UNION			\$102,900	\$450,000	\$552,900	1,520.48	1,520.48	1,520.48
315121200	900	W	COLLEGE AVE	JOHN	C	MAY REV TRUST			\$282,700	\$1,045,000	\$1,327,700	3,651.18	3,651.18	3,651.18
315121600	926	W	COLLEGE AVE			CAPITAL CREDIT UNION			\$288,000	\$387,500	\$675,500	1,857.63	1,857.63	1,857.63
315128300	501	N	RICHMOND ST			TARDIGRADE PROPERTIES LLC			\$46,800	\$160,000	\$206,800	568.70	568.70	568.70
315191800	500	W	FRANKLIN ST			FRANKLIN PROPERTIES LLC			\$69,900	\$206,000	\$275,900	758.73	758.73	758.73
									<b>\$29,257,500</b>	<b>\$153,596,000</b>	<b>\$182,853,500</b>	<b><u>275,896.69</u></b>		

# **Appendix F**

## **Map of District**



Appleton Downtown, Inc.,  
Business Improvement District & Creative Downtown Appleton, Inc.

# 2023 ANNUAL REPORT

“ Lawrence University is proud to support the incredible work of Appleton Downtown, Inc. (ADI) and contribute to a **vibrant Downtown that makes Appleton ‘One Great Place’ to live, work, learn, and play.** Our continued investment in the Downtown corridor, coupled with our deepening partnership with ADI, will allow us to better serve and support our students, strengthen our engagement with the Downtown community, and reinforce our commitment to a thriving and flourishing Appleton. ”

– President Laurie A. Carter, Lawrence University

“ Choosing Downtown Appleton for my business is a heartfelt decision. It’s a vibrant community bursting with life, where local businesses are cherished. **With its rich tapestry of entertainment, cuisine, art, and culture,** Downtown Appleton offers the perfect backdrop for introducing something new. Supported by Appleton Downtown, Inc. and a lively event calendar, I see it as the ideal home for my dream venture. A place where I thrive among a diverse, vibrant community, spreading joy and being part of something truly special. ”

– Fanni Xie, Owner of Uni Uni Appleton

“ **Moving my business Downtown was one of the easiest decisions I have ever made!** Downtown Appleton is a culturally diverse location with a small-town feel. Our new location allowed us to expand our product lines with the larger storefront and our customer base with its prime location. ”

– Nicole Rocheleau, Owner, Sugar Rushlow Boutique

“ When it came time to renew our lease in the 222 building, we decided to look for a new permanent location, my only stipulation was it had to be in Downtown Appleton. Our modern space is matched by Downtown amenities including covered parking and countless choices to meet friends and colleagues for coffee, dinner or cocktails. **Downtown Appleton continues to raise the bar as the go-to place for entertainment and we are blessed to be a part of it!** ”

– Dan Van Daalwyk, President, Telmark Sales Solutions Inc.

Appleton  
**DOWNTOWN**  
incorporated

BUSINESS IMPROVEMENT DISTRICT  
& CREATIVE DOWNTOWN APPLETON



# 2023 ADI & CDA HIGHLIGHTS

## A YEAR IN REVIEW

### DOWNTOWN APPLETON THRIVES IN 2023

As we turn the page on another year, we're filled with excitement about the continued growth and development of Downtown Appleton. While we faced certain challenges, including fewer business openings and some closures, the overall momentum in development projects remained exceptional. It was ultimately a year marked by significant progress, exciting announcements, and a spirit of collaboration.

- **Downtown Development:** The year kicked off with the highly anticipated Appleton Public Library redevelopment and expansion project, promising a vibrant new space for learning and community engagement. We remain captivated by the Fox Commons project, a mixed-use redevelopment poised to become a vibrant center for medical services, student housing, and entrepreneurship. The partnership between Lawrence University and The Trout Museum of Art further solidified Downtown as a cultural and educational hub with their plans for a new museum, student learning center, and market-rate apartments.
- **Adapting to Change:** The City's lane reconfiguration pilot program presented an opportunity for the community to embrace the changing needs of a walkable and more livable district.
- **Enhancing the Downtown Experience:** We remained committed to fostering a vibrant Downtown environment through our initiatives. We supported new businesses, presented over 70 events including the new Light the Night Market, and invested in audience research and image marketing to elevate our brand and attract visitors.

As we move forward in 2024, ADI, BID and CDA remain dedicated to driving the continued vitality and success of Downtown Appleton forward. We will prioritize:

- **Cleanliness:** Maintaining a clean and welcoming environment remains a top priority.
- **Business Retention and Recruitment:** We will actively support existing businesses and attract new ones to create a diverse and thriving Downtown economy.
- **Marketing and Promotions:** We will showcase Downtown Appleton to our diverse audiences as a must-visit destination for regional and national visitors.
- **Livability Enhancements:** We are committed to making Downtown a desirable place to live, work, and play by investing in initiatives that enhance its livability.
- **Curated Experiences:** From public art to special events, we strive to create memorable experiences for all!

We are confident that 2024 will be another year of significant progress for Downtown Appleton. Thank you for your continued support as we work together to shape a vibrant and prosperous future for our Downtown community.

## THE DOWNTOWN NEIGHBORHOOD

Our Downtown neighborhood continues to expand as a livable urban epicenter. Overall apartment occupancy is steady at 96%.\* In 2023, we celebrated the opening of Park Central, The Residences at Zuelke and Urbane 115! As demand remains high, new units are on the horizon:

- **RISE Apartments** featuring 43 low-moderate income and 5 market rate units
- **200 W. College** redevelopment featuring 21 market rate apartments
- **Lawrence University's west campus building** featuring 42 market rate apartments
- **The redeveloped Fox Commons** will include 170 LU student housing units

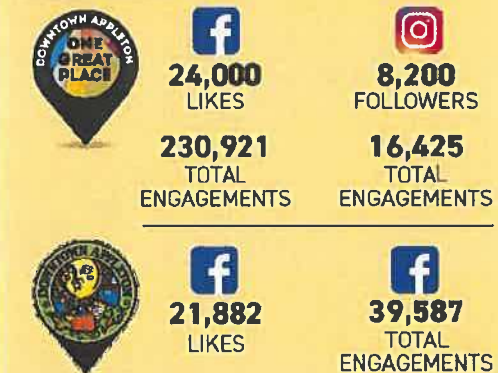
\* Just open Dec. 2023, Urbane 115 is excluded from this average.

## MARKETING

Web: Engaged User Sessions —



Social Media —



New Image Marketing Strategy —

Create and execute a well-defined marketing strategy that spans various channels, with a clear focus on addressing the specific needs and desires of Downtown Appleton's core audiences that is easily measurable.

- **Objectives:**
  - Enhance Downtown Appleton's identity
  - Execute targeted marketing campaigns
  - Compete effectively with surrounding areas
  - Attract businesses to Downtown
  - Promote Downtown living
- **Audiences**
  - Local & drive visitors
  - Existing & potential residents
  - Potential Downtown business owners

## GIFT CERTIFICATES

**2,295** Total number sold  
**\$67,369** Total value sold



## MISSION

To create and enhance the cultural environment of Downtown Appleton by providing opportunities for community access to arts, music and cultural activities.



LIGHT THE NIGHT MARKET

# 2023 BUSINESS IMPROVEMENT DISTRICT HIGHLIGHTS

## BID GRANT INVESTMENTS

### Grant Support —



### TIF Grants —

City of Appleton TIFs #11 & #12 Business Enhancement Grants awarded to 4 properties totaling \$22,447 and leveraging just over \$43,945 in private investment in these districts.



Scan to access the 2024 Collaborative BID/ADI/CDA Operating Plan

## DOWNTOWN BY THE NUMBERS

- **536 housing units** built or proposed between 2020 - 2025
- **New Housing Development Investment** in the district in 2023: **\$38,250,000**
- **103,000 total Downtown Hotel Room Nights** in 2023
- **84 Downtown Event Days** presented by ADI and Community Partners
- **Property Breakdown:**\*

- Retail 15%**
- Hospitality 21%**
- Office 24%**
- Service 14%**
- Attractions 4%**
- Vacancy 22%**



\*Does not include properties under construction.

The Business Improvement District underwent a reassessment in 2023 as part of the full city reassessment. The total assessed value of the 206 BID properties experienced an overall increase of 24.9%, resulting in a current assessed value of \$174,395,400.

The 2023 BID Budget reflects the BID Board of Directors, City Planning Commission and City Council approved BID rate of \$2.75 per \$1000 of assessed value, with a minimum of \$275 and maximum of \$5500.

## KEEPING DOWNTOWN CLEAN

The C.A.R.E. Team, in partnership with Riverview Gardens and the City of Appleton, in 2023 completed 612 hours of cleaning and collected 131 bags of garbage. The program served 343 Service Works participants. They acquire employability training while contributing to the cleanliness of the district.



612  
HOURS

In 2023, we continued our contract with the Pfefferle Management team to help keep Downtown clean and beautiful for the community. They completed 246 hours of service helping clean up garbage, remove graffiti and repair miscellaneous damage throughout the district.



246  
HOURS

## BUSINESS IMPROVEMENT DISTRICT

REVENUE	2023 Actual	2024 Budget
BID Assessments	241,512	275,355
Carryover from Prior Year	23,762	37,840
	<b>\$265,274</b>	<b>313,195</b>
EXPENSES		
<b>Contracted Services</b>		
ADI Staff	49,756	55,000
Administrative	6,411	7,017
BID Audit	3,356	3,100
Marketing and Printing	75,966	110,000
Image Marketing Strategy	5,500	
<b>Economic Development</b>		
Façade Grant	35,993	45,000
Marketing Grant	8,045	
Recruitment Grant	8,575	15,000
Business, Employee & Resident Recruitment	2,550	15,000
<b>Maintenance Services</b>		
Maintenance/Flowers	31,282	40,000
Pedestrian improvements		3,500
	<b>\$227,434</b>	<b>\$293,617</b>
<b>CARRYOVER</b>	<b>\$37,840</b>	<b>\$19,578</b>

## APPLETON DOWNTOWN, INC. AND CREATIVE DOWNTOWN APPLETON, INC. BOARD OF DIRECTORS 2023

### PRESIDENT

**Lyssa King**, Downtown Resident & King Brokerage

### PAST PRESIDENT

**Laura Vargosko**, Thrivent Financial

### VICE PRESIDENT

**Steve Lonsway**, Stone Arch Brewpub

### SECRETARY

**Kolby Knuth**, Knuth Financial Planning and The 513

### TREASURER

**Tom Klister**, FORE Development + Investment Group

**Kevin Wirth**, U.S. Venture

**Natalie Klika**, Johnson Financial Group

**Madera Allan**, Lawrence University

**Kara Manuel**, Lillians of Appleton

**Todd Heid**, Heid Music

**Jeff Gelger**, J. Geiger Consulting

**Kyle Fritz**, On The Fritz Concessions

**Amanda Furman**, Furman Real Estate Collective

**Bri Kapheim**, Spats

**Matt Rehbein**, City of Appleton

**Monika Austin**, Beatnik Betty's Resale Butik

## BUSINESS IMPROVEMENT DISTRICT BOARD OF DIRECTORS 2023

### PRESIDENT

**Gary Schmitz**, Community Advocate

### TREASURER

**Jason Druzman**, Avenue Jewelers

### SECRETARY

**Bill Wetzel**, Acoca Coffee

**Tim Ceman**, Nobel Assets

**Brad Schwebs**, Pefferle Management

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

**Monica Stage/David Kress**, City of Appleton

**Benjamin King**, Downtown Resident and King Brokerage

**Walter Schonfeld**, DKS Management Service, LLC

## APPLETON DOWNTOWN, INC. STAFF 2023

EXECUTIVE DIRECTOR  
**Jennifer Stephany**

EVENTS DIRECTOR  
**Carissa Hackel**

MARKETING DIRECTOR  
**Abby Novak**

EVENTS COORDINATOR  
**Sandy Storch**

COMMUNITY PARTNERSHIP DIRECTOR  
**Meghan Warner**

ADMINISTRATIVE & MARKETING COORDINATOR  
**Meghan Petters**

# THANK YOU

Thank you for sponsoring our events and creative projects in 2023!

4Imprint	Festival Foods	NAI Pefferle / Pefferle Management
Abby Bank	Fleet Farm	Network Health
Amcpr	Fox Cities Magazine	Prevea Health
Appleton International Airport (ATW)	Fox Communities Credit Union	Runaway Shoes
AT&T	Gateway Chiropractic	State Farm
Bazil's	General Beer	Steve & Teri Winter
Benefit Insurance	Heid Music & Heid Music Foundation	Sure-Dry Basement Systems
The Boldt Company	Hilton Appleton Paper Valley Hotel	TDS
Brian and Kat Gottlieb	Hoffman Planning, Design & Construction Inc.	ThedaCare
Brian Hodgkiss Injury Lawyers	J. Geiger Consulting	Tundraland
City of Appleton	Johnson Financial Group	Uliness Health
Community First Credit Union	Kay Distributing	U.S. Venture
Consolidated Construction Co.	Kimberly Clark Cares Foundation	Warning Lites of Appleton, Inc
CopperLeaf Boutique Hotel	Knuth Financial Life Planning	Water Right's Clean Water Center
CoVantage Credit Union	Lee Beverage	Willems Marketing
Crane Engineering	McCain Foods	Wisconsin Distributors
Ducommun	Mile of Music Festival	Woodward Community Media
Event Production Systems (EPS)		
FC Retrofoam		



## 2023 AWARD WINNERS

### Business of the Year Award - Beatnik Betty's Resale Butik

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

### Bernie Pearlman Downtowner Award - Julie Gardner

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

### The Mike Pefferle Dreamers & Doers Award - The Residences at Zuelke

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

### President's Award - Linda Garvey, Hilton Paper Valley Hotel

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

### Harvey Samson Outstanding Volunteer Award - Paul Kryszak

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

### Downtown Renovation Award - Telmark Sales Solutions

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

### Rising Star Award - Topsy Taco & Tequila Bar

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

### Walter Kalata Landmark Award - Building for Kids Children's Museum

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

Appleton Downtown, Inc.  
Creative Downtown Appleton, Inc.  
Business Improvement District  
333 W College Ave, Suite 100, Appleton, WI 54911  
920-954-9112 • Fax 920-954-0219 • info@appletondowntown.org

appletondowntown.org #onegreatplace





**CITY OF APPLETON  
BUSINESS IMPROVEMENT DISTRICT**

**A COMPONENT UNIT OF THE  
CITY OF APPLETON, WISCONSIN**

**FINANCIAL STATEMENTS AND  
SUPPLEMENTARY INFORMATION**

**YEAR ENDED DECEMBER 31, 2023**



CPAs | CONSULTANTS | WEALTH ADVISORS

[CLAcconnect.com](http://CLAcconnect.com)

**CITY OF APPLETON BUSINESS IMPROVEMENT DISTRICT  
APPLETON, WISCONSIN  
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## INDEPENDENT AUDITORS' REPORT

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

### **Report on the Audit of the Financial Statements**

#### ***Opinion***

We have audited the accompanying financial statements of Appleton Business Improvement District (the District), a component unit of the City of Appleton, Wisconsin, as of and for the year ended December 31, 2023, and the related notes to the financial statements which collectively comprise the District's basic financial statements as listed in the table of contents.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the District as of December 31, 2023, and the changes in its financial position and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

#### ***Basis for Opinion***

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS). Our responsibilities under those standards are further described in the Auditors' Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the District and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

#### ***Responsibilities of Management for the Financial Statements***

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

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the District's ability to continue as a going concern for twelve months beyond the financial statement date, including any currently known information that may raise substantial doubt shortly thereafter.

***Auditors' Responsibilities for the Audit of the Financial Statements***

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the District's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

***Required Supplementary Information***

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

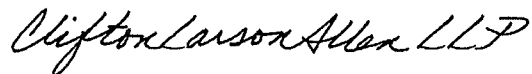
Board of Directors  
Appleton Business Improvement District  
City of Appleton, Wisconsin

***Supplementary Information***

Our audit was conducted for the purpose of forming an opinion on the District's financial statements that collectively comprise the District's basic financial statements. The schedule of revenues, expenses, and changes in net position – budget and actual is presented for purposes of additional analysis and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The schedule of revenues, expenses, and changes in net position – budget and actual has been subjected to the auditing procedures applied in the audit of the basic financial statements, and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the schedule of revenues, expenses, and changes in net position – budget and actual is fairly stated in all material respects in relation to the basic financial statements as a whole.

***Report on Summarized Comparative Information***

We have previously audited the District's 2022 financial statements, and we expressed an unmodified opinion on the financial statements of the District in our report dated June 22, 2023. In our opinion, the summarized comparative information presented herein as of and for the year ended December 31, 2022, is consistent, in all material respects, with the audited financial statements from which it has been derived.



**CliftonLarsonAllen LLP**

Green Bay, Wisconsin  
June 4, 2024

## FINANCIAL STATEMENTS

**CITY OF APPLETON BUSINESS IMPROVEMENT DISTRICT  
 APPLETON, WISCONSIN  
 STATEMENT OF NET POSITION  
 DECEMBER 31, 2023  
 (WITH SUMMARIZED FINANCIAL INFORMATION AS OF DECEMBER 31, 2022)**

	2023	2022
<b>ASSETS</b>		
Current Assets:		
Cash and Investments	\$ 267,934	\$ 206,658
Special Assessments Receivable	128,930	96,001
Total Assets	396,864	302,659
<b>LIABILITIES</b>		
Current Liabilities:		
Accounts Payable	69,267	37,385
<b>DEFERRED INFLOWS OF RESOURCES</b>		
BID Assessments Levied for Subsequent Year	275,356	241,512
<b>NET POSITION</b>		
Unrestricted	52,241	23,762
Total Net Position	\$ 52,241	\$ 23,762

See accompanying Notes to Financial Statements.

**CITY OF APPLETON BUSINESS IMPROVEMENT DISTRICT**  
**APPLETON, WISCONSIN**  
**STATEMENT OF REVENUES, EXPENSES, AND CHANGES IN NET POSITION**  
**YEAR ENDED DECEMBER 31, 2023**  
(WITH SUMMARIZED FINANCIAL INFORMATION FOR THE YEAR ENDED DECEMBER 31, 2022)

	<u>2023</u>	<u>2022</u>
<b>OPERATING REVENUES</b>		
BID Assessments	\$ 241,512	\$ 235,485
<b>OPERATING EXPENSES</b>		
Contracted Services	49,756	50,000
Administrative:		
Telephone	2,996	3,051
Office Supplies	447	173
Postage	892	1,208
Conferences/Workshops/Classes	120	-
Dues, Fees, and Subscriptions	1,320	1,183
Facility Rent	558	709
Total Administrative	<u>6,333</u>	<u>6,324</u>
Audit and Accounting Services	3,356	3,051
Marketing:		
Advertising	76,841	73,911
Printing	1,762	-
Total Marketing	<u>78,603</u>	<u>73,911</u>
Economic Development Projects:		
Sidewalk Maintenance/Amenities	28,723	33,040
Façade Grants	35,993	39,124
Marketing Grants	8,045	6,421
Recruiting Grant	8,575	17,100
Business Recruitment	2,550	6,451
Total Economic Development Projects	<u>83,886</u>	<u>102,136</u>
Total Operating Expenses	<u>221,934</u>	<u>235,422</u>
<b>OPERATING INCOME (LOSS)</b>	19,578	63
<b>NONOPERATING REVENUES</b>		
Investment Income (Loss)	<u>8,901</u>	<u>(4,309)</u>
<b>CHANGE IN NET POSITION</b>	28,479	(4,246)
Net Position - Beginning of Year	<u>23,762</u>	<u>28,008</u>
<b>NET POSITION - END OF YEAR</b>	<u>\$ 52,241</u>	<u>\$ 23,762</u>

See accompanying Notes to Financial Statements.



**CITY OF APPLETON BUSINESS IMPROVEMENT DISTRICT  
 APPLETON, WISCONSIN  
 STATEMENT OF CASH FLOWS  
 YEAR ENDED DECEMBER 31, 2023  
 (WITH SUMMARIZED FINANCIAL INFORMATION FOR THE YEAR ENDED DECEMBER 31, 2022)**

	2023	2022
<b>CASH FLOWS FROM OPERATING ACTIVITIES</b>		
Cash Received from District Members	\$ 242,427	\$ 227,044
Cash Paid to Suppliers	(190,052)	(221,676)
Net Cash Provided (Used) by Operating Activities	52,375	5,368
 <b>CASH FLOWS FROM INVESTING ACTIVITIES</b>		
Gain (Loss) in Pooled Cash	8,901	(4,309)
 <b>CHANGE IN CASH AND CASH EQUIVALENTS</b>	61,276	1,059
Cash and Cash Equivalents - Beginning of Year	206,658	205,599
 <b>CASH AND CASH EQUIVALENTS - END OF YEAR</b>	\$ 267,934	\$ 206,658
 <b>RECONCILIATION OF OPERATING INCOME TO NET CASH PROVIDED (USED) BY OPERATING ACTIVITIES</b>		
Operating Income	\$ 19,578	\$ 63
Adjustments to Reconcile Operating Income to Net Cash Provided (Used) by Operating Activities:		
Change in Operating Assets and Liabilities:		
Special Assessments Receivable	(32,929)	(14,468)
Accounts Payable	31,882	13,746
BID Assessments Levied for Subsequent Year	33,844	6,027
Net Cash Provided (Used) by Operating Activities	\$ 52,375	\$ 5,368

See accompanying Notes to Financial Statements.

**CITY OF APPLETON BUSINESS IMPROVEMENT DISTRICT  
APPLETON, WISCONSIN  
NOTES TO FINANCIAL STATEMENTS  
DECEMBER 31, 2023**

**NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES**

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

**A. Reporting Entity**

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

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

**B. Measurement Focus and Basis of Accounting**

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

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

**CITY OF APPLETON BUSINESS IMPROVEMENT DISTRICT  
APPLETON, WISCONSIN  
NOTES TO FINANCIAL STATEMENTS  
DECEMBER 31, 2023**

**NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)**

**B. Measurement Focus and Basis of Accounting (Continued)**

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

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

**C. Assets, Liabilities, Deferred Outflows/Inflows of Resources, and Net Position**

**1. Cash and Investments**

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

**2. BID Special Assessments**

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

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

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

**CITY OF APPLETON BUSINESS IMPROVEMENT DISTRICT  
APPLETON, WISCONSIN  
NOTES TO FINANCIAL STATEMENTS  
DECEMBER 31, 2023**

**NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)**

**C. Assets, Liabilities, Deferred Outflows/Inflows of Resources, and Net Position  
(Continued)**

**4. Net Position**

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

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

**5. Claims and Judgements**

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

**D. Prior Year Information**

Comparative amounts for the prior year have been presented in the financial statements to provide an understanding of changes in the District's financial position and operations. The comparative amounts may be summarized in total and not at the level of detail required for a presentation in conformity with generally accepted accounting principles. Accordingly, such information should be read in conjunction with the District's financial statements for the year ended December 31, 2022, from which the summarized information was derived.

**CITY OF APPLETON BUSINESS IMPROVEMENT DISTRICT  
APPLETON, WISCONSIN  
NOTES TO FINANCIAL STATEMENTS  
DECEMBER 31, 2023**

**NOTE 2 STEWARDSHIP AND COMPLIANCE**

**A. Operating Plan**

The budgetary information is derived from the District's annual operating plan budget and is presented using the same basis of accounting as described in Note 1.B. The 2023 Operating Plan, as approved by the board of directors and common council, included provisions for District assessments and related spending of \$241,512. The board of directors and management use the budget to manage the District's program activities; however, the budget does not represent a legal budget establishing specific line item expenditure limits.

**NOTE 3 DETAILED NOTES ON ALL FUNDS**

**A. Cash and Investments**

The District's cash and investments total \$267,934 are commingled with the cash and investment accounts of the City of Appleton; therefore, individual bank balances of the District cannot be determined. Please refer to the City's financial statements for further information.

The City's Annual Comprehensive Financial Report can be located at [www.appleton.org/government/finance](http://www.appleton.org/government/finance).

**NOTE 4 OTHER INFORMATION**

**A. Risk Management**

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

**B. Contingencies**

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

**SUPPLEMENTARY INFORMATION**

**CITY OF APPLETON BUSINESS IMPROVEMENT DISTRICT  
APPLETON, WISCONSIN  
SCHEDULE OF REVENUES, EXPENSES, AND CHANGES IN NET POSITION  
BUDGET AND ACTUAL  
YEAR ENDED DECEMBER 31, 2023**

	Original Budget	Final Budget	Actual	Variance Final Budget - Positive (Negative)
<b>OPERATING REVENUES</b>				
Bid Assessments	\$ 241,512	\$ 241,512	\$ 241,512	\$ -
<b>OPERATING EXPENSES</b>				
Contracted Services	50,000	50,000	49,756	244
Administrative:				
Telephone	-	-	2,996	(2,996)
Office Supplies	-	-	447	(447)
Postage	-	-	892	(892)
Conferences/Workshops/Classes	-	-	120	(120)
Dues, Fees, and Subscriptions	-	-	1,320	(1,320)
Facility Rent	-	-	558	(558)
Total Administrative	<u>6,412</u>	<u>6,412</u>	<u>6,333</u>	<u>79</u>
Audit and Accounting Services	2,600	2,600	3,356	(756)
Marketing:				
Advertising	80,500	75,000	76,841	(1,841)
Printing	-	-	1,762	(1,762)
Total Marketing	<u>80,500</u>	<u>75,000</u>	<u>78,603</u>	<u>(3,603)</u>
Economic Development Projects:				
Sidewalk Maintenance/Amenities	35,000	35,000	28,723	6,277
Façade Grants	40,000	40,000	35,993	4,007
Marketing Grants	10,000	10,000	8,045	1,955
Recruiting Grant	15,000	15,000	8,575	6,425
Business Recruitment	7,500	7,500	2,550	4,950
Total Economic Development Projects	<u>107,500</u>	<u>107,500</u>	<u>83,886</u>	<u>23,614</u>
Total Operating Expenses	<u>247,012</u>	<u>241,512</u>	<u>221,934</u>	<u>19,578</u>
<b>OPERATING INCOME (LOSS)</b>	(5,500)	-	19,578	19,578
<b>NONOPERATING REVENUES</b>				
Investment Income (Loss)	-	-	8,901	8,901
<b>CHANGE IN NET POSITION</b>	(5,500)	-	28,479	28,479
Net Position - Beginning of Year	<u>23,762</u>	<u>23,762</u>	<u>23,762</u>	<u>-</u>
<b>NET POSITION - END OF YEAR</b>	<u>\$ 18,262</u>	<u>\$ 23,762</u>	<u>\$ 52,241</u>	<u>\$ 28,479</u>



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