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An Implementation Study of a Business Improvement District for Davis Square in Somerville, Massachusetts

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AN IMPLEMENTATION STUDY OF A BUSINESS IMPROVEMENT DISTRICT FOR DAVIS SQUARE IN SOMERVILLE, MASSACHUSETTS

A Master's Project
by
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May 2014

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Acknowledgements

I dedicate this research project to the City of Somerville's Mayor's Office of Strategic Planning and Community Development (OSPCD). I am grateful for the staff at OSPCD for providing me with a wealth of knowledge and mentorship while I was an intern over the past three years.

I express gratitude to John Mullin, Ph. D., FAICP, Chair of this project's committee, for taking me under his guidance in the Center for Economic Development. I am grateful for Dr. Mullin for taking a particular interest in sharing his knowledge with me and preparing me to become a city planner. Dr. Mullin's help on this project was instrumental to its completion. I would also like to thank Henry Renski, Ph. D., for offering his wisdom throughout my years as one of his students and for his assistance throughout my time in the Center for Economic Development. I will always be appreciative for the educational and professional knowledge offered to me by Dr. Mullin and Dr. Renski.

I would also like to thank Sarah la Cour, Executive Director – Amherst BID, and Natasha Yakovlev, Interim Director – Northampton BID, for their insights on their respective BIDs.

I will always be grateful for the love and support from my family throughout my entire academic career.

Last but not least, my academic and professional accomplishments would not have been achieved if it were not for my wonderful girlfriend, Kelley Landry. I would like to congratulate her for receiving a Master of Arts in Communication Disorders this spring.

Chapter 1 – Introduction

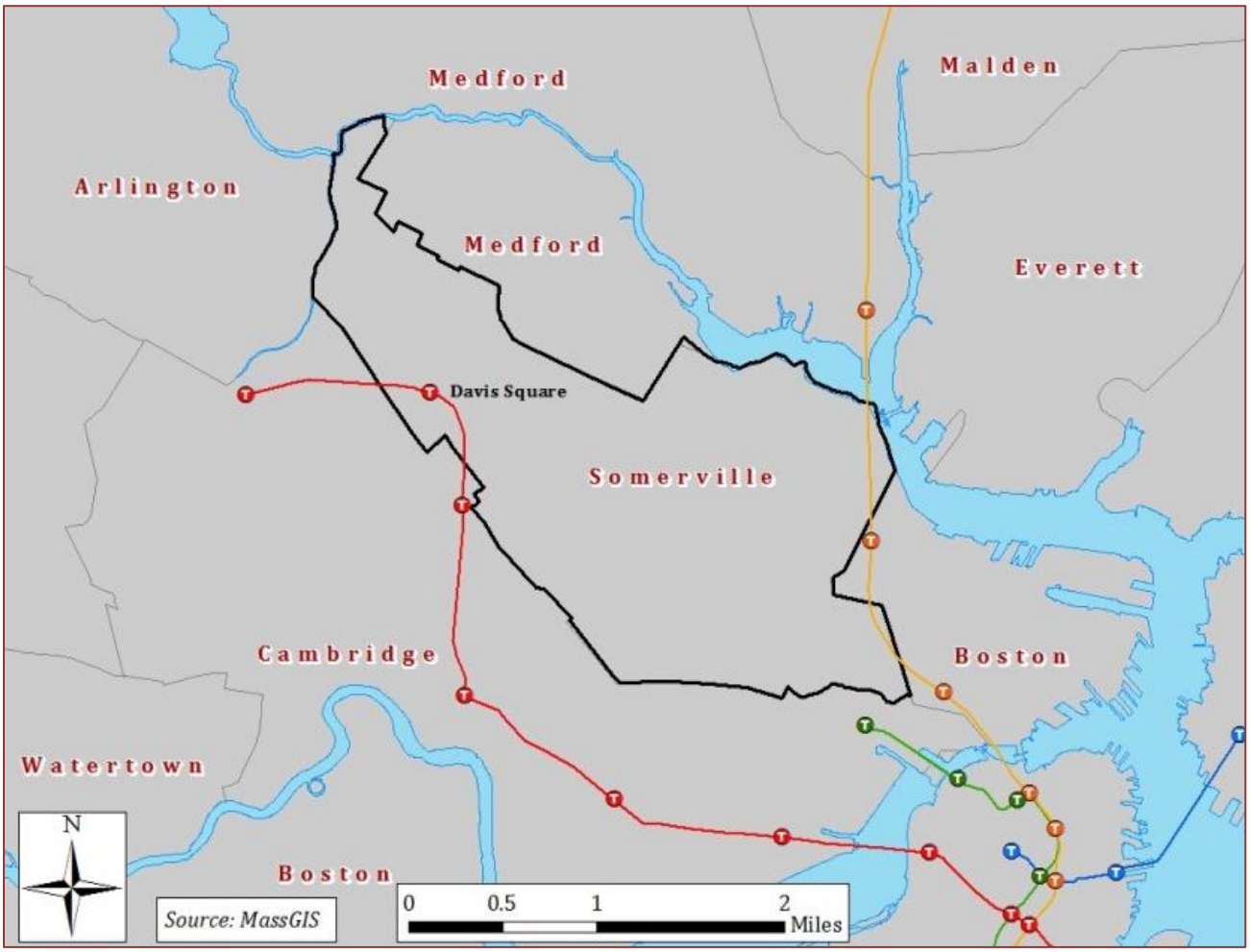
1.1 Purpose

The purpose of this Master's project is to research how a business improvement district (BID) could be implemented in the Davis Square commercial district of Somerville, Massachusetts. An assessment of Davis Square has been conducted through a collaborative effort between planning staff in Somerville's Mayor's Office of Strategic Planning and Community Development (OSPCD) and neighborhood stakeholders to identify key issues in the area. This project uses case study examples to understand the types of improvements and services that BIDs in neighborhoods similar to Davis Square provide. Furthermore, case study examples provide information regarding assessment methods and services provided by pertinent BIDs in order to assess their feasibility in Davis Square. An assessment fee structure is presented to determine the revenue potential of a BID in Davis Square. Services that could be provided by a Davis Square BID are also presented along with the benefits of each service. This project concludes by identifying next steps for the municipality and property owners to move forward in establishing a BID.

1.2 Background

The City of Somerville, located next to Boston, is New England's most densely populated city.[1] In addition to Boston, Somerville also borders Cambridge, Medford, and Arlington by land and Everett along the Mystic River. Figure 1 shows Somerville's

Figure 1: Geographic Context Map



surrounding communities. Somerville's built environment consists of numerous

[1] According to the 2010 Decennial Census, Somerville had a population of 75,754 in just 4 square miles of land. Somerville is the 15th most densely populated city in the United States (1st in New England) with 18,432 people per square mile.

squares that serve as commercial and entertainment hubs for each neighborhood and feature ethnic restaurants, bars, shops, and a variety of personal and professional service establishments. Perhaps the most vibrant and active square in Somerville is Davis Square. Davis Square's vibrancy is attributed to its high population of college students from mostly Tufts University but also Harvard University and the Massachusetts Institute of Technology (MIT). The Davis Square subway station along the Massachusetts Bay Transportation Authority's (MBTA) Red Line helps transport a large regional population that supports Davis Square's plethora of dining, shopping, service, and entertainment businesses.

Somerville has a rich history and culture that dates back to 1630 when Somerville was first settled as a part of Charlestown. Charlestown urbanized and Somerville became its own separate rural town in 1842. Thirty years later in 1872, a growing population and increasing elements of industrialization led Somerville to become incorporated as a City. In the early 1900's Somerville became a dense community featuring European immigrants from Italy, Ireland, and Portugal that either worked in Somerville or commuted into Boston (Lund 1996). The influx of immigrants helped Davis Square become a vibrant commercial and transportation center that connected Somerville to Boston. Davis Square's prosperity suffered with the conclusion of World War II.

After World War II urban centers, including Davis Square, suffered from the impacts of suburbanization. The high levels of population, pollution, and traffic in urban centers drew people to suburban communities where there were more open spaces, job opportunities, and less expensive housing options. Also, the development of

railways, highways, and roads made it more practical for suburban dwellers to live outside of cities and commute into them for work. When Davis Square had its trains rerouted it saw businesses and residents move out to suburban communities along Interstate-128, which makes a ring around Boston, in pursuit of job opportunities and less expensive housing. The effects of suburbanization resulted in Davis Square's decline until community intervention halted highway projects and advocated for rail transit projects (TCRP 1997, 39).

In 1984, due to advocacy from Somerville's Office of Housing and Community Development (OHCD), the Davis Square Task Force, and local merchants, the Massachusetts Bay Transportation Authority (MBTA) extended its Red Line into Davis Square. After the station opened Davis Square saw several physical improvements in the neighborhood including public art, granite and brick sidewalks, numerous storefront improvements, and landscaping improvements. The physical improvements led to an influx of new restaurants, new office spaces, and start-up businesses that revitalized the square and the spirit of Davis Square residents (TCRP 1997, 42).

Today, Somerville remains a dense walkable community with a diverse mix of blue-collar worker families, young professionals, college students, and immigrants from all over the world. Somerville has high education attainment but earns lower wages compared to the rest of the state. The 2008-2012 American Community Survey, reports that 53.3% of Somerville residents have at least a Bachelor's Degree whereas 39% of Massachusetts residents have at least a Bachelor's Degree. As reported in the third quarter of 2013, the average weekly wage in Somerville was $849 compared to the state's average of $1,131 (Mass. Executive Office of Labor and Workforce Development).

Furthermore, Somerville has a relatively young and diverse population. The 2010 U.S Decennial Census reported that 43.6% of Somerville residents were between the age of 20 and 34 whereas the state had 20.1% of its population in the 20-34 age cohort.[2] Over 25.5% of Somerville residents were born outside of the United States (2008-2012 American Community Survey). City of Somerville officials have engaged residents from a wide range of backgrounds to participate in discussions and workshops to help guide the city's future economic development and physical form.

1.3 Current Planning Efforts

The City of Somerville adopted a Comprehensive Plan in 2012, titled SomerVision, to help guide future planning decisions for the next twenty years. SomerVision is the result of over fifty public meetings, workshops, and visioning sessions that occurred in a three year time period. One of the main goals of SomerVision is financial self-sufficiency in commercial corridors and to reduce fiscal dependence on typical revenue sources such as state aid, property taxes, and fees. Establishing a BID is one of the recommended action steps in order for the city to leverage creative financing options to encourage commercial development. A public planning initiative began in Davis Square called *Somerville by Design: Davis Square* in the spring of 2013.

Somerville by Design: Davis Square is an innovative approach to neighborhood planning that deliberatively brings community members together to envision ideas about physical planning and economic development. It follows a philosophical model of

[2] Somerville has the second largest concentration of people between the age of 25 to 35 years old in the country. Hoboken, New Jersey has the highest.

neighborhood planning that officials refer to as "Outreach, Dialogue, Decide, and Implement". *Somerville by Design* has occurred in other neighborhoods of the city in preparation of the MBTA Green Line Extension to Gilman Square, Magoun Square, and Ball Square. The outreach portion of *Somerville by Design: Davis Square* occurred in the spring of 2013 when city planners hosted a crowd-sourcing event and two visioning workshops[3]. The dialogue portion occurred in early September of 2013 and included a three–day design charrette. The design charrette led to 42 ideas from community members and were organized and shared at a "pin up presentation" and on the Somerville by Design blog. At the time of this publication, City officials are taking in feedback of all the 42 ideas.

The *Somerville by Design: Davis Square* initiative has resulted in many ideas from the community that include creating more public green spaces, outdoor markets, office space, bicycle infrastructure, and reconfiguring street networks. The scale of the ideas generated range from actions that can be completed in a few months to actions that may require a decade or more to implement. Some of the ideas can be fulfilled by the City, but most involve partnerships between public and private entities.

1.4 Municipal Revenue Sources

Municipalities in Massachusetts have two primary sources of income – payments and aid. Municipalities receive payments in the form of property taxes and local receipts in exchange for services. Property taxes are levied against all property owners

[3] Outreach is an ongoing process where city planners collect input from residents and business owners via surveys and communication via an online blog (www.SomervillebyDesign.com).

on the assessed value of their land, unless exempt, and are used to provide basic services that all property owners receive such as weekly trash pickup, snow removal, public safety, and other general government services. Local receipts are fees generated in exchange for optional services that not every property owner will incur, such as: obtaining a marriage license, receiving a copy of a birth certificate, obtaining a dog license, applying for zoning relief, or applying for a building permit. Local receipts are also generated through the issuing of fines for parking violations, ordinance violations, and enterprise accounts (water and sewer). Municipalities also generate revenue by applying for grants and bonds from Federal, State, and private entities. According to the fiscal year 2014 budget, the City of Somerville expects to collect $115.8 million in property taxes, $7.4 million in excise taxes, and $14.2 million in local receipts.

Aid comes to municipalities from the Federal and State governments. Over the last three decades municipalities throughout Massachusetts have seen decreases in local aid (Schuster, 2012). As a result of decreasing aid, municipalities have had to use more of their own money to cover the cost of government services. Municipalities have been forced to consider alternative methods of providing residents and businesses with quality services while receiving less financial aid from the state.

One common method for municipalities to generate revenue in light of decreasing aid is to diversify or expand the tax base. In Somerville, residential properties are charged a lower tax rate then commercial properties. Municipalities with a split tax rate that have a high percentage of their total tax levy attributed to residential assessments often seek to diversify and expand their tax base by adding commercial assessments to the levy in order to generate more revenue and offset the

burden for residents. If a municipality successfully gains enough revenue through more commercial assessments then the tax rate could be lowered.

On November 26, 2013, the City of Somerville announced, via a press release, that the city lowered its tax rates for residential properties from $13.42 to $12.66 per $1,000 (a 5.7% decrease) and from $22.38 to $21.51 per $1,000 (a 3.9% decrease) for commercial properties. Chief Assessor, Marc Levye, RMA, MAA, attributes the decreases in the tax rates to unprecedented gains of $3.5 million in property tax revenue due to new commercial growth mostly in Assembly Square[4] (City of Somerville, 2013). By lowering the tax rate the City aims to retain middle and working class families that have lived in the city for generations during a time where the historic shift of people living in urban cores are increasing real estate prices (City of Somerville, 2013). The City believes that municipal services can still be improved, more investment in education can be made, housing affordability can be maintained, and the residential tax rate can be decreased by continuing to expand the commercial tax base (City of Somerville, 2013).

However, despite the tax rate being lowered many property owners, particularly in Davis Square, saw their assessments increase significantly due to a rise in total valuations. Every three years the Massachusetts Department of Revenue (MassDOR) requires that each municipality conduct a revaluation of all the real property in each jurisdiction. Revaluation ensures that municipal assessors are assessing property at its

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[4] Assembly Square is estimated to create 1.75 million square feet of new office space, 852,000 square feet of retail space, a 200-room hotel, and 2,100 residential units in a Planned Unit Development that will create a new mixed use neighborhood on the site of a former Ford Motor assembly plant. It is currently under construction.

fair market value, the amount a willing buyer would pay to a willing seller under no special circumstances. In Somerville, the revaluation process led to increased total assessed values therefore property owners saw their tax bills increases despite the tax rate being lowered. In response, the City of Somerville has drafted a Home Rule petition in March 2014 to increase the exemption for owner occupied residential real property from 30 percent to 35 percent (City of Somerville, 2014). Davis Square consists of mostly mixed use buildings that consist of ground floor retail with primarily commercial space and some residential units on upper floors. Most of Davis Square is in a zoning district classified as a Central Business District (CBD), which allows

Figure 2: Infill Potential in Davis Square

Source: Google Earth. (2013). Birdseye photograph of Davis Square. Google Inc.

buildings to be as high as four stories. There are multiple buildings in the core of Davis Square that are only one or two stories (marked by red boxes in Figure 2) that provide opportunities for infill development. A BID could help encourage infill development by marketing the district to be an office destination, which could increase the demand for infill development of new office and retail spaces. Infill development can help attract new businesses and increase job opportunities for local residents and add more commercial tax assessments to the levy and lessen the burden for residential tax payers. A parcel that undergoes significant redevelopment would increase in value and pay the BID organization more money that will go back to funding district wide improvements.

Davis Square's strategic location along the MBTA's Red Line and proximity to Tufts University make Davis Square Somerville's most popular, vibrant, and active commercial center. Despite Davis Square's popularity within Somerville and the Greater Boston region, local residents, property owners, and merchants have identified a need for better maintenance, increased cleanliness, economic development, and increased safety in the neighborhood. One strategy that addresses those needs is to establish a business improvement district (BID). Chapter two provides information about the benefits and critiques of BID as well as their governing legislation.

Chapter 2 – Business Improvement Districts

2.1 Overview

One method to revitalize urban centers in light of the burden of decreasing state aid to local jurisdictions is to establish a business improvement district (BID). A BID is a geographic district where a majority of property owners agree to a special fee assessment to receive professional management services in addition to services already provided by the municipality. BIDs provide a long term funding source for professional management services aimed to enhance the economic vitality of a downtown or neighborhood center that exclusively address the needs of the business owners in the BID. BID services are typically provided by a newly created BID organization or an existing neighborhood organization that is a separate entity from the municipality. The most comprehensive and widely used definition of a BID comes from Lawrence Houstoun's *BIDs: Business Improvement Districts* (1997, 9):

> "A business improvement district (BID) is an organizing and financing mechanism used by property owners and merchants to determine the future of their retail, commercial and industrial areas. The BID is based on state and local law, which permits property owners and merchants to band together to use the city's tax collection powers to assess properties, thereby creating a reliable, multi-year source of funds for economic development. These funds are collected by the city and returned in their entirety to the BID and are used for supplemental services (maintenance, sanitation, security, promotions and special events) and capital improvements (street furniture, trees, signage, special lighting) beyond those services and improvements provided by the municipal government. In essence, the program is one of self-help through self-assessment and business-led management."

The purpose, organization, and management of BIDs blur the lines of public and private domains. Morçöl and Wolf (2010, 908) use four different conceptualizations to summarize literature on the structure of BID organizations that include: "public-private partnerships, tools of government policies, quasi-governmental entities, and private governments". Morçöl and Wolf's own characterization of BIDs is that they are actors in urban governance networks with three important attributes: they are autonomous from governments, exist in relationships with other governments, and participate in collective action to determine policy goals in urban areas (2010, 909). In other words, BIDs are non-profit government organizations that are neither a public nor private agency but do engage in relationships with various public and private agencies to establish, organize, and manage the BID. The role of the municipality is to legally set up the BID, collect the special fee assessments, and then transfer those funds over to the BID organization to be used (Mitchell 2001, 116). BIDs use private funds raised through special fee assessments to address the need of businesses while at the same time creating public benefits though creating more vibrant, safer, and cleaner commercial centers.

In the 1960s and the 1970s many downtown revitalization strategies were implemented through urban renewal projects financed by federal and state grants that were dispersed mainly to city planning departments. Under these grants, strategies in large cities involved removing old buildings, constructing large traffic thoroughfares, and building large office towers (Mitchell 2001, 115). "New" downtown revitalization processes involve private funding and public-private partnerships that aim to preserve historic features, enhance small businesses, expand pedestrian access, and improve the

cleanliness and safety of neighborhood centers (Mitchell 2001, 115). The BID concept has become a private-public partnership solution to address urban problems.

Significant accomplishments can be made when business and property owners work cooperatively to assess themselves for what future capital improvements and services are needed (Vivaldi 2003, 29). Establishing a BID gives individual business and property owners a collective voice on issues that affect the physical and business environment of the BID (Houstoun 1997, 12). Davis Square would benefit by having a predictable and steady funding source for public maintenance, district wide marketing, parking management, technical assistance for economic development, and public safety.

2.2 Critiques of BIDs

Although BIDs have been successful there are some limitations to be aware of. One critique of BIDs is that they become over managed and exist for the sole purpose to increase profit margins for area businesses (Batchis 2010, 98-99). Batchis explains that over management could lead to public spaces feeling like outdoor shopping malls with large national retail chain centers that then strip the original character from the neighborhood and fail to serve public purposes. Opponents to BIDs also challenge the democratic nature of BIDs because they may instill a sense of fear in neighboring residents because they may feel underrepresented due to potentially being overshadowed by the BID organization (Hoyt and Gopal-Agge 2007, 954 and Batchis 2010, 99). Critics of BIDs also question whether increasing levels of public service into a particular district violate the norm

of equitable public service distribution (Briffault 1999, 455). Perhaps business owners, property owners, or residents living just outside of a BID may feel as if they have less of a voice to advocate for their needs due to feeling overshadowed by the BID. Other limitations to the establishment of BIDs are opposition from public safety unions, reluctance of property owners to join, and the need for a large property owner to sign on early and enthusiastically. In response to critiques of BIDs, Batchis (2010, 100) discusses the benefits:

> "In the case of BIDs that serve the commercial heart of a city, BID benefits might arguably "trickle-down" to other parts of the city and region: By making the downtown business district more attractive and competitive, BIDs encourage job growth; by making the city a more attractive residential destination, BIDs might lead to increased property values throughout the city; and by improving the image of the symbolic heart of the region, the morale of all residents might receive a boost."

2.3 BID Legislation

Massachusetts General Law (M.G.L.) Chapter 40 Section O gives BIDs the authorization to perform various management, marketing, and economic development activities including maintenance, marketing, way-finding, hosting events, business services, capital improvements, physical upgrades, parking management, beautification, and other activities. In order for a particular district to be considered a BID, 75% of contiguous land must be zoned as commercial, retail, industrial, or mixed use. Residential land can be inside a BID boundary; however, the municipality has the authority to exempt owner-occupied residential properties. The formation of a BID is a public process initiated by property owners in the BID and requires a local petition as well as a public hearing process. Under M.G.L

Chapter 40 Section O, in order for a BID to be established at least 60% of the real property owners and owners of at least 51% of the assessed valuation of the real property in the proposed district must sign a petition to approve the BID. The signed petition must include a delineated boundary, a proposed improvement plan, a budget, and assessment/fee structure.

BIDs in Massachusetts became effective in 1995. At the time, the legislation included an opt-out clause that allowed property owners in a BID to opt out from paying the fee. However, in 2012 the Commonwealth of Massachusetts amended M.G.L Chapter 40 Section O and removed the opt-out clause. Under the amended legislation the BID fee became mandatory for all property owners in the district the next time a BID is renewed, unless members vote to dissolve the BID. A property owner may be exempt from the fee due to being categorized as a tax-exempt property or expressing that the fee is a severe financial hardship. The amended legislation has resulted in two property owners filing a law suit against the Northampton BID claiming that the legislation is unconstitutional (judgment has yet to be determined at the time of this publication).

The methods in which BIDs collect special assessments vary throughout the nation due to differences in state legislation and districts themselves. The Commonwealth of Massachusetts General Laws Chapter 40 Section O specifies that BID assessments can be based on a combination or one of the following: different levels of varying classifications of real property, benefit zones (location), assessed valuation, square footage, street frontage, or any other formula that meets the objective of the BID. As noted earlier, The Commonwealth of Massachusetts

requires that the total fees assessed in any one year do not exceed one-half of one percent of the sum of the assessed valuation of the real property in the whole district. Assessments are often based on the assessed valuation of a particular property (Houstoun 2011, 84). The Commonwealth of Massachusetts also grants BID organizations the option to limit or cap the maximum annual fee collected from individual properties or the total annual revenue generated by the BID. A discussion of Houstoun's (2003) thoughts on different types of assessment methods is provided in Appendix A.

Chapter 3 will discuss this project's methodology on how information will be gathered and analyzed in order to understand how a BID can be established in Davis Square.

Chapter 3 – Methodology

3.1 Introduction

The process of conducting an implementation study of a business improvement district in Davis Square involves qualitative and quantitative research methods. The aforementioned results from the *Somerville by Design: Davis Square* initiative was analyzed by OSPCD planning staff. Results of the survey determined the types of services that this implementation study researched for a potential Davis Square BID. Research of case studies was conducted of other BIDs that provide similar services to those expressed in the survey and have a similar district size, character, and total BID revenue. The goal of the case study research is to understand the cost and implementation of particular services and improvements in order understand how they could be implemented in a BID for Davis Square. Research from case studies provides examples of different assessment techniques in order to determine how much revenue can be raised in a potential Davis Square BID to offset the cost of services. Personal communication was conducted with BID directors and managers to gain an understanding about formation procedures, assessments, and management practices. Property tax information was used with a geographical information system (GIS) to understand Davis Square's tax base, land use, and business make up to create a boundary and analyze different assessment scenarios.

3.2 Survey Results

Typically a researcher would assess the strengths, weaknesses, opportunities, and threats (SWOT analysis) of a particular district to determine the scope of services of a prospective BID. In this case, planning staff from the OSPCD conducted a SWOT analysis in 2010 with local stakeholders in Davis Square. Survey results from the *Somerville by Design: Davis Square* initiative indicate that stakeholders in the neighborhood would like to see the following:

- Physical maintenance (waste management, sidewalk cleaning, rodent control, landscaping)
- Marketing (promotion, district branding; event management, way-finding, signage, greeters)
- Parking management (pricing strategies, shared-use arrangements, valet services)
- Economic development technical assistance (storefront improvements, business recruitment, tenant-landlord matching)
- Public Safety (security guards, public assistance officers)

3.3 Case Studies

There are currently seven BIDs in the Commonwealth of Massachusetts. They are located in Downtown Boston, Springfield, Amherst, Northampton, Hyannis, Taunton, and Westfield. The geographic context, land area, establishment, structure, budget, types of services/improvements, assessment formula, and management of these BIDs was researched to serve as precedents for how a BID could be implemented in Davis Square. Amherst and Northampton serve as comparable case studies for Davis Square due to their size, character, high presence of arts, colleges, and locally owned

businesses as well as the services they provide. While conducting the case study research, professionals with experience organizing and managing BIDs were contacted.

3.4 Implementation

The qualitative and quantitative research methods outlined above were used to determine a preliminary scope of services and improvements provided by a potential BID in Davis Square. Case study research and interviews helped understand the practicality of having a BID provide services in addition to those already provided by the City of Somerville. In addition to case study research and conversations with BID directors, a geographic information system (GIS) was used to analyze the land use and tax base in Davis Square to research different assessment scenarios. Understanding the land use of Davis Square was imperative to creating a boundary in order to adhere to regulations set forth by M.G.L c. 40O §1.

Chapter 4 – Examples of Business Improvement Districts

This chapter presents common characteristics of BIDs in the United States and highlights BIDs with similar characteristics and challenges to Davis Square to serve as a guide for the implementation of a BID in Davis Square. This chapter informs property owners of the types of services that different BIDs offer and could be offered in Davis Square. Two of the seven BIDs in Massachusetts are highlighted to emphasize services that are common in New England city centers.

4.1 Characteristics of BIDs

Jerry Mitchell, an Associate Dean and Professor at Baruch College of The City University of New York, has studied BIDs throughout the United States. Through his research, Mitchell believes there are five important characteristics that are common in all BIDs. The first is that BIDs are authorized by state legislations that grant local governments authority to create them. Legislation varies slightly between states but most statues specify how funds are collected, the types of services that are to be performed, the size and structure of the governing board, and the methods for property owners to petition their local government to enact a BID (Mitchell 2001, 117). Another difference between states' BID legislation is the terminology used for BIDs. In Iowa such organizations are referred to as self-supporting districts, New Jersey calls them special improvement districts, Missouri refers to them as special business districts, and

the State of Oregon calls these types of organizations economic improvement districts (Mitchell 2001, 117).

The second common characteristic amongst BIDs is that are typically established though a petition process in a business district with defined boundaries. Having defined boundaries ensure that property owners outside the district who aren't paying the special assessed fee are not receiving free services. BID boundaries ensure that paying property owners are getting the most efficient services for their dollar. Mitchell notes that BIDs are usually established by efforts made by real estate developers, property owners, merchants, downtown associations, or the local government itself. In order for a BID to be enacted, a certain percentage of property owners in the district must approve it. The exact percent of property owners needed varies by state and ranges from 51% - 70% (Mitchell 2001, 117). As noted earlier, in Massachusetts 60% of the real property owners and owners of at least 51% of the assessed valuation of the real property in the proposed district must approve to establish a BID.

The third similarity amongst BIDs is that they all receive revenue from a special assessment fee on property owners and/or business owners in the boundary of the district. These assessments are mandatory unless a particular property is exempt from the assessment or an agreement has been made between the BID organization and certain property owners. Statutory requirements vary across states regarding assessment exemptions for specific types of properties. The Commonwealth of Massachusetts requires that the total fees assessed in any one year do not exceed one-half of one percent of the sum of the assessed valuation of the real property in the whole district. In Massachusetts the municipality may exempt owner-occupied

residential, agricultural, and/or tax exempt properties. In addition to special assessments, BID management entities are authorized to receive grants, donations, and gifts on behalf of the BID.

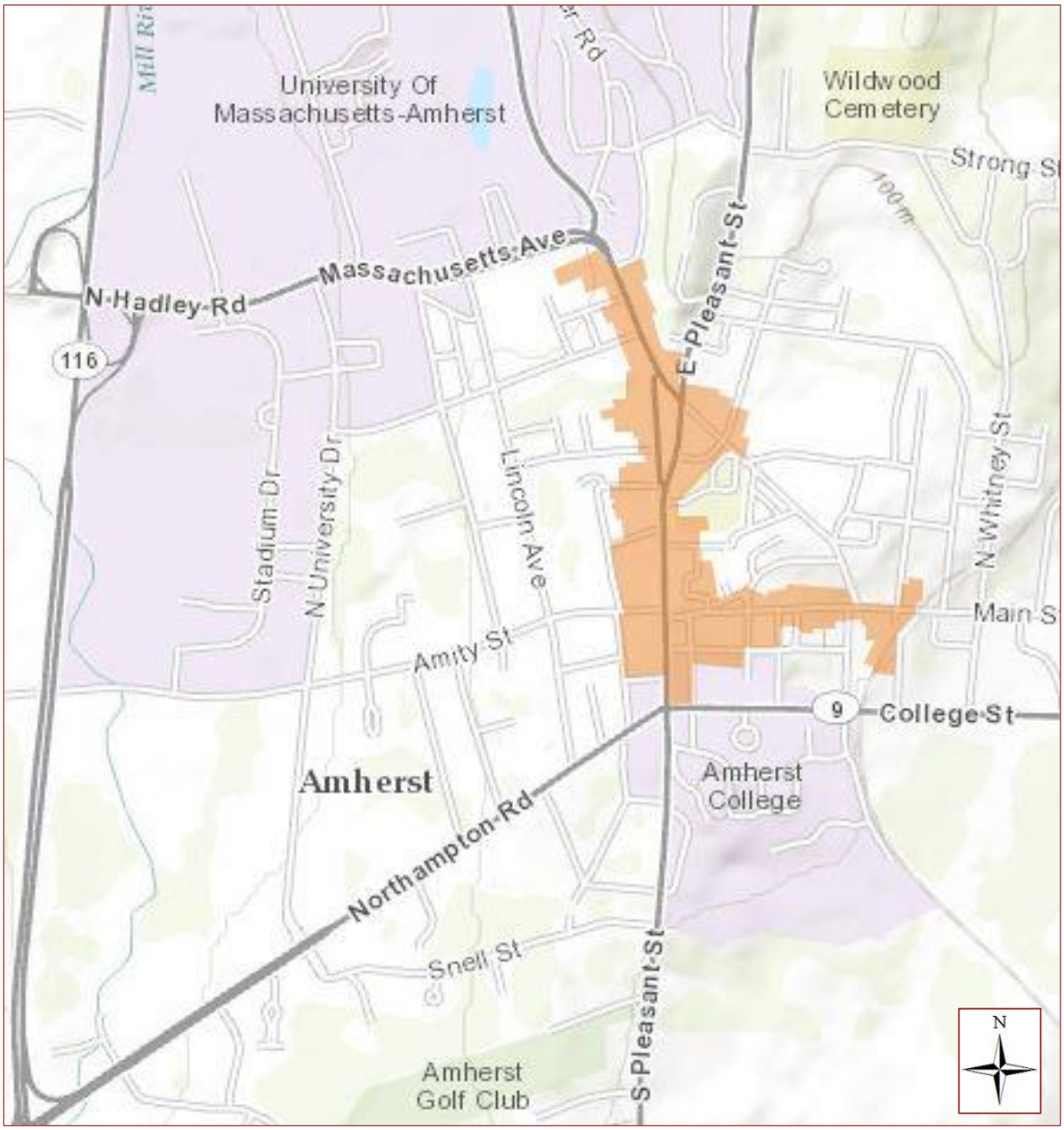
The fourth common characteristic of BIDs is that they are established as a nonprofit organization, government agency, or public-nonprofit partnership. In some cases a BID organization has evolved from being a voluntary business or neighborhood association into a nonprofit organization (Mitchell 2001, 118). A BID operated as a nonprofit organization, government agency, or public-nonprofit partnership would be required to register as an enterprise with the Internal Revenue Service (IRS) since they are a business entity (Vivaldi 2003, 35).

The fifth similarity amongst BIDs is that they all focus on what is most effective for the business district. The governing board of a BID is usually comprised of property and business owners and oversees the district to ensure accountability, establish a direction for its activities, and select a manager to run the BID. The local government itself plays a minor role in the day-to-day operations of the BID except to approve the districts renewal and monitor expenditures (Mitchell 2001, 118). The Commonwealth of Massachusetts requires that BIDs have their improvement plans renewed by the municipality every five years. The renewal process allows property owners to reassess whether the BID is actually working and propose changes to services or the fee structure.

4.2 Amherst, Massachusetts

The Amherst BID was approved by the Amherst Select Board in October of 2011 and is Massachusetts's most recent BID.

Figure 3: Amherst BID



Source: Environmental Systems Research Institute (ESRI). (2014).

Amherst is home to roughly 38,000 people[5] and is well known for its large college-aged population from Amherst College, the University of Massachusetts Amherst (UMass), and Hampshire College. Similarly to Davis Square, Downtown Amherst serves practical functions for dining, entertainment, professional services, and personal services for a wide range of populations. The Amherst BID (highlighted as orange in Figure 3) is flanked on two sides by the UMass campus to the north and the Amherst College campus to the south. There are 102 properties in the BID, which includes parcels that have potential for redevelopment in the future. By including such properties, that ensures more revenue for the BID in the event that infill redevelopment does occur.[6]

Services

The Amherst BID is managed by a nonprofit economic development organization made up of local property owners, merchants, and residents who are dedicated to provide programs and services to the town's residents and businesses (www.AmherstDowntown.com). The BID organization partners with the Town of Amherst, UMass, and Amherst College to help achieve the goal of making downtown a destination for visiting, doing business, and living. The BID is focused on building upon the "Amherst brand" as a quintessential New England college town. In order to meet those goals the Amherst BID hosts events, conducts beautification projects, provides marketing, and implements special projects to benefit the district and its visitors. BID

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[5] According to the 2010 Decennial Census, Amherst had a population of 37,819.

[6] Sarah la Cour (Executive Director, Amherst BID) in discussion with the author, April 2014.

decisions are made by a 13 member board made up of business owners, property owners, professionals, residents, a town official, and one official from UMass and one from Amherst College. The Board is further divided into committees that focus on particular elements of the BID.

Figure 4: BID Maintenance Program

Source: Josh Kuckens. (2012). Amherst Bulletin.

The BID enhances beautification from increased levels of seasonal and targeted maintenance to create a cleaner shopping and dining experience. Increased landscaping and decorative lighting enhance the downtown's aesthetic quality to create a comfortable environment for all hours of the day. In addition to maintenance, landscaping, and lighting, the BID conducts bi-weekly sidewalk cleaning, targeted snow removal, and graffiti removal. Maintenance services cost the BID $30,000 per year. The BID has a contract for those services with the First Baptist Church, Amherst, which then hires homeless individuals to perform the services.

Marketing and business development services are provided by the BID through emphasizing the district to potential businesses and customers. The BID conducts market research and analysis to attract new businesses to the district that support the "Amherst brand" and work with the Town to create a streamlined permitting process. The BID hosts cultural and entertainment attractions in the district through special

events, festivals, and an annual block party to enhance the district's liveliness while highlighting the district's local businesses. The BID also manages a website that includes a comprehensive listing, sorted by business type, of all the businesses in the district.

Figure 5: Amherst BID Block Party

Source: Amherst BID. 2012 Downtown Block Party.

The BID partners with the Town in order to make capital improvements in the district. The BID staff advocates for policy changes and infrastructure needs of BID property owners to ensure that policies and projects will enhance the physical environment, quality of life, and economic development of the BID.

BID Revenue

In fiscal year 2014 the Amherst BID's total revenue was $295,000, which was collected from assessments and payments under memorandums of understanding. In order to pay for the aforementioned services and prospective improvements property owners in the BID are assessed fees based upon the following formulas:

- Commercial Properties – .05% of the assessed value
- Mixed Use Properties – .05% of the assessed value for the commercial portion and .01% of the assessed value for the residential portion
- Publically Owned Properties – Memorandum of Understanding
- Non-Profit / Educational Properties – Memorandum of Understanding
- Hotels/Inns - $200 per room per year
- Single-, Two-, and Three-Family / Residential Condos – Exempt

Conclusion

Since its inception in 2011, the Amherst BID has been highly regarding in Town. In November of 2013, the BID renewal vote passed 43-1. With a 98% percent approval rating to renew, the BID is able to continue performing services and improvements to the district. One of the most successful services provided by the BID is the maintenance service. Depending on the season, BID staff can be seen on a daily basis cleaning sidewalks, pre-treating the sidewalks to prevent icing, or watering plants. With the renewal, the BID is able to continue decorating lampposts downtown for the holiday season and hosting 5k running events, block parties, and various events on the Town Common.

4.3 Northampton, Massachusetts

The Northampton BID began operating in 2008. Its initial goal was to address maintenance and beautification in downtown to promote a clean and safe environment and to address the lack of upkeep and vacant storefronts. One of the main reasons for property owners to initiate a BID was to undertake a strategy that ensured downtown Northampton's prominence as a destination (NBID 2007, 6). In addition to maintenance and beautification programs the BID has evolved to include public safety, marketing, capital improvements, hospitality, and parking/transportation services. Similarly to Davis Square, Northampton has a vibrant community of college students, diverse restaurants, energetic nightlife, and numerous locally owned restaurants.

Services

The Northampton BID has a strong relationship with the City of Northampton and Smith College, who owns property in the BID. The City of Northampton and the BID organization have agreed to enter into a Memorandum of Understanding (MOU) where there is an agreed baseline of services that the city provides to the BID. The MOU agreement includes the following baseline services and financial payments to the BID (NBID 2012, 4):

- Provide funding for the BID at $35,000 annually
- Provide financing for capital equipment for maintenance programs
- Provide dedicated police patrol with the BID
- Provide municipal Department support for BID events
- Negotiate snow removal policies
- Multi-year capital program for street, sidewalk and park improvements
- Plant Street Trees
- Support for the Academy of Music
- Provide district billing and collection at no cost to the BID

In addition to services provided by the city under the MOU, the BID organization hires staff to perform the following services exclusively in the district (NBID 2012, 4-6):

Maintenance and Beautification

- Conducts Spring Cleanup program
- Sweeps sidewalks, removes graffiti, and cleans tree wells daily
- Plants, waters, and maintains landscaping, hanging baskets, and planting containers
- Operates power washers, mechanical sweepers, and gum removers
- Coordinates with the city to plant trees
- Provides excess snow removal

Figure 6: BID Maintenance Program

Source: (Left) – *Kevin Gutting. (2013). Amherst Bulletin.*

(Right) - *Jerry Roberts. (2013). Amherst Bulletin. Daily Hampshire Gazette.*

Marketing

- Branding for the district
- Host events: Restaurant Week, Winter Lights Festival, Sidewalk Sales, Art Festivals, and First Night Fireworks
- Provides public relation services
- Maintains a website and social media platforms that highlight members of the BID each month

Figure 7: Branding / Restaurant Week

Northampton
RESTAURANT WEEK

Source: *www.northamptonrestaurantweek.com*

Public Safety

- Promotes homeless services and public safety initiatives
- Provides downtown with social service efforts

Capital Improvements

- Improves pedestrian access

- Improves sidewalks and crosswalks

Hospitality Guide Program

- Provides trained guides that offer general information
- Provides homeless visitors with access to appropriate social service agencies

Parking and Transportation

- Improves parking signage
- Provides advocacy for BID members regarding municipal parking policies

BID Revenue

The Northampton BID's revenue for fiscal year 2014 totaled $409,000, which was generated from assessments, memorandums of understanding, merchant fees for events, and contributions from non-members.[7] Despite a pending lawsuit from two BID members, the Northampton City Council approved a petition to amend the assessment structure in order to decrease the fees for property owners. The BID's assessment structure is as follows:

- Commercial Properties – 0.25% of the assessed value
- Residential Buildings – $50 per residential unit plus $0.50 per square foot of commercial space
- Single Purpose Entertainment/Cultural Venues – 0.25% of the assessed value
- Publically Owned and Tax Exempt Properties – negotiated fee agreements of cash contributions or in-kind services
- Hotels/Inns - 0.25% of the assessed value
- Single Family Residence – Exempt

[7] Natasha Yakovlev (Interim Director, Northampton BID) in discussion with the author, April 2014.

Conclusion

Since its creation in 2008, the Northampton BID has painted 47 antique lamp posts, maintained 47 flower planters, and maintained 96 hanging flower baskets. The BID has also installed lights under the railroad bridge to improve pedestrian safety at night. BID staff also ensures that sidewalks are clean seven days a week, removes snow within two hours of any snow storm, prevents icing, removes weeds from the sidewalks and tree wells, removes graffiti, and power washes the sidewalks throughout town. The BID also hosts a website, www.northamptondowntown.com, which provides a directory of all the businesses in the district.

4.4 Conclusion

This chapter discussed common characteristics of BIDs in the United States and presented information about BIDs in Amherst, Massachusetts and Northampton, Massachusetts. The characteristics that were highlighted include: BID legislation, establishment procedures, revenue sources, organization structure, and goals. The presentation of Amherst and Northampton discussed their assessment methods and highlighted the services the offered. Amherst, which is slightly small than Northampton and Davis Square, offers their members services that focus on marketing and maintenance. Similarly, Northampton has been most successful with its maintenance, beautification, and marketing services.

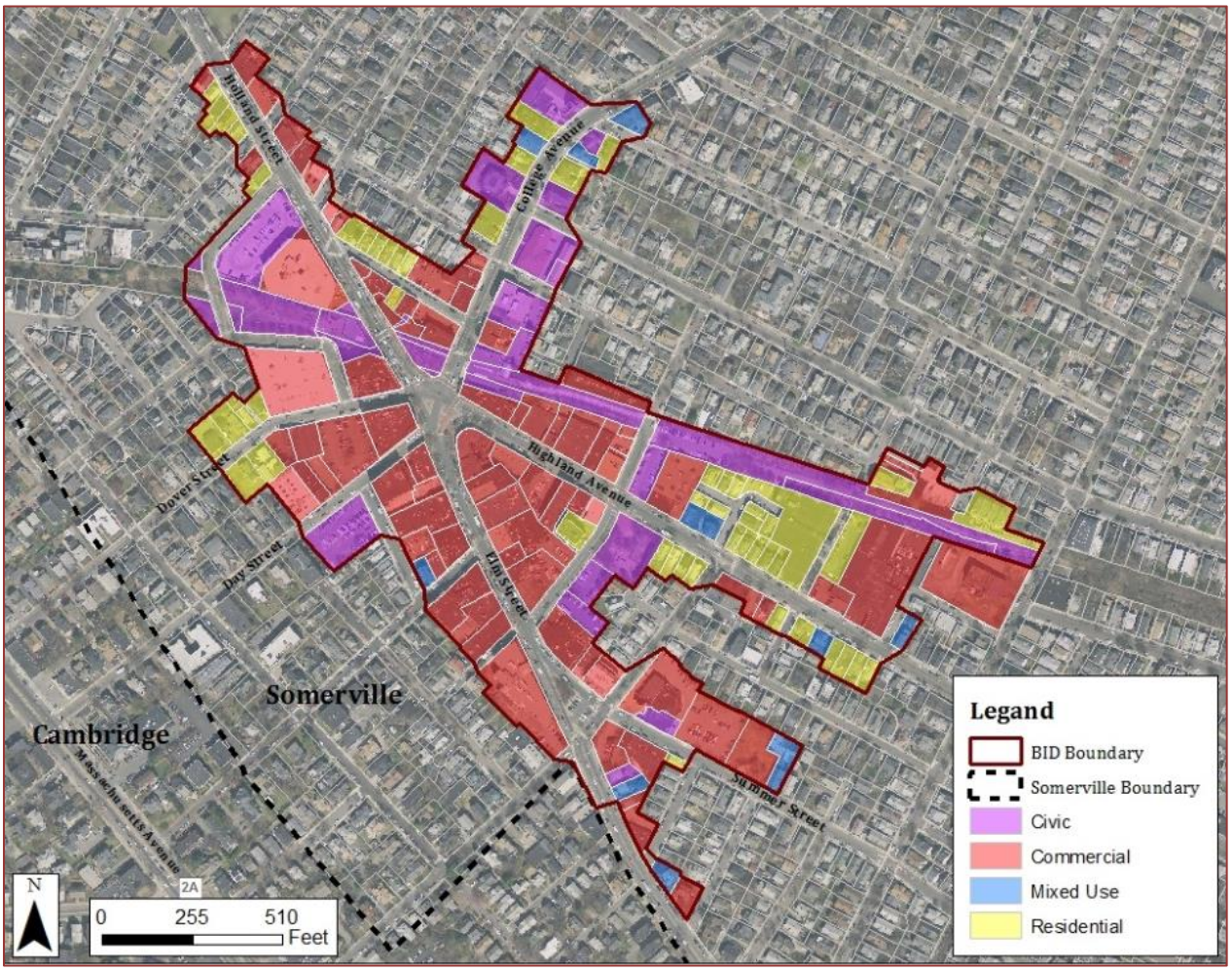
Chapter 5 – Implementation in Davis Square

This chapter uses information from Amherst and Northampton to develop a potential boundary, assessment structure, and service schedule for Davis Square. The boundary was developed adhering to state law and includes Davis Square's commercial core and commercial uses in its periphery. An assessment structure is presented to estimate two different amounts of expected revenue for Davis Square. Furthermore, this chapter features a supplemental service schedule for Davis Square that offers similar services to those offered by Amherst and Northampton while addressing the needs expressed by Davis Square stakeholders.

5.1 Boundary

State law requires that the boundary of a BID be one contiguous geographic area with clearly defined boundaries in which at least 75% of the area is zoned or used for commercial, industrial, retail, or mixed uses. A potential boundary was created (see Figure 8) that includes the heart of Davis Square (intersection of Highland Avenue, Elm Street, Holland Avenue, and College Avenue) and extends to commercial properties on the periphery. The boundary includes one contiguous geographic area in which approximately 83% percent of the land area is in either the Central Business District (CBD) or a Neighborhood Business (NB) district, both of which are zoned for

Figure 8: Davis Square BID Boundary



commercial, retail, and mixed use. The district also includes properties in Residence A (RA), Residence B (RB), Residence C (RC), and Open Space (OS) districts that make up approximately 17% of the land area. Residential properties were included in order to extend the boundary to include large commercial properties such as 363 Highland Avenue to the east and to include large apartment buildings on Dover Street.

The boundary represented in Figure 8 could change as the implementation process moves forward. It is possible that more property owners outside of the boundary would want to be included. On the contrary, property owners in the

boundary may have no desire to join the BID therefore the BID boundary may have to be altered to include enough interested property owners to get a petition approved.

5.2 Expected Revenue

This analysis uses an assessed valuation method due to its simplicity, easy understanding, and equitability. Also, the assessed value method is comprehensive and takes into account numerous variables such as, property value, location, lot size, building size, and improvements. The following assessment fee structure (Table 1) is based upon similar strategies in Amherst and Northampton.

Table 1: Assessment Fee Structure

Use Classification	Fee Formula
Mixed use and Commercial	0.25% of assessed value
Residential (greater than 3 units)	$200 per unit
Hotel	$200 per room
Civic Uses	Exempt

The estimated amount of revenue that a BID with a boundary presented in Figure 8 could generate from the assessment fee structure in Table 1 is approximately $538,921. There is potential for more revenue to be generated through higher assessments, memorandum of understanding with the City of Somerville, investments, and grants. Changing the mixed use and commercial fee formula to 0.5% of the assessed value would generate approximately $1,065,000 in revenue. However, M.G.L Chapter 40O limits the total amount of fees that can be assessed by a BID to not exceed one-half of

one percent of the sum of the assessed valuation of the real property owned by participating members in the BID district, which would equal approximately $1,161,000. A participating member is one who pays the assessed fee whereas a non-participating member is one who is exempt from the assessed fee. For example, a single family home owner would be a non-participating member; therefore, their assessed value would not affect the limit of total fess collected from assessments. Civic uses that are exempt include land owned by the City of Somerville or Somerville Housing Authority such as the bike path, library, parks, and the Ciampa Manor (housing for elderly and disabled residents). Also, land owned by the MBTA is also considered as a civic use and would be exempt from paying an assessment fee. Of the 177 properties in the proposed boundary, 79 would be exempt from the fee (45%).

5.3 BID Services

Baseline Services

It is common for BIDs to enter into a memorandum of understanding with the municipality and other institutions in the BID such as churches, transportation authorities, and educational institutions. A memorandum of understanding between the BID and the Town defines the municipality's baseline of public services that currently exist in the proposed BID. Such an agreement prevents the current public services from being replaced or duplicated by the BID. It also ensures that the BID is providing services that are supplemental to those provided by the municipality. A memorandum of understanding in Davis Square may address establishing a baseline for

trash and snow removal services, landscaping, street sweeping, and sidewalk repair/reconstruction. It could also address the municipality's financial support for the BID as well as marketing and promoting the district.

Supplemental Services

As previously mentioned, one of the main purposes of a BID is to provide services in a district that are supplemental to those already provided by the municipality. Table 2 displays a supplemental service schedule for a potential BID in Davis Square. The table displays how the particular service could be implemented and the benefit of providing such service. The benefits reflect those of the BID organization, BID members, merchants, the district, and the municipality as a whole.

Table 2: Supplemental Service Schedule

Maintenance	Implementation	Benefit
Waste management	The BID could hire its own maintenance crew or contract with a private maintenance company to empty trash and recycling receptacles in addition to the DPW current service level.	The district receives more frequent trash pickup and enhances the cleanliness and aesthetic quality of the district.
Rodent control	In addition to rodent control provided by Inspectional Services and the DPW, the BID could conduct some of their own strategies.	Limits the amount of rodents in the district and enhances the cleanliness, public safety, and aesthetic quality of the district.
Landscaping	The BID maintenance crew can also perform landscaping services by installing and maintain hanging flower pots and other aesthetically pleasing landscape features.	Enhances the cleanliness and aesthetic quality of the district.

Marketing	Implementation	Benefit
District branding	The BID could work with merchants and property owners to develop a brand in the form of a logo, slogan, website, social media campaign, and/or clothing.	The district is able to be marketed more easily and effectively by having an established identity and media presence.
Restaurant week	The BID could work with restaurant owners by offering customers discounts during a specific week (or multiple) during the year.	More visitors and local stakeholders are attracted to the district that would not have otherwise come. Also, the districts identity as a premium restaurant destination is enhanced.
Way-finding	Install sings directing district visitors to particular areas of interest deemed important by local merchants, property owners, and residents. The BID could also hire an ambassador that verbally interacts with visitors to provide information about the district and the community.	Provides direction for visitors to key community and cultural resources in the district and throughout the city that they may not have otherwise had knowledge about.

Parking and Transportation	Implementation	Benefit
Parking research	BID staff or a consultant can conduct research on how to best address parking issues raised by merchants and property owners within the district.	Creates less parking congestion in the district.
Facilitator for share-use arrangements	BID staff could work with merchants and property owners to conduct an inventory of unused parking spaces.	Creates less parking congestion in the district.
Valet services	BID staff could perform valet services or contract with a private company and work the municipality to designate a parking area in a municipally owned lot for valet services.	Creates less parking congestion in the district and generates revenue for the BID organization.
Pedicab	BID could buy a pedicab to serve as an alternative method of transportation and serve an entertainment function to travel from popular destinations in the district and throughout the city.	Provides an alternative method of transportation and entertainment function for traveling within the district and throughout the city. There is also potential to generate revenue for the BID.

Economic Development & Technical Assistance	Implementation	Benefit
Storefront Improvement assistance	BID staff could serve as a facilitator to help merchants take advantage of municipal programs.	Dilapidated or outdate storefronts are improved.
Business Recruitment	BID staff can recruit businesses to fill vacancies.	Vacant storefronts and office space is filled.
Tenant-landlord matching	BID staff could find tenants with specific needs and landlords that can accommodate those needs.	Prospective tenants with specific needs relocate to the district.
PILOT Program	BID and/or the municipality could offer a payment in lieu of tax (PILOT) incentive for property owners that undertake large redevelopment projects.	Redevelopment occurs that may not have otherwise occurred.

5.4 Business Improvement District Petition

The next steps in the process of establishing a BID in Davis Square requires city planning staff to work with property owners and merchants in the proposed district to evaluate the interest level in proceeding with a formal BID petition to Somerville's governing body, the Board of Alderman. M.G.L Chapter 40O §3 requires that all BID petitions are initiated by property owners. Such petitions shall contain:

> "(1) the signatures of the owners of at least fifty-one percent of the assessed valuation of all real property within the proposed BID and sixty percent of the real property owners within the proposed BID;
>
> (2) a description of and a site map delineating the boundaries of the proposed BID;
>
> (3) the proposed improvement plan which shall set forth the supplemental services and programs, revitalization strategy, update mechanism, and budget and fee structures;

(4) the identity and location of the management entity designated to implement and oversee the ongoing improvement plan; and

(5) the criteria for waiving the fee for any property owner within the BID who can provide evidence that the imposition of such fee would create a significant financial hardship."

M.G.L Chapter 40O §4 requires that the Board of Aldermen hold a public hearing within 60 days of the receipt of a petition. At such hearing, the Board of Alderman will have to determine if the petition satisfies the purposes set forth and the establishment criteria of M.G.L Chapter 400. If the Board of Alderman cannot determine that the petition satisfies the purposes set forth and the establishment criteria of M.G.L Chapter 400 the petition shall be dismissed.

M.G.L Chapter 400 §4 also requires that BIDs go through a renewal process within, at most, every five years. The renewal process includes a renewal meeting hosted by the BID Board of Directors or management entity with BID members to review the preceding five-year history of the BID, propose an updated improvement plan, and to consider whether to continue the BID. The BID shall continue after each renewal meeting if a majority of participating property owners vote to renew the BID. If eligible participating property owners decide to not renew the BID then the BID shall dissolve within six years of its creation or of the prior renewal vote.

Chapter 6 – Conclusion

The need for creative economic development strategies is crucial due to municipalities receiving less aid from the Commonwealth while facing the lingering effects of suburbanization. Davis Square has remained vibrant throughout the recent economic recession by attracting high quality restaurants; however, there are certain elements of the district that community stakeholders have expressed a concern about. Davis Square could lose some of its vibrancy if investment doesn't occur in the neighborhood. The dynamics of Davis Square needs adapt to current downtown trends in order to compete with other regional commercial centers or else potential visitors will shop elsewhere. Throughout various planning processes stakeholders have expressed a desire for more maintenance and landscaping, long range economic development planning, updated storefronts, and efficient parking solutions. This report studied how a business improvement district (BID) could be implemented in Davis Square as a private-public solution to revitalize Davis Square.

As seen with this research, a BID in Davis Square can generate similar, perhaps more, revenue than BIDs in downtown Amherst and Northampton. Due to geographical and cultural differences the types of services offered would differ so that the exclusive needs of Davis Square property and business owners are met. This research provides city planning staff, property owners, business owners, and local residents with examples, strategies, and regulatory information in order to work together to establish a business improvement district in Davis Square.

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Appendix A – Assessment Methods

The following discussion on various assessment methods for BIDs has been compiled from Lawrence Houstoun's *BIDs: Business Improvement Districts* (2003).

Assessed Valuation

Assessed valuation is easy to understand and is widely accepted as an equitable method for assessment. It can be easily calculated from municipal records and responds directly to improved property values, which can be considered one of the main benefits of a BID. Assessed value takes into account the variables of other assessment methods such as, property value, location, lot size, building size, and improvements.

Square Footage

Assessing properties in a BID based on square footage is easy to understand but there are some disadvantages. Basing a formula on building square footage leaves out properties that are unimproved. An unimproved property would be one that does not have utility access necessary for future improvements. Owners of properties that are unimproved would benefit from BID services in the form of appreciated property values but will not be paying as much as an improved property. Square footage assessments undervalue unimproved properties while fully developed properties share more of the BID's costs. Disputes could arise over a particular properties actual square footage if there is a discrepancy between the actual square footage and the useable square footage. This method also excludes important variables such as location and age of

improvements, which assumes that every square foot of commercial property in the district is of equal value.

Street Frontage

An assessment based upon the street frontage of a particular property is easy to understand and calculate. This method also has historical significance when properties were assessed by their street frontage for the installation of water and sewer systems, snow removal, sidewalk cleaning, and sidewalk reconstruction. However, basing an assessment on street frontage has potential to undervalue a particular property with a small amount of street frontage but is also deep and/or has multiple stories.

Location

An assessment based on location in a particular district assumes that properties in a closer proximity to a central location (i.e. a train station, landmark, or town common) receive greater benefits via services and therefore should pay more in assessments. However, this method is not well suited for most types of services such as, security, maintenance, and marketing because they are expected to be applied in a uniform manner throughout the district.

Use

A BID assessment can be based on the use of properties assuming that particular uses receive different benefits. This method allows BIDs to charge retail properties or hotel properties at a different rate if the BID offers programs that emphasize some land uses over others.

Appendix B – Potential BID Members

Number	Street	Owner	Total Assessed Value	Land Use	Fee if 0.05%	Fee if 0.025%
77	HOLLAND ST	GRASSI ARMANDO & ANGELINA TRSTS	$ 1,263,100	Commercial	$ 6,316	$ 3,158
89	HOLLAND ST	TRUST KENNEDY REALTY	$ 1,689,000	Commercial	$ 8,445	$ 4,223
75	HOLLAND ST	SCANDONE AMALIO & ALBANESE G TRS	$ 414,500	Commercial	$ 2,073	$ 1,036
57	HOLLAND ST	OSULLIVAN PATRICK J TRUSTEE	$ 913,800	Commercial	$ 4,569	$ 2,285
65	HOLLAND ST	O'SULLIVAN PATRICK J TRUSTEE	$ 1,322,400	Commercial	$ 6,612	$ 3,306
64	COLLEGE AVE	HOLY BIBLE BAPTIST CHURCH INC	$ 3,860,600	Civic	$ -	$ -
60	COLLEGE AVE	62 COLLEGE AVE TRUST LLC	$ 1,814,500	Residential	$ 2,200	$ 2,200
56	COLLEGE AVE	WON DONGJUN	$ 980,400	Mixed Use	$ 4,902	$ 2,451
50	COLLEGE AVE	ROGERS GORDON E	$ 750,200	Residential	$ -	$ -
40	COLLEGE AVE	CITY OF SOMERVILLE	$ 1,739,100	Civic	$ -	$ -
36	COLLEGE AVE	CHATHAM LIGHT REALTY CORP	$ 5,324,900	Residential	$ -	$ -
96	HOLLAND ST	KITMIRIDIS GEORGE & SOULA	$ 884,800	Commercial	$ 4,424	$ 2,212
92	HOLLAND ST	IOCABUCCI JOSEPH MARIO	$ 599,100	Residential	$ -	$ -
88	HOLLAND ST	MCEVOY ROBERT P	$ 756,400	Residential	$ -	$ -
82	HOLLAND ST	BASTAS NEAL ROBERT	$ 757,400	Residential	$ -	$ -
80	HOLLAND ST	COHEN MICHAEL B	$ 339,300	Residential	$ -	$ -
74	HOLLAND ST	GOLDIN SUSAN E	$ 1,132,800	Commercial	$ 5,664	$ 2,832
68	HOLLAND ST	BILIARDIS KATINA FOR LIFE	$ 733,400	Residential	$ -	$ -
40	HOLLAND ST	KADIMA MEDICAL PROPERTIES LLC	$ 33,681,300	Commercial	$ 168,407	$ 84,203
20	HOLLAND ST	MBTA	$ 349,600	Civic	$ -	$ -
56	HOLLAND ST	CITY OF SOMERVILLE	$ 5,578,600	Civic	$ -	$ -
56	HOLLAND ST	CITY OF SOMERVILLE	$ 5,578,600	Civic	$ -	$ -
61	MEACHAM RD	CITY OF SOMERVILLE	$ 520,700	Civic	$ -	$ -
61	MEACHAM RD	CITY OF SOMERVILLE	$ 520,700	Civic	$ -	$ -
0	MEACHAM RD	MBTA	$ 2,096,100	Civic	$ -	$ -
31	COLLEGE AVE	WEST SOMERVILLE BAPTIST CHURCH	$ 1,591,000	Civic	$ -	$ -
10	WINSLOW AVE	WEST SOMERVILLE BAPTIST CHURCH	$ 661,500	Civic	$ -	$ -
45	COLLEGE AVE	HAITIAN BIBLE BAPTIST CHURCH INC	$ 865,700	Civic	$ -	$ -
51	COLLEGE AVE	MEROLLA ANTONETTE FOR LIFE	$ 1,288,900	Residential	$ 1,200	$ 1,200
57	COLLEGE AVE	LOW JOHN R TRSTEE	$ 797,000	Mixed Use	$ 3,985	$ 1,993
63	COLLEGE AVE	RIVERSIDE COMMUNITY CARE INC	$ 763,800	Civic	$ -	$ -
5	HALL AVE	HALL AVENUE LLC	$ 786,100	Residential	$ -	$ -
71	COLLEGE AVE	MORAN JOHN F TRUSTEE	$ 715,500	Mixed Use	$ 3,578	$ 1,789
30	COLLEGE AVE	RIZKALLAH MOUHAB Z	$ 2,476,700	Commercial	$ 12,384	$ 6,192
20	COLLEGE AVE	NOLAN ROSEMARY TRSTEE	$ 1,096,000	Commercial	$ 5,480	$ 2,740
17	WINTER ST	KING ELIZABETH J FOR LIFE &	$ 764,800	Residential	$ -	$ -
19	WINTER ST	LACOURT REALTY LLC	$ 658,700	Residential	$ -	$ -
21	WINTER ST	BROWN JAMES W & JANE	$ 515,800	Residential	$ -	$ -
23	WINTER ST	SARKISIAN REBECCA TRUSTEE	$ 646,000	Residential	$ -	$ -
27	WINTER ST	ADAMS ROBERT E JR	$ 529,500	Residential	$ -	$ -
31	WINTER ST	SARKISIAN REBECCA TRUSTEE	$ 731,500	Residential	$ -	$ -
43	HOLLAND ST	43 HOLLAND STREET LLC	$ 769,600	Commercial	$ 3,848	$ 1,924
49	HOLLAND ST	CHERNIN DAVID A TRUSTEE	$ 251,300	Commercial	$ 1,257	$ 628
32	COLLEGE AVE	LACOURT REALTY LLC	$ 834,300	Commercial	$ 4,172	$ 2,086

27	COLLEGE AVE	SOMERVILLE HOUSING AUTHORITY	$ 5,682,800	Civic	$ -	$ -
17	COLLEGE AVE	CONNOLLY JOHN M & GAIL F TRS	$ 1,709,800	Commercial	$ 8,549	$ 4,275
0	DAVIS SQ	MBTA	$ 3,008,100	Civic	$ -	$ -
0	DAVIS SQ	MBTA	$ 3,008,100	Civic	$ -	$ -
48	GROVE ST	TRUST GROVE ST REALTY	$ 3,151,700	Commercial	$ 15,759	$ 7,879
399	HIGHLAND AVE	CENTRAL CO- OPERATIVE BANK	$ 1,863,500	Commercial	$ 9,318	$ 4,659
401	HIGHLAND AVE	SAMELLAS DEMETRA & OLEARY H TRS	$ 1,627,800	Commercial	$ 8,139	$ 4,070
403	HIGHLAND AVE	TRUST 403 HIGHLAND REALTY	$ 2,998,400	Commercial	$ 14,992	$ 7,496
403	HIGHLAND AVE	TRUST 403 HIGHLAND REALTY	$ 2,998,400	Commercial	$ 14,992	$ 7,496
407	HIGHLAND AVE	KOLOKITHAS EVANGELOS TRUSTEE	$ 1,143,300	Commercial	$ 5,717	$ 2,858
409	HIGHLAND AVE	TRUST SAMUEL BACKER INSURANCE	$ 1,567,100	Commercial	$ 7,836	$ 3,918
413	HIGHLAND AVE	SARAGAS S JOHN	$ 768,100	Commercial	$ 3,841	$ 1,920
1	COLLEGE AVE	MIDSHARES INC	$ 3,522,100	Commercial	$ 17,611	$ 8,805
418	HIGHLAND AVE	SAIA FAMILY STONEHAM LLC	$ 1,594,700	Commercial	$ 7,974	$ 3,987
233	ELM ST	DANA MYER R & ALAN G DANA TRUSTEES	$ 2,131,000	Commercial	$ 10,655	$ 5,328
243	ELM ST	DANA MYER R & ALAN G TRUSTEES	$ 1,059,500	Commercial	$ 5,298	$ 2,649
245	ELM ST	DANA MYER R & ALAN G TRSTEES	$ 3,145,600	Commercial	$ 15,728	$ 7,864
255	ELM ST	MISUJO REALTY LLP	$ 4,539,000	Commercial	$ 22,695	$ 11,348
261	ELM ST	ERRICO PAUL R & JOSEPH F TRSTEES	$ 2,971,300	Commercial	$ 14,857	$ 7,428
5	DAVIS SQ	5 DAVIS SQUARE LLC	$ 3,235,100	Commercial	$ 16,176	$ 8,088
408	HIGHLAND AVE	MIDDLESEX BANK NA	$ 1,988,800	Commercial	$ 9,944	$ 4,972
402	HIGHLAND AVE	ARON LIMITED PARTNERSHIP	$ 3,755,800	Commercial	$ 18,779	$ 9,390
400	HIGHLAND AVE	400 HIGHLAND AVE LLC	$ 1,330,000	Commercial	$ 6,650	$ 3,325
396	HIGHLAND AVE	IZEDIAN RAMESH TRUSTEE	$ 1,048,500	Commercial	$ 5,243	$ 2,621
20	GROVE ST	20 GROVE STREET LLC	$ 2,156,200	Residential	$ 2,200	$ 2,200
29	HOLLAND ST	BLUMSACK DAVID E TRUSTEE	$ 998,800	Commercial	$ 4,994	$ 2,497
27	HOLLAND ST	DELELLIS CARLA TRUSTEE	$ 1,420,300	Commercial	$ 7,102	$ 3,551
16	WINTER ST	TRUST SALVATORE SILLARI FAMILY	$ 820,400	Residential	$ -	$ -
12	WINTER ST	NOLAN ROSEMARY TRSTEE	$ 1,226,100	Commercial	$ 6,131	$ 3,065
35	DAVIS SQ	NOLAN ROSEMARY TRSTEE	$ 2,229,900	Commercial	$ 11,150	$ 5,575
10	COLLEGE AVE	MBTA	$ 336,600	Civic	$ -	$ -
3	HOLLAND ST	NOLAN ROSEMARY TRUSTEE	$ 1,774,600	Commercial	$ 8,873	$ 4,437
5	HOLLAND ST	DELELLIS CARLA TRUSTEE	$ 1,137,500	Commercial	$ 5,688	$ 2,844
45	DAVIS SQ	MBTA	$ 1,248,000	Civic	$ -	$ -
49	DAVIS SQ	B F SOMERVILLE PROPERTIES LLC	$ 5,358,100	Commercial	$ 26,791	$ 13,395
1	DAVIS SQ	DAVIS SQUARE LLC	$ 7,181,000	Commercial	$ 35,905	$ 17,953
82	DOVER ST	DOVER REAL ESTATE DEVELOPMENT LLC	$ 746,000	Residential	$ -	$ -
88	DOVER ST	CHOW MUI SIN	$ 827,900	Residential	$ -	$ -
94	DOVER ST	SERRANO DENNIS C	$ 878,100	Commercial	$ 4,391	$ 2,195
96	DOVER ST	SERRANO VINCENT & DENNIS ETAL	$ 1,035,400	Commercial	$ 5,177	$ 2,589
55	DAY ST	DAY/DOVER PARKING LLC	$ 1,634,100	Commercial	$ 8,171	$ 4,085
53	DAY ST	MARINA TRUST	$ 342,500	Commercial	$ 1,713	$ 856
49	DAY ST	SERRANO CATHERINE, TRUSTEE	$ 992,800	Commercial	$ 4,964	$ 2,482
45	DAY ST	DAVIS SQUARE BOWLADROME INC	$ 2,107,000	Commercial	$ 10,535	$ 5,268
278	ELM ST	URBAN EQUITY DEVELOPMENT CO	$ 1,962,400	Commercial	$ 9,812	$ 4,906
58	DAY ST	URBAN EQUITY DEVELOPMENT CO	$ 3,500,000	Commercial	$ 17,500	$ 8,750
270	ELM ST	URBAN EQUITY DEVELOPMENT COMPA	$ 384,900	Commercial	$ 1,925	$ 962
256	ELM ST	URBAN EQUITY DEVELOPMENT CO	$ 3,240,100	Commercial	$ 16,201	$ 8,100
246	ELM ST	SITT EDDIE	$ 2,355,300	Commercial	$ 11,777	$ 5,888

55	CHESTER ST	AMBISCO INC	$ 1,213,000	Commercial	$ 6,065	$ 3,033
53	CHESTER ST	AHERN MICHAEL A	$ 973,400	Mixed Use	$ 4,867	$ 2,434
7	HERBERT ST	URBAN EQUITY DEVELOPMENT CO	$ 617,100	Commercial	$ 3,086	$ 1,543
44	DAY ST	CITY OF SOMERVILLE	$ 1,665,200	Civic	$ -	$ -
3	GLOVER CIR	GRAINGE WILLIAM S	$ 441,300	Residential	$ -	$ -
93	DOVER ST	SHAAK MELISSA	$ 508,700	Residential	$ -	$ -
89	DOVER ST	MINER PETER A & FULTON NANCY L	$ 833,000	Residential	$ -	$ -
79	DOVER ST	SCARPATO FAMILY III LIMITED	$ 985,100	Residential	$ 1,200	$ 1,200
99	DOVER ST	99 DOVER STREET LLC	$ 4,428,500	Commercial	$ 22,143	$ 11,071
97	DOVER ST	HALL FRANCESCA A & MARK D	$ 721,600	Residential	$ -	$ -
28	NEWBERNE ST	ALTIER JULIE J	$ 573,500	Residential	$ -	$ -
110	WILLOW AVE	BOSTON EDISON COMPANY	$ 1,768,200	Commercial	$ 8,841	$ 4,421
361	HIGHLAND AVE	PERKINS EDWARD C	$ 673,600	Mixed Use	$ 3,368	$ 1,684
363	HIGHLAND AVE	SPY POND ASSOCIATES INC	$ 3,436,300	Commercial	$ 17,182	$ 8,591
371	HIGHLAND AVE	YANNI AUTO LLC	$ 697,100	Commercial	$ 3,486	$ 1,743
0	HIGHLAND AVE	CITY OF SOMERVILLE	$ 1,196,500	Civic	$ -	$ -
375	HIGHLAND AVE	SILVA FERNANDO & MARIA TRUSTEES	$ 595,900	Residential	$ -	$ -
377	HIGHLAND AVE	SILVA FERNANDO & MARIA TRUSTEES	$ 580,200	Residential	$ -	$ -
379	HIGHLAND AVE	MARTIN JOHN F	$ 578,400	Residential	$ -	$ -
381	HIGHLAND AVE	LOCCISANO VINCENT P & CANDACE LOMBARDI	$ 770,200	Residential	$ -	$ -
383	HIGHLAND AVE	LEE EUI IN & JAMIE & DAVID TRSTEES	$ 590,200	Residential	$ -	$ -
385	HIGHLAND AVE	B & L INVESTMENTS LLC	$ 1,465,800	Mixed Use	$ 7,329	$ 3,665
32	ELLINGTON RD	SULLIVAN MARK S	$ 506,600	Residential	$ -	$ -
26	ELLINGTON RD	KUMAR DHARM VIR & SUSHMA	$ 524,500	Residential	$ -	$ -
20	ELLINGTON RD	BUCCELLI JAMES J & JOHN P	$ 553,100	Residential	$ -	$ -
393	HIGHLAND AVE	393 HIGHLAND AVENUE LLC	$ 3,142,900	Commercial	$ 15,715	$ 7,857
14	ELLINGTON RD	ALADRO CAMILO A & COURTNEY M	$ 367,000	Residential	$ -	$ -
24	ELLINGTON RD	SILVA EDWARD C & MARK J TRS	$ 590,600	Residential	$ -	$ -
29	ELLINGTON RD	SULLIVAN MARK S.	$ 640,600	Residential	$ -	$ -
27	ELLINGTON RD	SULLIVAN MARK	$ 561,300	Residential	$ -	$ -
25	ELLINGTON RD	CURTIS LIANE	$ 561,700	Residential	$ -	$ -
373	HIGHLAND AVE	DIGIROLAMO RALPH TRSTEE	$ 6,785,700	Residential	$ 2,200	$ 2,200
373	HIGHLAND AVE	DIGIROLAMO RALPH TRSTEE	$ 6,785,700	Residential	$ 2,200	$ 2,200
28	CLIFTON ST	22 CLIFTON REAL ESTATE CORP	$ 1,400,300	Commercial	$ 7,002	$ 3,501
32	CLIFTON ST	MIX-IT STUDIOS COOPERATIVE	$ 1,841,200	Residential	$ 1,400	$ 1,400
0	CLIFTON ST	MIX-IT STUDIOS COOPERATIVE	$ 119,700	Commercial	$ 599	$ 299
0	WEST ST	MBTA	$ 900,900	Civic	$ -	$ -
0	HIGHLAND AVE	CITY OF SOMERVILLE	$ 1,000,300	Civic	$ -	$ -
390	HIGHLAND AVE	LEBOWITZ WAYNE &	$ 732,200	Residential	$ -	$ -
377	SUMMER ST	CHRISTOS POUTAHIDIS MANAGEMENT LLC	$ 3,309,300	Commercial	$ 16,547	$ 8,273
381	SUMMER ST	NICHOLS EVAGELOS	$ 1,249,100	Commercial	$ 6,246	$ 3,123
391	SUMMER ST	LAVERTY CHARLES R JR TRSTE	$ 2,914,500	Commercial	$ 14,573	$ 7,286
7	GROVE ST	CITY OF SOMERVILLE	$ 466,200	Civic	$ -	$ -
9	GROVE ST	CITY OF SOMERVILLE	$ 776,400	Civic	$ -	$ -
388	HIGHLAND AVE	NORCROSS BOYD A & MARY J TRSTEE	$ 679,900	Residential	$ -	$ -
386	HIGHLAND AVE	KASSIS CHRISTINE	$ 349,400	Residential	$ -	$ -
384	HIGHLAND AVE	CAMPANO JAMES J & KATHLEEN	$ 627,300	Residential	$ -	$ -
378	HIGHLAND AVE	CHRISTOS POUTAHIDIS MGMT LLC	$ 895,300	Commercial	$ 4,477	$ 2,238
374	HIGHLAND AVE	POUTAHIDIS CHRISTOS	$ 474,200	Commercial	$ 2,371	$ 1,186

372	HIGHLAND AVE	HOWE MARIE E TRUSTEE	$ 552,800	Residential	$ -	$ -
370	HIGHLAND AVE	CAMPBELL & FIORELLO	$ 609,100	Residential	$ -	$ -
368	HIGHLAND AVE	BUCCELLI JAMES J	$ 603,900	Mixed Use	$ 3,020	$ 1,510
366	HIGHLAND AVE	BUCCELLI JOHN P	$ 819,400	Residential	$ -	$ -
364	HIGHLAND AVE	TUCK BENJAMIN TRUSTEE	$ 902,300	Residential	$ -	$ -
362	HIGHLAND AVE	PARIGIAN GEORGE JR FOR LIFE	$ 629,700	Residential	$ -	$ -
362	HIGHLAND AVE	BUCCELLI JAMES J & JOHN P BUCCELLI	$ 698,400	Residential	$ -	$ -
341	SUMMER ST	BUTT MICHAEL H TRSTEE	$ 1,102,300	Mixed Use	$ 5,512	$ 2,756
343	SUMMER ST	THE DAKOTA PARTNERS LLC	$ 569,700	Commercial	$ 2,849	$ 1,424
351	SUMMER ST	GEORGE DILBOY POST 529 INC.	$ 1,284,600	Commercial	$ 6,423	$ 3,212
371	SUMMER ST	GEORGE DILBOY POST 529 INC	$ 1,391,900	Civic	$ -	$ -
5	CUTTER AVE	WINTER HILL FEDERAL SAVGS BANK	$ 3,897,300	Commercial	$ 19,487	$ 9,743
240	ELM ST	ARGIROS ALEXANDER A TRUSTEE	$ 5,139,700	Commercial	$ 25,699	$ 12,849
236	ELM ST	SITT EDDIE	$ 1,894,900	Commercial	$ 9,475	$ 4,737
230	ELM ST	HANCOCK SOMERVILLE LLC	$ 2,033,000	Commercial	$ 10,165	$ 5,083
212	ELM ST	DAVIS SQUARE REAL ESTATE LLC	$ 19,287,400	Commercial	$ 96,437	$ 48,219
360	SUMMER ST	DOLE ASSOC LTD PTNRSHIP	$ 1,951,000	Commercial	$ 9,755	$ 4,878
197	ELM ST	PANOS VAN G TRUSTEE	$ 930,800	Mixed Use	$ 4,654	$ 2,327
199	ELM ST	WISDOM PUBLICATIONS INC	$ 875,500	Civic	$ -	$ -
203	ELM ST	I & C CORPORATION	$ 1,482,300	Commercial	$ 7,412	$ 3,706
26	WINDOM ST	DELLANNO ANTHONY J & PATRICIA	$ 598,100	Residential	$ -	$ -
187	ELM ST	187 ELM STREET LLC	$ 1,661,700	Commercial	$ 8,309	$ 4,154
195	ELM ST	PANOS VAN G TRUSTEE	$ 575,800	Commercial	$ 2,879	$ 1,440
175	ELM ST	LUM VICTOR & CATHERINE TRUSTEES	$ 1,105,300	Commercial	$ 5,527	$ 2,763
179	ELM ST	LUM VICTOR & CATHERINE TRUSTEES	$ 1,037,600	Mixed Use	$ 5,188	$ 2,594
0	ELM ST	CHURCH OF THE NAZERENE	$ 48,800	Civic	$ -	$ -
202	ELM ST	GILBERT GARY W & ROUTHIER CHRISTINE A	$ 15,500	Commercial	$ 78	$ 39
200	ELM ST	GOLDBERG WEINER REALTY LLC	$ 42,600	Commercial	$ 213	$ 107
0			$ -	Civic	$ -	$ -
0			$ -	Civic	$ -	$ -
0			$ -	Civic	$ -	$ -
0			$ -	Civic	$ -	$ -
0			$ -	Civic	$ -	$ -
0			$ -	Civic	$ -	$ -
0			$ -	Civic	$ -	$ -