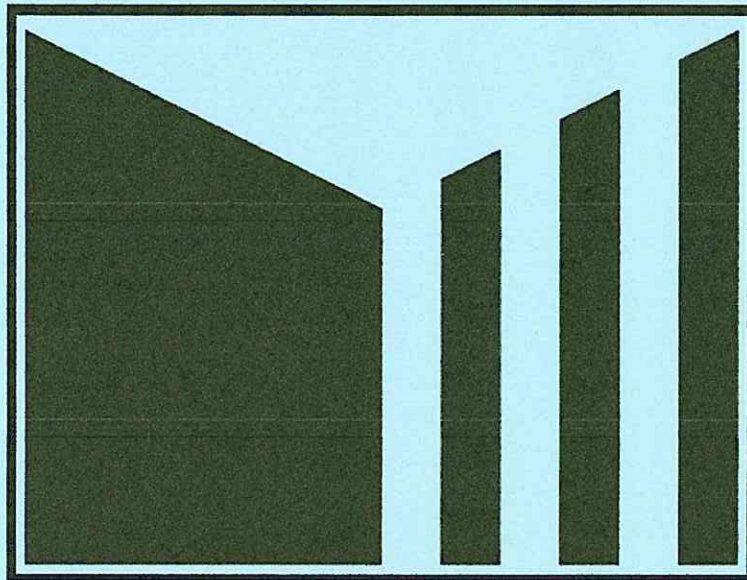


29/176

# MONTROSE MANAGEMENT DISTRICT



Agenda and Agenda Materials  
Meeting of the Board of Directors

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July 13, 2015



**MONTROSE MANAGEMENT DISTRICT**  
**NOTICE OF MEETING**

**TO: THE BOARD OF DIRECTORS OF THE MONTROSE MANAGEMENT DISTRICT AND TO ALL OTHER INTERESTED PERSONS:**

Notice is hereby given that a meeting of the Board of Directors of the Montrose Management District will be held at 12:00 pm on Monday, July 13, 2015, at 401 Branard Street, 2nd Floor, Room 106, Houston, Texas 77006, inside the boundaries of the District, open to the public, to consider, discuss and adopt such orders, resolutions or motions, and take other direct or indirect actions as may be necessary, convenient, or desirable with respect to the following matters:

**AGENDA**

1. Determine quorum; call to order.
2. Approve minutes of regular meeting held June 8, 2015.
3. Consider Board nominations for existing expiring terms and process for making recommendations for vacant positions.
4. Accept Oaths of Office, Sworn Statements, and Bonds from Newly Appointed Board Members.
5. Receive public comments.
6. Receive District's monthly Assessment Collection Reports and Billing and Assessment Summaries, Lawsuit and Arbitration Status Details, and Delinquent Assessment Reports.
7. Receive and consider District's monthly financial report, including pay invoices.
8. Receive and Approve FY 2014 Financial Audit Report.
9. Receive Reports:
  - a. Public Safety
  - b. Mobility & Visual Improvements
    - (i) Receive update on TXDOT bridges
    - (ii) Consider recommendations for prioritization of signage and esplanade improvements in the District
    - (iii) Consider an amended approach to the Special Parking Area application to the City of Houston
    - (iv) Consider proposal to remove the Montrose gateway monument at Westheimer and Bagby Streets
  - c. Marketing and Business Development
    - (i) Consider Committee recommendation for services agreement with Michael Hardy to provide professional writing services for the District in the amount of \$500 per feature article for a total monthly cost not to exceed \$2,000
  - d. Business Ambassador
  - e. Business and Economic Development
  - f. Executive Director
10. Consider resignation of Brad Nagar from Board of Directors.
11. Announcements.
12. Adjourn.



\_\_\_\_\_  
Executive Director

Persons with disabilities who plan to attend this meeting and would like to request auxiliary aids or services are requested to contact the District's Executive Director at (713) 5951200 at least three business days prior to the meeting so that the appropriate arrangements can be made.

**MONTROSE MANAGEMENT DISTRICT  
CITY OF HOUSTON  
HARRIS COUNTY, TEXAS**

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**AGENDA MEMORANDUM**

**TO:** Montrose Management District Board of Directors  
**FROM:** Executive Director  
**SUBJECT:** Agenda Item Materials

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2. Approve minutes of the regular meeting held June 8, 2015.

**MINUTES OF THE MEETING OF THE  
MONTROSE MANAGEMENT DISTRICT  
BOARD OF DIRECTORS**

**June 8, 2015**

**DETERMINE QUORUM; CALL TO ORDER.**

The Board of Directors of the Montrose Management District held a regular meeting, open to the public, on Monday, June 8, 2015, at 12:00 p.m. at 401 Branard Street, 2nd Floor, Room 106, Houston, Texas 77006, inside the boundaries of the District, and the roll was called of the duly appointed members of the Board, to-wit:

Position 1 -	Claude Wynn, <i>Chairman</i>	Position 9 -	Kathy Hubbard, <i>Treasurer</i>
Position 2 -	<i>vacant</i>	Position 10 -	Michael Grover
Position 3 -	Randy Mitchmore, <i>Vice Chairman</i>	Position 11 -	<i>vacant</i>
Position 4 -	Cassie Stinson, <i>Secretary</i>	Position 12 -	Brad Nagar
Position 5 -	Lane Llewellyn	Position 13 -	Dan B. Leverett
Position 6 -	Robert Jara	Position 14 -	<i>vacant</i>
Position 7 -	Ryan Haley	Position 15 -	Randall Ellis
Position 8 -	Stephen L. Madden		

and all were present, with the exception of Directors Wynn, Haley, Nagar, Stinson and Leverett, thus constituting a quorum. Also present were David Hawes, Bill Calderon, Holli Robinson, Linda Clayton, Gretchen Larson, Brian Burks and Jerry Lowry, all with Hawes Hill Calderon, LLP; Clark Lord, Bracewell & Giuliani; Pat Hall, Equi-Tax, Inc.; Felecia Alexander, Municipal Accounts & Consulting; Dennis Beedon, Montrose Business Ambassador; Ray Lawrence, Lawrence & Associates; and Barry Abrams Rome Blank. Others attending the meeting were Officer Victor Beserra, HPD; Daphne Scarbrough, Richmond Avenue Coalition; and Tawny Tidwell. Co-Chair Mitchmore called the meeting to order at 12:07 p.m.

**APPROVE MINUTES OF REGULAR MEETING HELD MAY 11, 2015.**

Upon a motion duly made by Director Llewellyn, and being seconded by Director Madden, the Board voted unanimously to approve the Minutes of the May 11, 2015, Board meeting, as presented.

**ACCEPT OATHS OF OFFICE, SWORN STATEMENTS, AND BONDS FROM NEWLY APPOINTED BOARD MEMBERS.**

No newly appointed Board members were present. No action from the Board was required.

**RECEIVE PUBLIC COMMENTS.**

There were no public comments.

**12:09 p.m. Director Cassie Stinson arrived**

**CONVENE IN EXECUTIVE SESSION PURSUANT TO SECTION 551.071, TEXAS GOVERNMENT CODE, TO CONDUCT A PRIVATE CONSULTATION WITH ATTORNEY TO DISCUSS LITIGATION, AND MATTERS RELATED TO THE SAME.**

The Board convened in executive session at 12:09 p.m.

**RECONVENE IN OPEN SESSION AND AUTHORIZE APPROPRIATE ACTION BY LEGAL COUNSEL RELATED TO EXECUTIVE SESSION.**



The Board reconvened in open session at 12:24 p.m. No action was taken.

**RECEIVE AND CONSIDER DISTRICT'S MONTHLY FINANCIAL REPORT, INCLUDING PAY INVOICES.**

Ms. Alexander presented the District's monthly financial report and went over invoices, included in the Board agenda materials. Upon a motion duly made by Director Grover, and being seconded by Director Llewellyn, the Board voted unanimously to accept the monthly financial report and approved payment of invoices, as presented.

**RECEIVE DISTRICT'S MONTHLY ASSESSMENT COLLECTION REPORTS AND BILLING AND ASSESSMENT SUMMARIES, LAWSUIT AND ARBITRATION STATUS DETAILS, AND DELINQUENT ASSESSMENT REPORTS.**

Ms. Hall presented the monthly assessment collection report, included in the Board agenda materials, and answered questions. She reported 96% collected in the east zone with 64 unsettled accounts. She reported the preliminary valuation numbers for 2015 were at \$551 million for the east zone. She reported 96% collected in the west zone with 124 unsettled accounts. She reported the preliminary valuation numbers for 2015 were at \$1.256 billion for the west zone. No action from the Board was required.

**RECEIVE REPORTS**

**a. Public Safety**

Officer Beserra presented the Patrol Summary Report for May, 2015, included in the Board agenda materials, and answered questions. He reported on residential driveway robberies happening between the hours of 8:30 p.m. and 11:30 p.m. He cautioned everyone to pay attention to their surroundings. Mr. Burks handed out the Public Safety Committee meeting report, a copy is attached as Exhibit A. He provided an update on the County Attorney program. No action from the Board was required.

**b. Mobility & Visual Improvements**

Mr. Hawes reported the Mobility & Visual Improvements Committee met on May 19, a copy of the meeting agenda is included in the Board agenda materials. He reported the Committee continues to work on the 5 year CIP. He provided an update on the special parking application.

**(i) Consider proposal from Walter P. Moore for bridge structural engineering in the amount of \$35,000**

Mr. Hawes provided an update on the status of the project and reported the Committee was recommending the Board approve the proposal from Walter P. Moore. Upon a motion duly made by Director Madden, and being seconded by Director Hubbard, the Board voted unanimously to approve the proposal from Walter P. Moore for bridge structural engineering in the amount of \$35,000.

**c. Marketing and Business Development**

Ms. Larson updated the Board on the Committee meeting. She went over the social media report and reported an increase in Twitter followers for the month of May. No action from the Board required.

**d. Business Ambassador**

Mr. Beedon reported 39 business contacts for the month of May. He updated the Board on new businesses in the District. No action from the Board was required.

**e. Business and Economic Development**

Mr. Lawrence reported the Committee met on May 27 and provided an update to the Board. He reported on year to date platting activity in the District. He reported the Committee was working on a survey for mayoral candidates and the projected timeline of finalizing and sending survey out was in July with results tabulated by early September. He reported he and Mr. Allender were undertaking a TIRZ feasibility analysis and anticipated it to be completed by September. Mr. Hawes pointed out the feasibility analysis would be taken from an economic development standpoint. No action from the Board was required.

**f. Executive Director**

Mr. Hawes reported on initiatives in the District, including a meeting to discuss an innovative parking concept. No action from the Board was required.

**ANNOUNCEMENTS.**

Mr. Hawes reported staff continues to work on the Board Retreat and tentative dates.

**ADJOURN.**

There being no further business to come before the Board, Co-Chair Mitchmore adjourned the meeting at 12:56 p.m.



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Secretary

List of Exhibits

- A. Public Safety Committee Report, dated June 5, 2015

**MONTROSE MANAGEMENT DISTRICT  
CITY OF HOUSTON  
HARRIS COUNTY, TEXAS**

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**AGENDA MEMORANDUM**

**TO:** Montrose Management District Board of Directors  
**FROM:** Executive Director  
**SUBJECT:** Agenda Item Materials

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3. Consider Board nominations for existing expiring terms and process for making recommendations for vacant positions.

**MONTROSE MANAGEMENT DISTRICT**

**BOARD OF DIRECTORS WHO TERMS EXPIRE JUNE 1, 2015**

Robert Jara	Position 6	June 1, 2015
Ryan Haley	Position 7	June 1, 2015
Stephen L. Madden	Position 8	June 1, 2015
Dan B. Leverett	Position 13	June 1, 2015
Vacant	Position 14	June 1, 2015
Randall K. Ellis	Position 15	June 1, 2015

**TERM EXPIRES JUNE 1, 2017**

Vacant	Position 2	June 1, 2017
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MONTROSE MANAGEMENT DISTRICT  
CITY OF HOUSTON  
HARRIS COUNTY, TEXAS

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**AGENDA MEMORANDUM**

TO: Montrose Management District Board of Directors  
FROM: Executive Director  
SUBJECT: Agenda Item Materials

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6. Receive the Montrose Management District's monthly Assessment Collection Report and Billing and Assessment Summary, Lawsuit and Arbitration Status Summary, and Delinquent Assessment Report.

**MONTROSE DISTRICT EAST ZONE  
ASSESSMENT COLLECTION REPORT  
June 2015  
BILLING AND COLLECTION SUMMARY  
FISCAL YEAR  
01/01/15 - 12/31/15**

YEAR	RATE	TOTAL LEVY	COLLECTIONS	RECEIVABLE	% COLLECTED
2014	0.12500	\$623,022.87	\$607,007.40	\$16,015.47	97%
2013	0.12500	\$496,740.16	\$494,988.52	\$1,751.64	100%
2012	0.12500	\$428,376.18	\$427,671.62	\$704.56	100%
2011	0.12500	\$409,486.26	\$409,448.78	\$37.50	99%
2010	0.12500	\$402,221.57	\$402,184.07	\$37.50	99%
2009	0.12500	\$419,939.17	\$419,901.67	\$37.50	99%
2008	0.12500	\$396,675.13	\$396,650.13	\$25.00	99%
2007	0.12500	\$309,868.58	\$309,849.83	\$18.75	99%

Current Month Activity

Revenue:	Current Month	Year to Date
2014 Assessment Collected	9,872.83	540,065.59
2013 Assessment Collected	405.76	2,515.45
2012 Assessment Collected	0.00	587.70
2011 Assessment Collected	0.00	-212.70
2010 Assessment Collected	0.00	0.00
2009 Assessment Collected	0.00	0.00
2008 Assessment Collected	0.00	0.00
2007 Assessment Collected	0.00	0.00
Penalty & Interest	1,518.43	6,659.27
Overpayments	113.20	21,551.59
CAD Lawsuits	256.02	2,111.11
CAD Corrections	0.00	0.00
Collection Fees	109.83	1,399.19
Estimated Payments	0.00	318.31
Court Fees	0.00	0.00
<b>Total Revenue</b>	<b>12,276.07</b>	<b>574,995.51</b>

Overpayments Presented for Refund	3,369.28	26,395.14
Overpayments Applied to Assessment	0.00	0.00

ASSESSED VALUE FOR 2014:	501,004,025	Uncertified:	0
ASSESSED VALUE FOR 2013:	401,064,977	Uncertified:	0
ASSESSED VALUE FOR 2012:	343,010,098	Uncertified:	0
ASSESSED VALUE FOR 2011:	327,610,699	Uncertified:	0
ASSESSED VALUE FOR 2010:	321,799,663	Uncertified:	0
ASSESSED VALUE FOR 2009:	336,117,938	Uncertified:	0
ASSESSED VALUE FOR 2008:	317,339,817	Uncertified:	0
ASSESSED VALUE FOR 2007:	322,144,526	Uncertified:	0

Assessment Collection Account: Compass Bank, Account No. 2530962019

**ASSESSMENT PLAN PROJECTIONS**

YEAR	MAX RATE	PROJECTED LEVY 2%	COLLECTIONS @ 95%	CUMULATIVE COLLECTIONS	10 YEAR AVERAGE @ 10%
2007	0.12500	337,500	320,625	309,849.83	
2008	0.12500	344,250	327,038	396,650.13	
2009	0.12500	351,135	333,578	419,901.67	
2010	0.12500	358,158	340,250	402,184.07	
2011	0.12500	365,321	347,055	409,448.76	
2012	0.12500	372,627	353,996	427,671.62	
2013	0.12500	380,080	361,076	\$494,988.52	
2014	0.12500	387,681	368,297	\$607,007.40	
2015	0.12500	395,435	375,663		
2016	0.12500	403,344	383,177		
		3,695,531	3,510,754		369,553

The Projected Levy is based on the rate remaining at 0.12500

Prepared by: Equi-Tax Inc.  
Collector for the District

**MONTROSE DISTRICT EAST ZONE**

June 2015

TOP TEN ASSESSMENT PAYERS						
PROPERTY OWNERS	ACCOUNT NOS	SITUS	PROPERTY TYPE	VALUE	ASSESSMENT	
PPF AMLI 2221 WEST DALLAS ST LL 200 W MONTROSE ST STE 2200 CHICAGO IL 60606-5070	1269260010001	2221 W DALLAS ST 404 77019	MULTI-FAMILY	69,252,444	86,565.56	
POST RICHMOND LP 4401 NORTHSIDE PKWY NW STE 800 ATLANTA GA 30327-3093	1309010010001	RICHMOND AVE 77006	MULTI - FAMILY	29,214,117	36,517.65	
UST REALTY COMPANY % UNIV OF ST THOMAS: ATTN PRES 3800 MONTROSE BLVD HOUSTON TX 77006-4626	0261640000027 0261630000021 0261630000001	4100 MONTROSE BLVD 77006 4203 YOAKUM BLVD 77006 4200 MONTROSE BLVD	OFFICE BUILDINGS	13,904,459	17,380.57	
CAMPANILE SOUTH LP 109 N POST OAK LN STE 200 HOUSTON TX 77024-7789	0302460000001 0302460000041 0302460000026 0302460000023	0 RICHMOND 77006 0 RICHMOND 77006 4306 YOAKUM BLVD #16 77006 4301 MOUNT VERNON #26 77006	OFFICE BUILDINGS	11,380,510	14,225.64	
4203 MONTROSE LTD 3810 W ALABAMA HOUSTON TX 77027-5204	1277520010001	4203 MONTROSE BLVD 77006	OFFICE BUILDING	10,214,000	12,767.50	
RIVERSIDE CPI LLC & REALTY CTR MANAGEMENT INC 1990 S BUNDY DR STE 100 LOS ANGELES CA 90025	0370370010001	220 W ALABAMA ST 131 77006	MULTI - FAMILY	9,000,516	11,250.65	
WALGREENS 03157 % TAX DEPT STOP NO 75 300 WILMOT RD DEERFIELD IL 60015-4614	1179390010001	3317 MONTROSE BLVD 77006	RETAIL PHARMACY	8,205,613	10,257.02	
ARMSTRONG CHARLES 5000 MONTROSE BLVD UNIT 22C HOUSTON TX 77006-6564	0140670000002 0140250000001 0140250000002 0140250000005 0140670000001 0140670000003 0140670000004 0140670000005 0140670000006 0140670000009	804 PACIFIC ST 77006 2302 GENESEE ST 12 77006 2308 GENESEE ST 77006 120 FAIRVIEW ST 77006 802 PACIFIC ST 77006 808 PACIFIC ST 77006 811 PACIFIC ST 77006 925 HYDE PARK BLVD 77006 809 HYDE PARK BLVD 77006 925 HYDE PARK BLVD 77006	VARIOUS COMMERCIAL	7,157,554	8,909.83	

# MONTRÖSE DISTRICT EAST ZONE

June 2015

## TOP TEN ASSESSMENT PAYERS

0261510000020	2602 CROCKER ST 77006				
0261510000021	2605 GRANT ST 77006				
0261510000027	805 PACIFIC ST 77006				
0442130000001	810 PACIFIC ST 77006				
0140680000009	810 HYDE PARK BLVD 77006				
NEW 4119 MONTRÖSE LLC	4119 MONTRÖSE BVD 77006	OFFICE BUILDINGS	4,928,228	6,160.29	
4200 MONTRÖSE BLVD					
HOUSTON TX 77006-4963					
3815 MONTRÖSE BVLD LP	3820 ROSELAND ST 77006	OFFICE BUILDINGS	4,600,509	5,750.64	
3815 MONTRÖSE BVLD STE 211	3815 MONTRÖSE BLVD 77006				
HOUSTON TX 77006-4666					



MONTROSE DISTRICT EAST ZONE

June 2015						
TOP TEN DELINQUENTS						
PROPERTY OWNER	ACCOUNT NO	SITUS	PROPERTY TYPE	ASSESSMENT YEAR(S)	ASSESSMENT	
BAIRD CHARLES L 2438 WHITE OAK DR HOUSTON TX 77009-7322	92 008 270 000 0005	506 SUL ROSS ST #11 77006	APARTMENT	2012 - 2014	2,381.27	
WHITNEY PLACE LTD 3719 INGOLD ST HOUSTON TX 77005-3623	92 121 274 001 0001	425 WETHEIMER RD 77006	SHOPPING CENTER	2014	2,053.18	
GAWERC BRONIA 330 FAIRVIEW ST HOUSTON TX 77006-3002	92 014 064 000 0011	330 FAIRVIEW ST 77006	OFFICE BUILDINGS	2013 - 2014	2,023.12	
900 LOVETT LTD 1210 W CLAY ST STE 25 HOUSTON TX 77019-4191	92 026 152 000 0017	900 LOVETT BLVD 77006	SCHOOL	2014	1,878.22	
YOSHIDA NAOMITSU & MAEMI * 3210 EL DORADO BLVD MISSOURI CITY TX 77459-3012	92 030 245 000 0014	4412 MONTROSE 77006	RESTAURANT	2014	1,729.69	
MANIHA LAURA R PO BOX 5528 HOUSTON TX 77255-5528	92 037 081 000 0023	2205 MONTROSE BLVD 77006	OFFICE BUILDINGS	2014	1,574.09	
CHOICE CONDOMINIUM GP LLC 3100 EDLOE ST STE 260 HOUSTON TX 77027-6069	92 134 379 001 0001	0 YAKUM BLVD 77006	VACANT	2014	1,341.75	
4309 YOAKUM LP * 4309 YOAKUM BLVD STE 200 HOUSTON TX 77006-5886	92 030 245 000 0003	4309 YOAKUM BLVD 77006	CONVERSION - RES	2014	1,186.56	
DONG DIEP NGUYEN 3007 S DAIRY ASHFORD RD STE 9 HOUSTON TX 77082-2794	92 056 053 000 0018	711 W GRAY ST 77019	SHOPPING CENTER	2014	876.32	
VALLE FRANCISCO G 815 RICHMOND AVE HOUSTON TX 77006	92 014 150 000 0015	815 RICHMOND AVE 77006	RESTAURANT	2014	806.28	

\* Pending Lawsuit

Harris County Improvement District No. 6 / East Montrose  
Lawsuit and Arbitration Status Summary as of 6/12/2015

Jur 930

**Summary**

For Tax Years 2007-2014, for the period of June 2009 through May 2015

**Settled**

609,402,958	Original value of <b>Settled</b> accounts as of 6/12/2015
186	Number of <b>Settled</b> accounts as of 6/12/2015
57,212,316	Reduction in value of <b>Settled</b> accounts
9.39%	Average % reduction in value of <b>Settled</b> accounts

**Unsettled**

148,613,114	Original value of <b>Unsettled</b> accounts as of 6/12/2015
61	Number of <b>Unsettled</b> accounts as of 6/12/2015

.125 Tax rate per \$100 valuation

**\$17,440** Estimated reduction in assessment on 61 Unsettled accounts,  
based on **9.39%** average

**MONTROSE DISTRICT WEST ZONE  
ASSESSMENT COLLECTION REPORT  
June 2015  
BILLING AND COLLECTION SUMMARY  
FISCAL YEAR  
01/01/15 - 12/31/15**

YEAR	RATE	TOTAL LEVY	COLLECTIONS	RECEIVABLE	% COLLECTED
2014	0.12500	\$1,369,913.30	\$1,317,328.10	\$52,585.20	96%
2013	0.12500	\$1,141,888.90	\$1,123,093.62	\$18,795.28	98%
2012	0.12500	\$971,883.28	\$967,134.35	\$4,748.93	100%
2011	0.12500	\$883,812.60	\$882,046.64	\$1,765.96	99%
2010	0.12500	\$867,868.55	\$866,135.44	\$1,733.11	99%

Current Month Activity

Revenue:	Current Month	Year to Date
2014 Assessment Collected	6,743.85	1,122,901.16
2013 Assessment Collected	-138.67	845.24
2012 Assessment Collected	125.81	612.70
2011 Assessment Collected	0.00	570.52
2010 Assessment Collected	0.00	-701.75
Penalty & Interest	1,067.08	8,087.09
Overpayments	4.96	11,594.84
CAD Lawsuits	736.86	11,152.72
CAD Corrections	0.00	1,162.79
Collection Fees	35.23	2,177.24
Estimated Payments	0.00	0.00
Court Fees	0.00	0.00
<b>Total Revenue</b>	<b>8,575.12</b>	<b>1,158,402.55</b>
Overpayments Presented for Refund	830.77	25,684.26
Overpayments Applied to Assessment	0.00	0.00

ASSESSED VALUE FOR 2014:	<b>1,099,412,382</b>	Uncertified:	<b>70,822</b>
ASSESSED VALUE FOR 2013:	<b>913,610,113</b>	Uncertified:	<b>0</b>
ASSESSED VALUE FOR 2012:	<b>778,211,276</b>	Uncertified:	<b>0</b>
ASSESSED VALUE FOR 2011:	<b>707,049,655</b>	Uncertified:	<b>0</b>
ASSESSED VALUE FOR 2010:	<b>694,292,461</b>	Uncertified:	<b>0</b>

Assessment Collection Account: Compass Bank, Account No. 2530962086

**ASSESSMENT PLAN PROJECTIONS**

YEAR	MAX RATE	PROJECTED LEVY 2%	COLLECTIONS @ 95%	CUMULATIVE COLLECTIONS	10 YEAR AVERAGE @ 10%
2010	0.12500	867,869	824,475	\$866,135.44	
2011	0.12500	885,226	840,965	\$882,046.64	
2012	0.12500	902,930	857,784	\$967,134.35	
2013	0.12500	920,989	874,940	\$1,123,093.62	
2014	0.12500	939,409	892,438	\$1,317,328.10	
2015	0.12500	958,197	910,287		
2016	0.12500	977,361	928,493		
		<b>6,451,981</b>	<b>6,129,382</b>		<b>645,198</b>

The Projected Levy is based on the rate remaining at 0.12500

Prepared by: Equi-Tax Inc.  
Collector for the District

# MONTROSE DISTRICT WEST ZONE

June 2015

## TOP TEN ASSESSMENT PAYERS

PROPERTY OWNER	ACCOUNT NOS	SITUS	PROPERTY TYPE	VALUE	ASSESSMENT
WEINGARTEN REALTY INVESTORS 0591-001 P O BOX 924133 HOUSTON TX 77292-4133	0442250000001 0442250000170 0442250000169 0442250000168 0442250000145 0442250000110 0442250000105 0442250000005 0442250000002 0442250000171	2005 W GRAY ST 77019 1953 W GRAY ST 77019 1953 W GRAY ST 77019 2028 W GRAY ST 77019 2001 W GRAY ST 77019 2020 W GRAY ST 77019 2010 W GRAY ST 77019 2002 W GRAY ST 77019 1950 W GRAY ST 77019 2017 W GRAY ST 77019	VARIOUS COMMERCIAL	74,770,722	93,463.40
FINGER FSC MONTROSE LTD 99 DETERING ST STE 200 HOUSTON TX 77007-8259	1215190010001	4899 MONTROSE BLVD 187 77006	MULTI - FAMILY	62,934,814	78,868.52
US REIF WESTHEIMER APARTMENTS TX LLC 1270 SOLDIERS FIELD RD BRIGHTON MA 02135-1003	1286390010001	2001 WESTHEIMER RD 244 77098	MULTI - FAMILY	48,808,923	61,011.15
DUNLAVY DEVELOPMENT PHASE 1 LLC 101 BERKSHIRE ST BELLAIRE TX 77401-5309	1285480010001	4310 DUNLAVY ST 236 77006	MULTI - FAMILY	40,600,000	50,750.00
ANBIL II-R O L P 105 TOWN CENTER RD STE 10 KING OF PRUSSIA PA 19406-2394	0730810030011 1170070010001 1170070020001 0730810030007	1505 W CLAY ST 77019 1422 W GRAY ST 77019 1414 WAUGH DR 77019 1521 W CLAY ST 77019	SHOPPING CENTER	40,560,967	50,701.21
WEST GRAY RESIDENTIAL LP C/O THE HANOVER CO EARL MALLEY 5847 SAN FELIPE ST STE 3600 HOUSTON TX 77057-3263	1335700010001	1340 W GRAY ST 77019	MULTI - FAMILY	35,053,929	43,817.41
TEXAS ABERCROMBIE FAMILY INT LTD 730 N POST OAK RD STE 110 HOUSTON TX 77024-3854	1327190010001 1327190010002	0 W ALABAMA ST 77098 1701 W ALABAMA ST 77098	SUPERMARKET	26,972,706	33,715.88
BEHRINGER HARVARD MUSEUM DISTRICT PROJECT OWNER LP 5800 GRANITE PKWY STE 1000 PLANO TX 75024-6619	1336630010001	1301 RICHMOND AVE #270 77006	APARTMENT	23,345,222	29,181.53



**MONTROSE DISTRICT WEST ZONE**

June 2015					
TOP TEN ASSESSMENT PAYERS					
4300 DUNLAVY DEVELOPMENT LLC 101 BERKSHIRE ST BELLAIRE TX 77401-5309	1286480010002	4310 DUNLAVY ST 77006	APARTMENT	19,335,887	24,169.86
WEINGARTEN REALTY INVESTORS 0591-001 P O BOX 924133 HOUSTON TX 77292-4133	0442250000173	2030 W GRAY ST 77019	SHOPPING CENTER	16,739,278	20,924.10

**June 2015**

TOP TEN DELINQUENT ACCOUNTS					ASSESSMENT YEAR(S)	ASSESSMENT
PROPERTY OWNER	ACCOUNT NO	SITUS	PROPERTY TYPE			
5020 INVESTMENTS LTD 5020 MONTROSE BLVD FL 9 HOUSTON TX 77008-6550	94 036 024 000 0003	5020 MONTROSE BLVD 77006	OFFICE BUILDINGS		2013 - 2014	23,931.03
LEVEL HEADED CHOW LLC 4721 N MAIN ST STE Q HOUSTON TX 77009-4400	94 026 198 000 0005	3414 GRAUSTARK ST #8 77006	MULTI - FAMILY		2010 - 2014	3,574.55
KNA PARTNERS * 550 WAUGH DR HOUSTON TX 77019-2002	94 026 174 000 0001	1111 WESTHEIMER RD 77006	SHOPPING CENTER		2013 - 2014	2,749.15
EISEMANN MAUDE 5455 JOHN DREAPER DR HOUSTON TX 77054-4230	94 010 167 000 0030	1116 W GRAY ST 77019	VACANT		2010 - 2014	2,739.83
LEGACY COMMUNITY HEALTH ENDOW PO BOX 60338 HOUSTON TX 77205-0338	94 018 003 000 0011	1407 MISSOURI ST 77006	VACANT		2013 - 2014	2,713.54
SAFOS CHRIST 3838 GREENOCK LN HOUSTON TX 77025-2408	94 056 125 000 0013	2009 COLQUITT ST 77098	APARTMENT		2012 - 2014	2,579.17
BISHOP JOAN 1547 WAVERLY ST HOUSTON TX 77008-4148	94 033 193 000 0005	120 PORTLAND 77006	RES CONVERSION		2012 - 2014	2,455.41
IVANHOE BRANARD * 2035 MILFORD ST HOUSTON TX 77098-5309	94 038 220 000 0001	1915 BRANARD ST #22 77098	APARTMENT GARDEN		2013 - 2014	2,402.45
MULBERRY STREET REAL ESTATE VENTURES LLC 610 HAROLD ST HOUSTON TX 77008-4426	94 132 116 001 0001	1425 KILPING ST 77006	DAY CARE CENTER		2014	2,380.37
MOUZI MOSTAFA 3415 ABINGER LN HOUSTON TX 77088-5607	94 130 493 001 0001	10 WESTHEIMER RD 77006	VACANT		2012 - 2014	1,990.10
Pending Lawsuits						

## \* Pending Lawsuits

# Harris County Improvement District No. 11 / West Montrose Lawsuit and Arbitration Status Summary as of 6/12/2015

Jur 939

## **Summary**

For Tax Years 2010-2014, for the period of September 2010 through May 2015

### Settled

927,245,603	Original value of <b>Settled</b> accounts as of 6/12/2015
292	Number of <b>Settled</b> accounts as of 6/12/2015
68,076,572	Reduction in value of <b>Settled</b> accounts
7.34%	Average % reduction in value of <b>Settled</b> accounts

### Unsettled

314,159,636	Original value of <b>Unsettled</b> accounts as of 6/12/2015
98	Number of <b>Unsettled</b> accounts as of 6/12/2015

.125 Tax rate per \$100 valuation

**\$28,831** Estimated reduction in assessment on 98 Unsettled accounts,  
based on 7.34% average

**PERDUE, BRANDON, FIELDER, COLLINS & MOTT L.L.P.**  
**DELINQUENT ASSESSMENT REPORT**  
**HARRIS COUNTY IMPROVEMENT DISTRICT #9**  
**July 9, 2015**

Delinquent 2014 accounts have been turned over to us for collection. We are reviewing accounts in preparation to send initial demand letters and we are beginning phone calls. This report covers delinquencies prior to 2014; amounts shown are 2013 base assessment amounts.

**Bankrupt, claim filed:**

Round Table Management LLC \$6,900.00, 9333 Bryant St. (reserves A2 & B2 block 1)-1290960010006  
**Paid in full.**

Nathan Bernard Alexander \$330.95, 6938, 6940 and lot 7 block 2 on Westover St.-0741530020008,  
0741530020010, 0741530020007  
**Paid in full.**

**Interventions into County or ISD suits:**

Riverside General Hospital \$2,013.09, 7655 Bellfort St.-0950630000022

We have intervened in a suit filed by Harris County; a trial date was set for 1/13/15 but the defendant requested a motion for a continuance which was granted. A new trial date is set for 7/14/15. (This report was prepared on 7/1, we will report the results of the trial in our next report.) The property was carried as exempt by HCAD for 2014 but the exemption was removed in November.

Houston Area Bricklayers JAC \$704.29, 9105 Edgebrook St.-0630330310009

We have intervened in a suit filed by Harris County; a trial date is set for 9/30/15. We will monitor the case.

Zeenat Foundation \$395.31, reserve A, block 1 on Monroe Rd.-1236430010001

We have intervened in a suit filed by Pasadena ISD. A hearing date has not been set at this time; we will monitor the case.

Edward John Stevens \$108.94, 8129 Telephone Rd.-0650500010008

We have intervened in a suit filed by Harris County. Judgment was submitted on 4/8/15; as of 7/1, a ruling has not been made.

Abraham Green \$71.02, vacant tract on Bellfort St.-0410120010078

We have intervened in a suit filed by Harris County; judgment was submitted on 11/19/14 but a ruling was not made. A new judgment was submitted on 2/25/15 and recommended on 3/19/15; the judgment was signed on 5/11/15.

Estate of Khosrow Abtahi \$21.00, 6539 Northdale-0600770090024

We have intervened in a suit filed by Harris County; a trial date is set for 7/21/15.

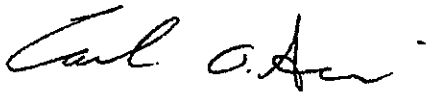
- Where appropriate, delinquent 2014 assessments are included in the above suits.

**All other 2013 accounts:**

There are 4 accounts with 2013 base assessments between \$400 and \$780 and 44 accounts that have base assessments of less than \$400. Demand letters have been sent, we are trying to reach each owner by phone and we are contacting lienholders, where appropriate. Due to the size of the accounts, further action is not recommended at this time.



If you have any questions, please feel free to contact me.



Carl O. Sandin

PerdueBrandonFielderCollins&Mott LLP   
ATTORNEYS AT LAW

Email: [csandin@pbfcml.com](mailto:csandin@pbfcml.com)

Office: 713-802-6965 (Direct Line)

Mobile: 713-824-1290

Fax: 713-862-1429

**PERDUE, BRANDON, FIELDER, COLLINS & MOTT L.L.P.**  
**DELINQUENT ASSESSMENT SUMMARY REPORT**  
**MONTROSE DISTRICT**  
**July 13, 2015**

Amounts shown are 2013 base assessment unless indicated. Account numbers and addresses for Montrose District-West Zone are noted in *italics*.

**Suit pending:**

Level Headed Chow LLC 10-13 assessments \$2,713.95, *3414 Graustark St.-0261980000005*  
Heirs of Maude Eisemann 10-13 assessments \$2,004.75, *1116 W. Gray St.-0101670000030*  
Joan Bishop 12-13 assessments \$1,576.16, *120 Portland St.-0331930000005*  
Charles R. Baird (was Gamru Properties Ltd.) 12-13 assessments \$1,460.69, *506 Sul Ross St.-0082700000005*  
Legacy Community Health Endowment \$1,316.66, *1407 Missouri St.-0180030000011*  
Mostafa Mouzi 12-13 assessments \$1,202.13, *Reserve A Block 1 on Westheimer Rd.-1304930010001*  
Unique Development Group \$1,167.51, *1842 Colquitt St.-0382240000007*  
Sheridan R. Diaz 12-13 assessments \$1,064.93, *1806 W. Alabama St.-0542290000027*  
KFC National Management (assessment roll lists Donvein Cao & Nancy Nguyen) 07-10 assessments \$118.75, Block 1, Tracts 15 A & 16 A (north 10 ft. Lots 15 & 16) on Taft St.-0560410000001

**Paid in full:**

Upstairs Downstairs LLC \$425.71, *609 Colquitt St. – 0230620000013*  
Lucina Esparza Barrera 12 assessments \$125.81, *1639 Dunlavy St. – 0522770000002*

If you have any questions, please feel free to contact me.



Carl O. Sandin

PerdueBrandonFielderCollins&Mott LLP   
ATTORNEYS AT LAW

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**MONTROSE MANAGEMENT DISTRICT  
CITY OF HOUSTON  
HARRIS COUNTY, TEXAS**

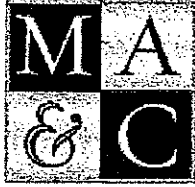
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**AGENDA MEMORANDUM**

**TO:** Montrose Management District Board of Directors  
**FROM:** Executive Director  
**SUBJECT:** Agenda Item Materials

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7. Receive and consider the District's monthly financial report including payment of invoices.



MUNICIPAL ACCOUNTS  
& CONSULTING, L.P.

## Montrose Management District

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### Bookkeeper's Report

July 13, 2015

**Montrose Management District**  
**Cash Flow Report - Checking Account**  
**As of July 13, 2015**

Num	Name	Memo	Amount	Balance
BALANCE AS OF 06/09/2015				\$5,735.09
<b>Receipts</b>				
	Interest earned on checking		8.41	
	Wire Transfer		30,000.00	
	Wire Transfer		100,000.00	
<b>Total Receipts</b>				130,008.41
<b>Disbursements</b>				
4777	Verizon Wireless	Cell Phone Expense	(80.08)	
4797	Boulevard Apartments, LLC	VOID: Assessment Refund	0.00	
4798	Boulevard Apartments, LLC	VOID: Assessment Refund	0.00	
4799	Boulevard Apartments, LLC	VOID: Assessment Refund	0.00	
4800	Boulevard Apartments, LLC	VOID: Assessment Refund	0.00	
4801	Boulevard Apartments, LLC	VOID: Assessment Refund	0.00	
4827	Bankcard Center	Credit Card Expenses	(784.78)	
4829	Verizon Wireless	Cell Phone Expense	(80.08)	
4884	Comcast	Office Expenses	(106.75)	
4886	Aaron M Day	Security Expense	(3,497.03)	
4887	Adalberto R Ramos	Security Expense	(656.78)	
4888	Brian M Alms	Security Expense	(397.10)	
4889	Chad J Wall	Security Expense	(231.26)	
4890	Charles Starks	Security Expense	(266.98)	
4891	Francisco R Gomez	Security Expense	(198.55)	
4892	John E Obenhaus	Security Expense	(1,863.37)	
4893	Joseph C Mabasa	Security Expense	(2,295.60)	
4894	Juan Arroyo	Security Expense	(2,179.63)	
4895	Juan J Chavez-Resendiz	Security Expense	(654.08)	
4896	Lec T Jaquarya	Security Expense	(3,004.95)	
4897	Leon Laureano	Security Expense	(1,613.98)	
4898	Ricardo Gonzales	Security Expense	(373.11)	
4899	Richard J Bass	Security Expense	(397.10)	
4900	Todd L Thibodeaux	Security Expense	(1,134.32)	
4901	Victor Besera	Security Expense / Coordinator Fee	(4,621.73)	
4902	2007 Museum Place LTD	Assessment Refund	(176.14)	
4903	4310 Yoakum Partners HIP	Assessment Refund	(57.75)	
4904	Campanile South LP	Assessment Refund	(138.13)	
4905	Thomas L. Chambers	Assessment Refund	(86.55)	
4906	Campanile South LP	Assessment Refund	(149.44)	
4907	Chelsea Medical Mgmt LLC	Assessment Refund	(103.80)	
4908	Corelogic Commercial Tax Service	Assessment Refund	(2,732.44)	
4909	G & A Group LLC	Assessment Refund	(93.91)	
4910	Glenmont Motors Inc	Assessment Refund	(236.07)	
4911	Landmark Industries LTD/ 7301	Assessment Refund	(370.37)	
4912	Plaza JJP LLC	Assessment Refund : Resissue Ck #4797	(77.01)	
4913	Plaza JJP LLC	Assessment Refund : Resissue Ck #4797	(14.96)	
4914	Plaza JJP LLC	Assessment Refund : Resissue Ck #4798	(263.39)	
4915	Plaza JJP LLC	Assessment Refund : Resissue Ck #4799	(28.66)	
4916	Plaza JJP LLC	Assessment Refund : Resissue Ck #4800	(366.25)	
4917	Plaza JJP LLC	Assessment Refund : Resissue Ck #4801	(155.99)	
4918	Shaw's Jewelry Ltd.	Assessment Refund	(55.45)	
4919	Bracewell & Giuliani LLP	Legal Fees - General Counsel	(909.00)	
4920	5020 Investments Ltd	Office Lease Expense	(1,200.00)	

**Montrose Management District**  
**Cash Flow Report - Checking Account**  
**As of July 13, 2015**

Num	Name	Memo	Amount	Balance
<b>Disbursements</b>				
4921	ALLY	Vehicle Lease	(938.00)	
4922	AM Signs & LED	Safety Signs	(750.00)	
4923	Amber Ambrose	Editorial Expense	(1,250.00)	
4924	Chris Labod	Website Maintenance	(350.00)	
4925	Hawes Hill Calderon, LLP	Consulting & Admin Fee	(19,633.61)	
4926	Cracked Fox	Graphic Design & Marketing Services	(2,500.00)	
4927	Dennis C. Beedon	Business Ambassador Program Services	(3,018.75)	
4928	Dero Bike Rack Co.	Bike Racks	(1,691.00)	
4929	e-Vision 1 Productions, LLC	MMD Photos & Video	(1,500.00)	
4930	Equi-Tax, Inc.	Tax Services	(1,652.70)	
4931	Gandy Squared Lighting Design	Bridge Lighting Design	(4,639.54)	
4932	Greater East End Management District	Graffiti Abatement Services	(5,760.00)	
4933	Harris County Treasurer	Legal Fees	(5,069.45)	
4934	Kudela & Weinheimer	District Identity Marker	(7,452.51)	
4935	Lawrence & Associates	Economic Development	(1,000.00)	
4936	Magoo's Print Shop	Marketing Expenses	(80.49)	
4937	Mr. Dirt of Texas	Street Sweeping Expense	(7,104.00)	
4938	Municipal Accounts & Consulting, L.P.	Bookkeeping Fees	(1,985.32)	
4939	Perdue Brandon, Fielder, Collins & Mott	Delinquent Tax Collections	(271.85)	
4940	SentiForce	Mobile Camera Program	(3,100.00)	
4941	SMC Logistics	Street Lights	(350.00)	
4942	Tawny Tidwell	Social Media Consulting Services	(3,500.00)	
4943	United Graphics	Newsletter	(79.00)	
4944	Bankcard Center	Credit Card Expense	0.00	
4945	Comcast	Office Expense	0.00	
4946	Verizon Wireless	Cell Phone Expense	0.00	
Wire	United States Treasury	Monthly Payroll Taxes	(7,752.98)	
<b>Total Disbursements</b>				(113,081.77)
<b>BALANCE AS OF 07/13/2015</b>				<u><u>\$22,661.73</u></u>



**Montrose Management District**

**Account Balances**

As of July 13, 2015

Financial Institution (Acct Number)	Issue Date	Maturity Date	Interest Rate	Account Balance	Notes
<b>Fund: Operating</b>					
<b>Certificates of Deposit</b>					
GREEN BANK (XXXX0143)	01/06/2015	08/04/2015	0.35 %	50,000.00	East Zone
GREEN BANK (XXXX0311)	02/03/2015	09/01/2015	0.35 %	50,000.00	East Zone
GREEN BANK (XXXX0210)	03/16/2015	10/13/2015	0.40 %	50,000.00	West Zone
POST OAK BANK (XXXX0889)	04/05/2015	02/29/2016	0.30 %	50,000.00	East Zone
POST OAK BANK (XXXX0897)	04/05/2015	02/29/2016	0.30 %	50,000.00	West Zone
ICON BANK (XXXX8030)	04/30/2015	03/25/2016	0.21 %	50,000.00	West Zone
ICON BANK (XXXX3030)	06/06/2015	04/01/2016	0.21 %	50,000.00	East Zone
GREEN BANK (XXXX0169)	07/06/2015	05/02/2016	0.45 %	50,000.00	East Zone
<b>Money Market Funds</b>					
COMPASS BANK-PREMIER (XXXX2019)	03/20/2012		0.15 %	529,853.87	(East Zone) Tax
COMPASS BANK-PREMIER (XXXX2086)	03/20/2012		0.15 %	952,858.95	(West Zone) Tax
<b>Checking Account(s)</b>					
TRADITION BANK (XXXX9069)			0.25 %	22,661.73	Checking Account
<b>Totals for Operating Fund:</b>				<b>\$1,905,374.55</b>	
<b>Grand total for Montrose Management District:</b>				<b>\$1,905,374.55</b>	

**Montrose Management District**  
**Summary of Pledged Securities**

As of July 13, 2015

<b>Financial Institution: COMPASS BANK-PREMIER</b>		
Total CDs, MM:	\$1,482,712.82	Collateral Security Required: Yes
Less FDIC coverage:	\$250,000.00	Collateral Security Agreement On File: Yes
Total pledged securities:	\$2,119,871.40	Investment Policy Received: Yes
Ratio of pledged securities to investments:	171.96 %	
<b>Financial Institution: GREEN BANK</b>		
Total CDs, MM:	\$200,000.00	Collateral Security Required: No
Less FDIC coverage:	\$250,000.00	Collateral Security Agreement On File: No
Total pledged securities:	\$0.00	Investment Policy Received: Yes
Ratio of pledged securities to investments:	N/A	
<b>Financial Institution: ICON BANK</b>		
Total CDs, MM:	\$100,000.00	Collateral Security Required: No
Less FDIC coverage:	\$250,000.00	Collateral Security Agreement On File: No
Total pledged securities:	\$0.00	Investment Policy Received: Yes
Ratio of pledged securities to investments:	N/A	
<b>Financial Institution: POST OAK BANK</b>		
Total CDs, MM:	\$100,000.00	Collateral Security Required: No
Less FDIC coverage:	\$250,000.00	Collateral Security Agreement On File: No
Total pledged securities:	\$0.00	Investment Policy Received: Yes
Ratio of pledged securities to investments:	N/A	
<b>Financial Institution: TRADITION BANK (Depository Bank)</b>		
Total CDs, MM, and Checking Accounts:	\$22,661.73	Collateral Security Required: No
Less FDIC coverage:	\$250,000.00	Collateral Security Agreement On File: Yes
Total pledged securities:	\$0.00	Investment Policy Received: Yes
Ratio of pledged securities to investments:	N/A	

Montrose Management District  
Revenue & Expenditures East Zone  
June 2015

Sources of Funds	Jun 15	Budget	\$ Over Budget	% of Budget	Jan - Jun 15	YTD Budget	\$ Over Budget	% of Budget	Annual Budget
14110 • Assessments	10,279	10,279	0	100%	607,007	594,860	12,147	102%	594,860
14112 • Assessment Refunds	(143)	583	(726)	(25%)	(1,060)	3,500	(4,560)	(30%)	7,000
14310 • Penalties & Interest	1,518	833	685	182%	6,659	5,000	1,659	133%	10,000
14370 • Interest Earned on Temp. Invest	150	100	50	150%	698	600	98	116%	1,200
14380 • Interest	8	3	5	267%	25	20	5	125%	40
14390 • Ending FY 2014 Fund Balance	30,872	30,872	0	100%	185,233	185,233	0	100%	370,466
14400-1 • Tradition Bank Loan.	0	0	0	0%	0	0	0	0%	700,000
14400 • Tradition Bank Loan	0	0	0	0%	0	0	0	0%	300,000
Total Sources	42,684	42,670	14	100%	798,562	789,213	9,349	101%	1,983,566
Uses of Funds									
Business Development									
16124 • Marketing & Public Rel Director	966	1,012	(46)	95%	5,582	6,071	(489)	92%	12,142
16125 • Marketing & Public Relations	3,921	8,979	(5,058)	44%	53,524	53,875	(351)	99%	107,750
16135 • Economic Development Services	321	1,224	(903)	26%	3,434	7,342	(3,908)	47%	14,683
16140 • Web Site Main./Host/I.T.	112	305	(193)	37%	9,632	1,830	7,802	526%	3,660
16141 • GIS Services	24	368	(344)	7%	154	2,208	(2,054)	7%	4,416
Total Business Development	5,344	11,888	(6,544)	45%	72,326	71,326	1,000	101%	142,051
Mobility & Transportation									
17010 • Engineering Services	0	2,667	(2,667)	0%	33,709	16,000	17,709	211%	32,000
17030 • Mobility Projects	0	0	0	0%	0	0	0	0%	300,000
Total Mobility & Transportation	0	2,667	(2,667)	0%	33,709	16,000	17,709	211%	332,000
Project Staffing & Admin									
16150 • Admin & Management	674	700	(26)	96%	4,043	4,200	(157)	96%	8,400
16160 • Reimbursable Expenses	34	427	(393)	8%	771	2,560	(1,789)	30%	5,120
16170 • Reimbursable Mileage	155	250	(95)	62%	1,030	1,500	(470)	69%	3,000
16180 • Postage, Deliveries	14	29	(15)	48%	214	173	41	124%	347
16190 • Printing & Reproduction	166	250	(84)	66%	948	1,500	(552)	63%	3,000
16200 • Public Notices, Advertising	0	213	(213)	0%	138	1,280	(1,142)	11%	2,560
16210 • Project Management	1,498	1,310	188	114%	8,986	7,862	1,124	114%	15,725
16215 • Director Of Services	2,157	2,259	(102)	95%	12,942	13,551	(609)	96%	27,102
16220 • Legal Services	1,913	1,850	63	103%	18,409	11,100	7,309	166%	22,200
16250 • Bookkeeping	530	413	117	128%	3,308	2,475	833	134%	4,950
16260 • Assesa Data Mgmt & Billing Svcs	1,058	575	483	184%	4,954	3,450	1,504	144%	6,900
16270 • Office Supplies	0	100	(100)	0%	0	600	(600)	0%	1,200
16280 • Other	21	15	6	140%	123	90	33	137%	180
16290 • Office Lease Space	388	585	(197)	66%	2,328	3,510	(1,182)	66%	7,020
16291 • Office Equipment	34	100	(66)	34%	366	600	(234)	61%	1,200
16340 • Auditing Fees	1,920	1,920	0	100%	3,072	3,600	(528)	85%	3,600
16530 • Insurance & Surety Bond	0	0	0	0%	3,135	4,800	(1,665)	65%	4,800
16600 • Payroll Expenses	2,268	3,200	(932)	71%	11,106	19,200	(8,094)	58%	38,400
Total Project Staffing & Admin	12,830	14,196	(1,366)	90%	75,873	82,051	(6,178)	92%	155,704

Montrose Management District  
Revenue & Expenditures East Zone  
June 2015

	Jun 15	Budget	\$ Over Budget	% of Budget	Jan - Jun 15	YTD Budget	\$ Over Budget	% of Budget	Annual Budget
<b>Security and Public Safety</b>									
15415 • Vehicle Maint. & Operations	300	350	(50)	86%	1,819	2,100	(281)	87%	4,200
15420 • Contract Public Safety Services	9,721	9,000	721	108%	49,002	54,000	(4,998)	91%	108,000
15425 • Mobile Camera Program	992	875	117	113%	4,395	5,250	(855)	84%	10,500
15430 • Cell Phone	0	50	(50)	0%	143	300	(157)	48%	600
16100 • Store Front Equipment	0	57	(57)	0%	0	340	(340)	0%	680
16102 • Public Safety Equipment	266	36	228	700%	387	225	162	172%	450
16110 • Graffiti Abatement	1,843	1,625	218	113%	10,445	9,730	695	107%	19,500
16115 • Nuisance Abatement	0	1,378	(1,378)	0%	0	8,269	(8,269)	0%	16,537
<b>Total Security and Public Safety</b>	<b>13,122</b>	<b>13,373</b>	<b>(251)</b>	<b>98%</b>	<b>66,191</b>	<b>80,234</b>	<b>(14,043)</b>	<b>82%</b>	<b>160,467</b>
<b>Visual Improvements &amp; Cultural</b>									
16212 • Beautification Design & Install	0	0	0	0%	11,846	12,000	(154)	99%	201,000
16213 • Landscape Maintenance	0	4,167	(4,167)	0%	9,583	25,000	(15,417)	38%	50,000
<b>Total Visual Improvements &amp; Cultural</b>	<b>0</b>	<b>4,167</b>	<b>(4,167)</b>	<b>0%</b>	<b>21,429</b>	<b>37,000</b>	<b>(15,571)</b>	<b>58%</b>	<b>251,000</b>
<b>Total Uses</b>	<b>31,296</b>	<b>46,291</b>	<b>(14,995)</b>	<b>68%</b>	<b>269,528</b>	<b>286,611</b>	<b>(17,083)</b>	<b>94%</b>	<b>1,041,822</b>
<b>Planned Reserves</b>	<b>11,388</b>	<b>(3,621)</b>	<b>15,009</b>	<b>(314%)</b>	<b>529,034</b>	<b>502,602</b>	<b>26,432</b>	<b>105%</b>	<b>941,744</b>

Montrose Management District  
Revenue & Expenditures West Zone  
June 2015

Sources of Funds	Jun 15	Budget	\$ Over Budget	% of Budget	Jan - Jun 15	YTD Budget	\$ Over Budget	% of Budget	Annual Budget
14110-1 - Assessments.	7,054	7,054	0	100%	1,317,328	1,317,328	0	100%	1,342,600
14112-1 - Assessment Refunds.	(8,435)	1,250	(9,685)	(675%)	(14,725)	7,500	(22,225)	(196%)	15,000
14310-1 - Penalties & Interest.	1,067	1,583	(516)	67%	8,087	9,500	(1,413)	85%	19,000
14370-1 - Interest Earned on Temp. Inves	149	125	24	119%	954	750	204	127%	1,500
14380-1 - Interest.	0	7	(7)	0%	35	43	(8)	81%	85
14390-1 - Ending FY 2014 Fund Balance.	46,021	46,021	0	100%	276,126	276,126	0	100%	552,251
14400-1 - Tradition Bank Loan.	0	0	0	0%	0	0	0	0%	700,000
14400 - Tradition Bank Loan	0	0	0	0%	0	0	0	0%	300,000
Total Sources	45,856	56,040	(10,184)	82%	1,587,805	1,611,247	(23,442)	99%	2,930,436
Uses of Funds									
Business Development									
16124-1 - Marketing & Public Rel Dir	2,045	2,150	(105)	95%	11,812	12,902	(1,090)	92%	25,803
16125-1 - Marketing & Public Relation	8,332	19,081	(10,749)	44%	113,851	114,485	(634)	99%	228,970
16135-1 - Economic Development Service	679	2,600	(1,921)	26%	7,281	15,601	(8,320)	47%	31,202
16140-1 - Web Site Main./Host/L.T..	238	712	(474)	33%	20,468	4,270	16,198	479%	8,540
16141-1 - GIS Services.	51	782	(731)	7%	328	4,692	(4,364)	7%	9,584
Total Business Development	11,345	25,325	(13,980)	45%	153,740	151,950	1,790	101%	303,899
Mobility & Transportation									
17010-1 - Engineering Services.	0	5,667	(5,667)	0%	71,632	34,000	37,632	211%	68,000
17030-1 - Mobility Projects.	0	0	0	0%	0	0	0	0%	700,000
Total Mobility & Transportation	0	5,667	(5,667)	0%	71,632	34,000	37,632	211%	768,000
Project Staffing & Admin									
16150-1 - Admin & Management	1,426	1,488	(62)	96%	8,557	8,925	(368)	96%	17,850
16160-1 - Reimbursable Expenses.	71	907	(836)	8%	1,638	5,440	(3,802)	30%	10,880
16170-1 - Reimbursable Mileage.	329	417	(88)	79%	2,188	2,500	(312)	88%	5,000
16180-1 - Postage, Deliveries	29	61	(32)	48%	454	368	86	123%	737
16190-1 - Printing & Reproduction	353	500	(147)	71%	2,016	3,000	(984)	67%	6,000
16200-1 - Public Notices, Advertising	0	453	(453)	0%	293	2,720	(2,427)	11%	5,440
16210-1 - Project Management	3,172	2,785	387	114%	19,029	16,708	2,321	114%	33,415
16215-1 - Director Of Services	4,565	4,799	(234)	95%	27,388	28,796	(1,408)	95%	57,591
16220-1 - Legal Services.	4,065	4,317	(252)	94%	39,122	25,900	13,222	151%	51,800
16250-1 - Bookkeeping.	1,126	963	163	117%	7,030	5,775	1,255	122%	11,550
16260-1 - Assess Data Mgmt & Billing Svc	2,248	1,342	906	168%	10,527	8,050	2,477	131%	16,100
16270-1 - Office Supplies.	0	233	(233)	0%	0	1,400	(1,400)	0%	2,800
16280-1 - Other.	24	35	(11)	69%	154	210	(56)	73%	420
16290-1 - Office Lease Space.	812	1,365	(553)	59%	4,872	8,190	(3,318)	59%	16,380
16291-1 - Office Equipment.	73	233	(160)	31%	779	1,400	(621)	56%	2,800
16340-1 - Auditing Fees.	4,080	4,080	0	100%	6,528	8,400	(1,872)	78%	8,400
16530-1 - Insurance & Surety Bond.	0	0	0	0%	6,661	10,200	(3,539)	65%	10,200
Total Project Staffing & Admin	22,373	25,978	(3,605)	93%	137,236	137,982	(746)	99%	257,363

Montrose Management District  
Revenue & Expenditures West Zone  
June 2015

	Jun 15	Budget	\$ Over Budget	% of Budget	Jan - Jun 15	YTD Budget	\$ Over Budget	% of Budget	Annual Budget
Security and Public Safety									
15415-1 - Vehicle Maint. & Operations.	638	817	(179)	78%	3,865	4,900	(1,035)	79%	9,800
15420-1 - Contract Public Safety Service	20,201	21,000	(799)	96%	98,143	126,000	(27,857)	78%	252,000
15425-1 - Mobile Camera Program.	2,108	2,042	66	103%	9,339	12,250	(2,911)	76%	24,500
15430-1 - Cell Phone.	0	117	(117)	0%	304	700	(396)	43%	1,400
16101-1 - Public Safety Training.	0	27	(27)	0%	0	160	(160)	0%	320
16102-1 - Public Safety Equipment.	564	88	476	641%	823	525	298	157%	1,050
16110-1 - Graffiti Abatement.	3,917	3,792	125	103%	22,195	22,750	(555)	98%	45,500
16115-1 - Nuisance Abatement.	0	3,216	(3,216)	0%	0	19,284	(19,284)	0%	38,588
Total Security and Public Safety	27,428	31,099	(3,671)	88%	134,669	186,579	(51,910)	72%	373,158
Visual Improvements & Cultural									
16212-1 - Identification Design & Install	0	39,083	(39,083)	0%	25,174	234,500	(209,326)	11%	469,000
Total Visual Improvements & Cultural	0	39,083	(39,083)	0%	25,174	234,500	(209,326)	11%	469,000
Total Uses	61,146	125,152	(64,006)	49%	522,451	745,011	(222,560)	70%	2,171,420
Planned Reserves	(15,290)	(69,112)	53,822	22%	1,065,354	866,236	199,118	123%	759,016

**Montrose Management District**  
**Revenue & Expenditures Total Zone**  
June 2015

Sources of Funds	June 15	Budget	\$ Over Budget	% of Budget	Jan - Jun 15	YTD Budget	\$ Over Budget	% of Budget	Annual Budget
14110 - Assessments Total	17,333	17,333	0	100%	1,924,335	1,912,188	12,147	101%	1,937,460
14112 - Assessment Refunds Total	(8,578)	1,833	(10,411)	(468%)	(15,785)	11,000	(26,785)	(144%)	22,000
14310 - Penalties & Interest Total	2,585	2,416	169	107%	14,746	14,500	246	102%	29,000
14370 - Interest Earned on Temp. Invest Total	299	225	74	133%	1,652	1,350	302	122%	2,700
14380 - Interest Total	8	10	(2)	80%	60	63	(3)	95%	125
14390 - Ending FY 2014 Fund Balance Total	76,893	76,893	0	100%	461,359	461,359	0	100%	922,717
14400 - Tradition Bank Loan Total	0	0	0	0%	0	0	0	0%	1,000,000
<b>Total Sources</b>	<b>88,540</b>	<b>98,710</b>	<b>(10,170)</b>	<b>90%</b>	<b>2,386,367</b>	<b>2,409,460</b>	<b>(14,093)</b>	<b>99%</b>	<b>3,914,002</b>
Uses of Funds									
Business Development									
16124 - Marketing & Public Rel Director Total	3,011	3,162	(151)	95%	17,394	18,973	(1,579)	92%	37,945
16125 - Marketing & Public Relations Total	12,253	28,060	(15,807)	44%	167,375	168,360	(985)	99%	336,720
16135 - Economic Development Services Total	1,080	3,824	(2,824)	28%	10,715	22,943	(12,228)	47%	45,885
16140 - Web Site Maint./Host/LT. Total	350	1,017	(667)	34%	30,100	6,100	24,000	493%	12,200
16141 - GIS Services Total	75	1,150	(1,075)	7%	482	6,900	(6,418)	7%	13,800
<b>Total Business Development</b>	<b>16,689</b>	<b>37,213</b>	<b>(20,524)</b>	<b>43%</b>	<b>226,066</b>	<b>223,276</b>	<b>2,790</b>	<b>101%</b>	<b>446,550</b>
Mobility & Transportation									
17010 - Engineering Services Total	0	8,334	(8,334)	0%	105,341	50,000	55,341	211%	100,000
17030 - Mobility Projects Total	0	0	0	0%	0	0	0	0%	1,000,000
<b>Total Mobility &amp; Transportation</b>	<b>0</b>	<b>8,334</b>	<b>(8,334)</b>	<b>0%</b>	<b>105,341</b>	<b>50,000</b>	<b>55,341</b>	<b>211%</b>	<b>1,100,000</b>
Project Staffing & Admin									
16150 - Admin & Management Total	2,100	2,188	(88)	96%	12,600	13,125	(525)	96%	26,250
16160 - Reimbursable Expenses Total	105	1,334	(1,229)	8%	2,409	8,000	(5,591)	30%	16,000
16170 - Reimbursable Mileage Total	484	667	(183)	73%	3,218	4,000	(782)	80%	8,000
16180 - Postage, Deliveries Total	43	90	(47)	48%	668	541	127	123%	1,084
16190 - Printing & Reproduction Total	519	750	(231)	69%	2,964	4,500	(1,536)	66%	9,000
16200 - Public Notices, Advertising Total	0	666	(666)	0%	431	4,000	(3,569)	11%	8,000
16210 - Project Management Total	4,670	4,095	575	114%	28,015	24,570	3,445	114%	49,140
16215 - Director Of Services Total	6,722	7,058	(336)	95%	40,330	42,347	(2,017)	95%	84,693
16220 - Legal Services Total	5,978	6,167	(189)	97%	57,531	37,000	20,531	155%	74,000
16250 - Bookkeeping Total	1,656	1,376	280	120%	10,338	8,250	2,088	125%	16,500
16260 - Assess Data Mgmt & Billing Svcs Total	3,306	1,917	1,389	172%	15,481	11,500	3,981	135%	23,000
16270 - Office Supplies Total	0	333	(333)	0%	0	2,000	(2,000)	0%	4,000
16280 - Other Total	45	50	(5)	90%	277	300	(23)	92%	600
16290 - Office Lease Space Total	1,200	1,950	(750)	62%	7,200	11,700	(4,500)	62%	23,400
16291 - Office Equipment Total	107	333	(226)	32%	1,145	2,000	(855)	57%	4,000
16340 - Auditing Fees Total	6,000	6,000	0	100%	9,600	12,000	(2,400)	80%	12,000
16530 - Insurance & Surety Bond Total	0	0	0	0%	9,796	15,000	(5,204)	65%	15,000
16600 - Payroll Expenses Total	2,268	3,200	(932)	71%	11,106	19,200	(8,094)	58%	38,400
<b>Total Project Staffing &amp; Admin</b>	<b>35,203</b>	<b>38,174</b>	<b>(2,971)</b>	<b>92%</b>	<b>213,109</b>	<b>220,033</b>	<b>(6,924)</b>	<b>97%</b>	<b>413,067</b>

Montrose Management District  
Revenue & Expenditures Total Zone  
June 2015

	June 15	Budget	\$ Over Budget	% of Budget	Jan - Jun 15	YTD Budget	\$ Over Budget	% of Budget	Annual Budget
<b>Security and Public Safety</b>									
15415 - Vehicle Maint. & Operations Total	938	1,167	(229)	80%	5,684	7,000	(1,316)	81%	14,000
15420 - Contract Public Safety Services Total	29,922	30,000	(78)	100%	147,145	180,000	(32,855)	82%	360,000
15425 - Mobile Camera Program Total	3,100	2,917	183	106%	13,734	17,500	(3,766)	78%	35,000
15430 - Cell Phone Total	0	167	(167)	0%	447	1,000	(553)	45%	2,000
16100 - Store Front Equipment Total	0	57	(57)	0%	0	340	(340)	0%	680
16101-1 - Public Safety Training Total	0	27	(27)	0%	0	160	(160)	0%	320
16102 - Public Safety Equipment Total	830	126	704	659%	1,210	750	460	161%	1,500
16110 - Graffiti Abatement Total	5,760	5,417	343	106%	32,640	32,500	140	100%	65,000
16115 - Nuisance Abatement Total	0	4,594	(4,594)	0%	0	27,563	(27,563)	0%	55,125
Total Security and Public Safety	40,550	44,472	(3,922)	91%	200,860	266,813	(65,953)	75%	533,625
<b>Visual Improvements &amp; Cultural</b>									
16212 - Beautification Design & Install Total	0	39,083	(39,083)	0%	37,020	246,500	(209,480)	15%	670,000
16213 - Landscape Maintenance Total	0	4,167	(4,167)	0%	9,583	25,000	(15,417)	38%	50,000
Total Visual Improvements & Cultural	0	43,250	(43,250)	0%	46,603	271,500	(224,897)	17%	720,000
Total Uses	92,442	171,443	(79,001)	54%	791,879	1,031,622	(239,643)	77%	3,213,242
Planned Reserves	(3,902)	(72,733)	68,831	5%	1,594,388	1,568,838	25,550	110%	700,760







**Equi-Tax Inc.**  
Ad Valorem Tax Assessors / Collectors

www.equitaxinc.com

17111 Rolling Creek Drive, Suite 200, Houston, Texas 77060  
P.O. Box 73109, Houston, Texas 77273  
Customer Service 281.444.3946 fax 281.440.8304

DATE: 06/12/2015

LEGAL DESCRIPTION

2007 MUSEUM PLACE LTD  
9601 KATY FWY STE 475  
HOUSTON TX 77024-1347

LT 7 & TRS 6 8A 11B & 12A  
BLK 34  
TURNER N P

1116 BANKS ST 24

MONTROSE MD WEST

ACCOUNT NUMBER: 94/036/040/000/0006  
TAX YEAR: 2014  
REF No.: 0888258

DATE PROCESSED: 06/12/2015  
RECEIPT NUMBER: 94140265  
DEPOSIT BATCH No.: RFI50612

**NOTICE OF CHANGE IN TAX LIABILITY**

We have been notified by the Appraisal District of a change in the appraisal of your property that has resulted in a change in your tax liability for the 2014 tax year.

The explanation of the change is:

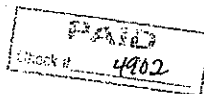
- ☐ Decrease in Appraised Value
- ☐ Exemption(s) Added
- ☐ Homestead
- ☐ Over 65
- ☐ Disabled Person
- ☐ Disabled Veteran

- ☐ Account Prorated
- ☐ Account Deleted
- ☐ Rendition Penalty Waived
- ☒ Other: CAUSE 2013-62348

This action has resulted in a decrease in the amount of tax you owe. Accordingly, we are issuing you a refund in the amount of \$91.38.

Note: Questions regarding changes in value should be directed to the Appraisal District.

If you need more information, call Customer Service at 281.444.3946.



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DATE: 06/12/2015

LEGAL DESCRIPTION

2007 MUSEUM PLACE LTD  
9601 KATY FWY STE 475  
HOUSTON TX 77024-1347

LT 7 & TRS 6 8A 11B & 12A  
BLK 34  
TURNER N P

1116 BANKS ST 24

MONTROSE MD WEST

ACCOUNT NUMBER: 94/036/040/000/0006  
TAX YEAR: 2013  
REF No.: 0888257

DATE PROCESSED: 06/12/2015  
RECEIPT NUMBER: 94130272  
DEPOSIT BATCH No.: RFI50612

**NOTICE OF CHANGE IN TAX LIABILITY**

We have been notified by the Appraisal District of a change in the appraisal of your property that has resulted in a change in your tax liability for the 2013 tax year.

The explanation of the change is:

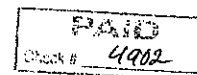
- ☐ Decrease in Appraised Value
- ☐ Exemption(s) Added
- ☐ Homestead
- ☐ Over 65
- ☐ Disabled Person
- ☐ Disabled Veteran

- ☐ Account Prorated
- ☐ Account Deleted
- ☐ Rendition Penalty Waived
- ☒ Other: CAUSE 2013-62348

This action has resulted in a decrease in the amount of tax you owe. Accordingly, we are issuing you a refund in the amount of \$84.76.

Note: Questions regarding changes in value should be directed to the Appraisal District.

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Customer Service 281.444.3946 fax 281.440.8304

MONTROSE MD EAST  
DATE: 06/03/2015  
TAX YEAR: 2014

OVERPAYMENT: \$57.75  
DEPOSIT BATCH No.: 92-392  
RECEIPT NUMBER: 92140233

OWNER NAME: 4310 YOKUM PARTNERS HIP

CHECK NO.: 799496238

ACCOUNT NUMBER: 92/026/135/000/0014

DATE OF PAYMENT: 05/31/2015

PAID BY: 700729

LEGAL DESCRIPTION

TEXAS AMERICAN TITLE CO  
2500 WEST LOOP SOUTH #400  
HOUSTON TX 77027

LTS 14 15 & 16 BLK 9  
MONTROSE

510 LOVETT BLVD

**NOTICE OF OVERPAYMENT OF TAX**

DISTRICT NAME  
MONTROSE MD EAST

OVERPAYMENT AMOUNT  
\$57.75

REASON: paid June amount with may postmark

AMOUNT OF CHECK: \$3,320.75

CHECK NO.: 799496238

AMOUNT APPLIED: \$3,263.00

Ref No.: 7994152262

DIFFERENCE: \$57.75

COMPLETED BY: [Signature]

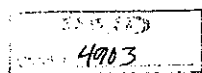
DATE: 6-3

Make refund payable to:

Address:

City: State: Zip:

If you need more information, call Customer Service at 281.444.3946.



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Ad Valorem Tax Assessors / Collectors

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17111 Rolling Creek Drive, Suite 200, Houston, Texas 77060  
P.O. Box 73109, Houston, Texas 77273  
Customer Service 281.444.3946 fax 281.440.8304

DATE: 05/26/2015

LEGAL DESCRIPTION

CAMPANILE SOUTH LP  
4301 MOUNT VERNON ST STE 26  
HOUSTON TX 77006-5801

LTS 23 24 & 25 & TR B BLK 2  
ROSSMOYNE

4301 MOUNT VERNON ST 26

MONTROSE MD EAST

ACCOUNT NUMBER: 92/030/246/000/0023  
TAX YEAR: 2012  
REF No.: 0888091

DATE PROCESSED: 05/26/2015  
RECEIPT NUMBER: 12104477  
DEPOSIT BATCH No.: RFI50526

**NOTICE OF CHANGE IN TAX LIABILITY**

We have been notified by the Appraisal District of a change in the appraisal of your property that has resulted in a change in your tax liability for the 2012 tax year.

The explanation of the change is:

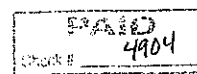
- ☐ Decrease in Appraised Value
- ☐ Exemption(s) Added
- ☐ Homestead
- ☐ Over 65
- ☐ Disabled Person
- ☐ Disabled Veteran

- ☐ Account Prorated
- ☐ Account Deleted
- ☐ Rendition Penalty Waived
- ☒ Other: CAUSE 2012-25934

This action has resulted in a decrease in the amount of tax you owe. Accordingly, we are issuing you a refund in the amount of \$92.04.

Note: Questions regarding changes in value should be directed to the Appraisal District.

If you need more information, call Customer Service at 281.444.3946.





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17111 Rolling Creek Drive, Suite 200, Houston, Texas 77090  
P.O. Box 73109, Houston, Texas 77273  
Customer Service 281.444.3946 fax 281.440.8304

DATE: 05/26/2015

LEGAL DESCRIPTION

CAMPANILE SOUTH LP  
4301 MOUNT VERNON ST STE 26  
HOUSTON TX 77006-5801

LTS 23 24 & 25 & TR B BLK 2  
ROSSMOYNE

4301 MOUNT VERNON ST 26

MONTROSE MD EAST

ACCOUNT NUMBER: 92/030/246/000/0023  
TAX YEAR: 2013  
REF No.: 0888092

DATE PROCESSED: 05/26/2015  
RECEIPT NUMBER: 92130328  
DEPOSIT BATCH No.: RPI50526

**NOTICE OF CHANGE IN TAX LIABILITY**

We have been notified by the Appraisal District of a change in the appraisal of your property that has resulted in a change in your tax liability for the 2013 tax year.

The explanation of the change is:

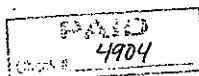
- ☐ Decrease in Appraised Value
- ☐ Exemption(s) Added
  - ☐ Homestead
  - ☐ Over 65
  - ☐ Disabled Person
  - ☐ Disabled Veteran

- ☐ Account Prorated
- ☐ Account Deleted
- ☒ Rendition Penalty Waived
- Other: cause 503-25236

This action has resulted in a decrease in the amount of tax you owe. Accordingly, we are issuing you a refund in the amount of \$46.09.

Note: Questions regarding changes in value should be directed to the Appraisal District.

If you need more information, call Customer Service at 281.444.3946.



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Ad Valorem Tax Assessors / Collectors

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17111 Rolling Creek Drive, Suite 200, Houston, Texas 77090  
P.O. Box 73109, Houston, Texas 77273  
Customer Service 281.444.3946 fax 281.440.8304

DATE: 06/12/2015

LEGAL DESCRIPTION

CHAMBERS THOMAS L  
10 WOODS EDGE LN  
HOUSTON TX 77024-7525

LT 6 BLK 13  
WINLOW PLACE

1821 MARSHALL ST 6

MONTROSE MD WEST

ACCOUNT NUMBER: 94/054/229/000/0006  
TAX YEAR: 2014  
REF No.: 0888259

DATE PROCESSED: 06/12/2015  
RECEIPT NUMBER: 94140618  
DEPOSIT BATCH No.: RPI50612

**NOTICE OF CHANGE IN TAX LIABILITY**

We have been notified by the Appraisal District of a change in the appraisal of your property that has resulted in a change in your tax liability for the 2014 tax year.

The explanation of the change is:

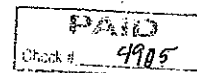
- ☐ Decrease in Appraised Value
- ☐ Exemption(s) Added
  - ☐ Homestead
  - ☐ Over 65
  - ☐ Disabled Person
  - ☐ Disabled Veteran

- ☐ Account Prorated
- ☐ Account Deleted
- ☒ Rendition Penalty Waived
- Other: cause 161-1400507

This action has resulted in a decrease in the amount of tax you owe. Accordingly, we are issuing you a refund in the amount of \$86.55.

Note: Questions regarding changes in value should be directed to the Appraisal District.

If you need more information, call Customer Service at 281.444.3946.



**Equi-Tax Inc.**  
Ad Valorem Tax Assessors / Collectors

www.equitaxinc.com

17111 Rolling Creek Drive, Suite 200, Houston, Texas 77090  
P.O. Box 73109, Houston, Texas 77273  
Customer Service 281.444.3946 fax 281.440.8304

DATE: 05/26/2015

LEGAL DESCRIPTION

CAMPANILE SOUTH LP  
109 N POST OAK LN STE 200  
HOUSTON TX 77024-7789

TRS 1B 2B & TR A BLK 2  
ROSEWOYNE

4306 YOKUM BLVD 16

MONTROSE MD EAST

ACCOUNT NUMBER: 92/030/246/000/0026  
TAX YEAR: 2013  
REF No.: 0888093

DATE PROCESSED: 05/26/2015  
RECEIPT NUMBER: 92130329  
DEPOSIT BATCH No.: RPI50526

**NOTICE OF CHANGE IN TAX LIABILITY**

We have been notified by the Appraisal District of a change in the appraisal of your property that has resulted in a change in your tax liability for the 2013 tax year.

The explanation of the change is:

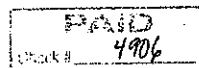
- ☐ Decrease in Appraised Value
- ☐ Exemption(s) Added
  - ☐ Homestead
  - ☐ Over 65
  - ☐ Disabled Person
  - ☐ Disabled Veteran

- ☐ Account Prorated
- ☐ Account Deleted
- ☒ Rendition Penalty Waived
- Other: cause 2013-25236

This action has resulted in a decrease in the amount of tax you owe. Accordingly, we are issuing you a refund in the amount of \$129.49.

Note: Questions regarding changes in value should be directed to the Appraisal District.

If you need more information, call Customer Service at 281.444.3946.



**Equi-Tax Inc.**  
Ad Valorem Tax Assessors / Collectors

www.equitaxinc.com

17111 Rolling Creek Drive, Suite 200, Houston, Texas 77090  
P.O. Box 73109, Houston, Texas 77273  
Customer Service 281.444.3946 fax 281.440.8304

DATE: 06/12/2015

LEGAL DESCRIPTION

CAMPANILE SOUTH LP  
109 N POST OAK LN STE 200  
HOUSTON TX 77024-7789

TRS 1A & 26 BLK 2  
ROSSMOYNE

RICHMOND

MONTROSE MD EAST

ACCOUNT NUMBER: 92/030/246/000/0001  
TAX YEAR: 2013  
REF No.: 0888247

DATE PROCESSED: 06/12/2015  
RECEIPT NUMBER: 92130322  
DEPOSIT BATCH No.: RPI50612

**NOTICE OF CHANGE IN TAX LIABILITY**

We have been notified by the Appraisal District of a change in the appraisal of your property that has resulted in a change in your tax liability for the 2013 tax year.

The explanation of the change is:

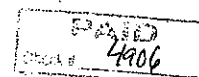
- ☐ Decrease in Appraised Value
- ☐ Exemption(s) Added
  - ☐ Homestead
  - ☐ Over 65
  - ☐ Disabled Person
  - ☐ Disabled Veteran

- ☐ Account Prorated
- ☐ Account Deleted
- ☒ Rendition Penalty Waived
- Other: cause 2013-12100

This action has resulted in a decrease in the amount of tax you owe. Accordingly, we are issuing you a refund in the amount of \$9.01.

Note: Questions regarding changes in value should be directed to the Appraisal District.

If you need more information, call Customer Service at 281.444.3946.





**Equi-Tax Inc.**  
Ad Valorem Tax Assessors / Collectors

www.equitaxinc.com

17111 Rolling Creek Drive, Suite 200, Houston, Texas 77090  
P.O. Box 73109, Houston, Texas 77273  
Customer Service 281.444.3946 fax 281.440.8304

DATE: 06/12/2015

LEGAL DESCRIPTION

CAMPANILE SOUTH LP  
109 N POST OAK LN STE 200  
HOUSTON TX 77024-7789

TR 1A-1 BLK 2  
ROSEMORNE

RICHMOND

MONTROSE MD EAST

ACCOUNT NUMBER: 92/030/246/000/0041  
TAX YEAR: 2013  
REF No.: 0888248

DATE PROCESSED: 06/12/2015  
RECEIPT NUMBER: 92130330  
DEPOSIT BATCH No.: RF150612

**NOTICE OF CHANGE IN TAX LIABILITY**

We have been notified by the Appraisal District of a change in the appraisal of your property that has resulted in a change in your tax liability for the 2013 tax year.

The explanation of the change is:

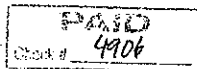
- ☐ Decrease in Appraised Value
- ☐ Exemption(s) Added
  - ☐ Homestead
  - ☐ Over 65
  - ☐ Disabled Person
  - ☐ Disabled Veteran

- ☐ Account Prorated
- ☐ Account Deleted
- ☐ Rendition Penalty Waived
- ☒ Other: Cause 2013-72100

This action has resulted in a decrease in the amount of tax you owe. Accordingly, we are issuing you a refund in the amount of \$10.94.

Note: Questions regarding changes in value should be directed to the Appraisal District.

If you need more information, call Customer Service at 281.444.3946.



**Equi-Tax Inc.**  
Ad Valorem Tax Assessors / Collectors

www.equitaxinc.com

17111 Rolling Creek Drive, Suite 200, Houston, Texas 77090  
P.O. Box 73109, Houston, Texas 77273  
Customer Service 281.444.3946 fax 281.440.8304

DATE: 06/12/2015

LEGAL DESCRIPTION

CHELSEA MEDICAL MGMT LLC  
3102 NOTTINGHAM ST  
HOUSTON TX 77005-2330

TRS 3 4 & 5 BLK 10  
SOUTH END VILLA

2 CHELSEA BLVD

MONTROSE MD WEST

ACCOUNT NUMBER: 94/033/200/000/0004  
TAX YEAR: 2013  
REF No.: 0888255

DATE PROCESSED: 06/12/2015  
RECEIPT NUMBER: 94130238  
DEPOSIT BATCH No.: RF150612

**NOTICE OF CHANGE IN TAX LIABILITY**

We have been notified by the Appraisal District of a change in the appraisal of your property that has resulted in a change in your tax liability for the 2013 tax year.

The explanation of the change is:

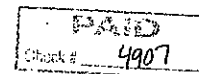
- ☐ Decrease in Appraised Value
- ☐ Exemption(s) Added
  - ☐ Homestead
  - ☐ Over 65
  - ☐ Disabled Person
  - ☐ Disabled Veteran

- ☐ Account Prorated
- ☐ Account Deleted
- ☐ Rendition Penalty Waived
- ☒ Other: Cause 2013-142163

This action has resulted in a decrease in the amount of tax you owe. Accordingly, we are issuing you a refund in the amount of \$53.91.

Note: Questions regarding changes in value should be directed to the Appraisal District.

If you need more information, call Customer Service at 281.444.3946.



**Equi-Tax Inc.**  
Ad Valorem Tax Assessors / Collectors

www.equitaxinc.com

17111 Rolling Creek Drive, Suite 200, Houston, Texas 77090  
P.O. Box 73109, Houston, Texas 77273  
Customer Service 281.444.3946 fax 281.440.8304

DATE: 06/12/2015

LEGAL DESCRIPTION

CHELSEA MEDICAL MGMT LLC  
3102 NOTTINGHAM ST  
HOUSTON TX 77005-2330

TRS 3 4 & 5 BLK 10  
SOUTH END VILLA

2 CHELSEA BLVD

MONTROSE MD WEST

ACCOUNT NUMBER: 94/033/200/000/0004  
TAX YEAR: 2014  
REF No.: 0888256

DATE PROCESSED: 06/12/2015  
RECEIPT NUMBER: 94140231  
DEPOSIT BATCH No.: RF150612

**NOTICE OF CHANGE IN TAX LIABILITY**

We have been notified by the Appraisal District of a change in the appraisal of your property that has resulted in a change in your tax liability for the 2014 tax year.

The explanation of the change is:

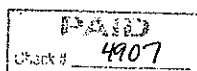
- ☐ Decrease in Appraised Value
- ☐ Exemption(s) Added
  - ☐ Homestead
  - ☐ Over 65
  - ☐ Disabled Person
  - ☐ Disabled Veteran

- ☐ Account Prorated
- ☐ Account Deleted
- ☐ Rendition Penalty Waived
- ☒ Other: Cause 2013-142163

This action has resulted in a decrease in the amount of tax you owe. Accordingly, we are issuing you a refund in the amount of \$49.89.

Note: Questions regarding changes in value should be directed to the Appraisal District.

If you need more information, call Customer Service at 281.444.3946.



**SECOND PAYMENT NOTICE**

HARRIS COUNTY IMP DISTRICT 6  
DATE: 01/27/2011  
TAX YEAR: 2010

SECOND PAYMENT NO: 08-83137  
DEPOSIT BATCH No.: 92-165  
RECEIPT NUMBER: 92000436

OWNER NAME: 515 WESTHEIMER LP

CHECK NO.: 6061778

ACCOUNT NUMBER: 92/121/369/001/0001

DATE OF PAYMENT: 01/27/2011

PAID BY: 650036

LEGAL DESCRIPTION

CORELOGIC COMMERCIAL REAL ES  
PO BOX 167928  
IRVING TX 75016

RBS A BLK 1  
SAGE PLAZA WESTHEIMER STANFORD

515 WESTHEIMER RD

DISTRICT NAME OVERPAYMENT AMOUNT  
HARRIS COUNTY IMP DISTRICT 6 2,732.44  
Amount of Refund: 2,732.44

600548

AMOUNT OF CHECK: 2,732.44 CHECK NO: 6061778

AMOUNT APPLIED: .00 Ref No.: 30256111

DIFFERENCE: 2,732.44

COMPLETED BY: g DATE: 1-27-11

FIRST PAYMENT RECEIVED FROM: OWNER

DATE PAID: 12/22/2010 DEPOSIT# 92-155 CHECK# 1415

**DISPOSITION OF OVERPAYMENT**

REFUND TO: Corelogic Commercial Tax Service DATE: 1-16

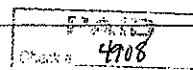
Address: P.O. Box 961009

Address:

City: Ft Worth State: TX Zip: 76161

APPLIED TO ACCT#

DATE:





**Equi-Tax Inc.**  
Ad Valorem Tax Assessors / Collectors

www.equitaxinc.com

17111 Rolling Creek Drive, Suite 200, Houston, Texas 77090  
P.O. Box 73109, Houston, Texas 77273  
Customer Service 281.444.3946 Fax 281.440.8304

DATE: 05/26/2015

LEGAL DESCRIPTION

G & A GROUP LLC  
1749 RICHMOND AVE  
HOUSTON TX 77098-3603

TRS 3A 4 5 6 9A 10A 11A & 12A  
BLK 2  
RICHWOOD  
1739 RICHMOND AVE

MONTROSE MD WEST

ACCOUNT NUMBER: 94/066/087/002/0003  
TAX YEAR: 2013  
REF No.: 0888099

DATE PROCESSED: 05/26/2015  
RECEIPT NUMBER: 94130763  
DEPOSIT BATCH No.: RF150526

**NOTICE OF CHANGE IN TAX LIABILITY**

We have been notified by the Appraisal District of a change in the appraisal of your property that has resulted in a change in your tax liability for the 2013 tax year.

The explanation of the change is:

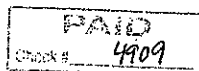
☐ Decrease in Appraised Value  
☐ Exemption(s) Added  
☐ Homestead  
☐ Over 65  
☐ Disabled Person  
☐ Disabled Veteran

☐ Account Prorated  
☐ Account Deleted  
☐ Rendition Penalty Waived  
Other: Cause 2013-14770

This action has resulted in a decrease in the amount of tax you owe. Accordingly, we are issuing you a refund in the amount of \$93.91.

Note: Questions regarding changes in value should be directed to the Appraisal District.

If you need more information, call Customer Service at 281.444.3946.



**Equi-Tax Inc.**  
Ad Valorem Tax Assessors / Collectors

www.equitaxinc.com

17111 Rolling Creek Drive, Suite 200, Houston, Texas 77090  
P.O. Box 73109, Houston, Texas 77273  
Customer Service 281.444.3946 Fax 281.440.8304

DATE: 06/12/2015

LEGAL DESCRIPTION

GLENMONT MOTORS INC  
1303 MONTROSE BLVD  
HOUSTON TX 77019-4233

LTS 1 & 2 BLK 4  
COLUMBUS  
1303 MONTROSE BLVD 6

MONTROSE MD EAST

ACCOUNT NUMBER: 92/010/168/000/0001  
TAX YEAR: 2014  
REF No.: 0888246

DATE PROCESSED: 06/12/2015  
RECEIPT NUMBER: 14107910  
DEPOSIT BATCH No.: RF150612

**NOTICE OF CHANGE IN TAX LIABILITY**

We have been notified by the Appraisal District of a change in the appraisal of your property that has resulted in a change in your tax liability for the 2014 tax year.

The explanation of the change is:

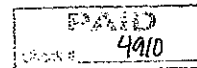
☐ Decrease in Appraised Value  
☐ Exemption(s) Added  
☐ Homestead  
☐ Over 65  
☐ Disabled Person  
☐ Disabled Veteran

☐ Account Prorated  
☐ Account Deleted  
☐ Rendition Penalty Waived  
Other: Cause 14-1400562

This action has resulted in a decrease in the amount of tax you owe. Accordingly, we are issuing you a refund in the amount of \$236.07.

Note: Questions regarding changes in value should be directed to the Appraisal District.

If you need more information, call Customer Service at 281.444.3946.



**Equi-Tax Inc.**  
Ad Valorem Tax Assessors / Collectors

www.equitaxinc.com

17111 Rolling Creek Drive, Suite 200, Houston, Texas 77090  
P.O. Box 73109, Houston, Texas 77273  
Customer Service 281.444.3946 Fax 281.440.8304

DATE: 06/16/2015

LEGAL DESCRIPTION

LANDMARK INDUSTRIES LTD/7301  
4 TIER WISE # 7301  
11111 WILCREST GREEN DR STE 10  
HOUSTON TX 77042-4739

LTS 1 2 3 & 5 & TRS 4 & 17  
BLK 1  
COLUMBUS  
1802 MONTROSE BLVD

MONTROSE MD WEST

ACCOUNT NUMBER: 94/010/165/000/0001  
TAX YEAR: 2014  
REF No.: 0888321

DATE PROCESSED: 06/16/2015  
RECEIPT NUMBER: 94140001  
DEPOSIT BATCH No.: RF150616

**NOTICE OF CHANGE IN TAX LIABILITY**

We have been notified by the Appraisal District of a change in the appraisal of your property that has resulted in a change in your tax liability for the 2014 tax year.

The explanation of the change is:

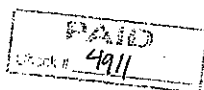
☐ Decrease in Appraised Value  
☐ Exemption(s) Added  
☐ Homestead  
☐ Over 65  
☐ Disabled Person  
☐ Disabled Veteran

☐ Account Prorated  
☐ Account Deleted  
☐ Rendition Penalty Waived  
Other: Cause 2014-53420

This action has resulted in a decrease in the amount of tax you owe. Accordingly, we are issuing you a refund in the amount of \$370.37.

Note: Questions regarding changes in value should be directed to the Appraisal District.

If you need more information, call Customer Service at 281.444.3946.



**WILSON & FRANCO**  
REAL PROPERTY ANALYSTS | PROPERTY TAX CONSULTANTS

June 11, 2015

Sharon Ritter  
Kenneth Byrd  
17111 Rolling Creek Drive, Suite 200  
Houston, TX 77090

RE: Cause No. 2014-51104; Boulevard Apartments, LLC, Calder 21, LLC ET AL, Plaza JJP, LLC ET AL and Baywood Project, LTD, v. Harris County Appraisal District; In the 61<sup>st</sup> Judicial District Court of Harris County, Texas

Sharon:

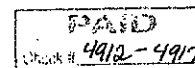
Enclosed please find the refund checks from our client Pennington Chen Interests, LLC. Per our conversation, our client is requesting to have these checks reissued with the proper legal name to each account due a refund. They were unable to deposit these checks with their banks because of the payee names. Please see the legal owner name for each account below.

Account #	Legal Owner Name	Refund Amount
0442220000110	Plaza JJP LLC	\$77.01
0442220000158	Plaza JJP LLC	\$14.96
0442220000157	Plaza JJP LLC	\$263.39
0442220000170	Plaza JJP LLC	\$28.68
0442250000030	Plaza JJP LLC	\$366.25
0442250000140	Plaza JJP LLC	\$155.99

Once these refunds have been approved and reissued, please mail them directly to Jason Pennington at Pennington Chen Interests, LLC at 1120 Bay Area Blvd, Houston, TX 77058. If you have any questions or concerns regarding the attached, please do not hesitate to contact me.

Thank you,

*Carla J. Saldaña*  
Carla J. Saldaña  
National Accts. Records Management  
Property Tax Consultant





# AM SIGNS & LED

14031 SCHILLER Rd  
HOUSTON, TX 77082  
PHONE: 281-596-6789 FAX: 281-596-6798  
EMAIL: dory@amersigns.com

## Invoice

Date	Invoice
6/19/2015	2017

Montrose Management District  
11560 BELLAIRE BLVD, # 960  
HOUSTON, TX 77072

Montrose Management District  
11560 BELLAIRE BLVD, # 960  
HOUSTON, TX 77072

Item	Qty	Unit Price	Total Price	Tax	Total Tax
FABRICATED	15.00				
FABRICATED 30 SAFETY SIGNS	30				
					750.00
<div>PAID 4922</div>					
<div>WARRANTY: ONE YEAR ON CRAFTSMANSHIP/PARTS AND ELECTRICAL</div>					
Subtotal					\$750.00
Sales Tax					\$0.00
Payments/Credits					\$0.00
Balance Due					\$750.00
Total					\$750.00

## INVOICE

Amber Ambrose  
6431 Fairwood Dr.  
Houston, TX 77088

amber@amberambrose.com  
361.813.6681  
amberambrose.com

Client:  
Montrose Management District  
PO Box 22167  
Houston 77227-2167  
Invoice #231

Date:  
July 1, 2015

Project Description:  
Editorial Services

Hourly Charges or Project Fee:  
\$1250/month

Additional Charges or Reimbursements:  
\$0

Adjustments:  
\$0

Total Fee Due:  
\$1250

Please send check to addressee/address above OR PayPal funds to  
amber@amberambrose.com. Thank you for your patronage!

PAID 4923



Chris Labod  
2502 Deer Forest Dr  
Spring TX 77373  
(281)-658-8741

Montrose Management District  
5020 Montrose, Suite 311  
Houston TX 77006

## Invoice

Jul 02, 2015  
Invoice # 2015-07-305  
Website Maintenance

Item	hrs / qty	rate / price	taxes	subtotal
MMD Website Maintenance	00.00	\$350.00		\$350.00
Monthly retainer for Montrose Management District website maintenance				

PAID 4924

Subtotal \$350.00  
Total due by Jul 16, 2015 \$350.00



hello! you have an invoice from:

Cracked Fox  
14715 Carriage Park Dr. Humble, TX 77396  
foan@CrackedFox.com | 832.364.4012 | www.CrackedFox.com

Bill To:

Montrose Management District  
Attn: Gretchen Larson  
5020 Montrose Blvd., Suite 311

Date	Invoice No.	Terms
06/11/15	644	Net 30
Payments/Credits	Balance Due	
\$0.00	\$2,600.00	

Item	Description	Quantity	Rate	Amount
marketing	marketing, graphic design and photography, research, meetings and other... for the month of May			0.00
Design	Print and web based designs for Summer Mixer; postcard, flyer, cover image, boost ad, e-nl ad, recreate Boheme logo for print based collateral.	0.2	75.00	690.00
Design	Wikkipedia page for District	16.8	75.00	1,260.00
Design	Print update to Lock, Tab, Hide signage	2.5	75.00	187.50
1	Branding, Marketing and Research including logo quality assurance in usage and recreation of logos used in district print collateral.	0.2	75.00	15.00
2	Editing, proof reading, and checking for website, information/hyperlink integrity	0.2	75.00	15.00
3	Meetings, Correspondence, Phone Calls, and Invoicing.	1.2	75.00	90.00
4	Photography: editing (color correction, airbrushing, cropping etc.) for use in web and print collateral. Captioning and Keywording of galleries for district usage and external search engines. Archiving district images to external harddrives, websites, and DVDs for backup.	2.3	75.00	172.50
5	Providing licensing, stock photography, and partner requests and print requests.	0.2	75.00	15.00
6	Social media: Facebook/twitter/pinterest/Instagram updates, photogalleries, posting, tagging, creation of cover photos. Backup monitoring of Facebook, with response and interaction with visitors requests/questions.			
	Print and Web resolution creation of files in proper	1	75.00	75.00

Thank you for your business

PAID 4924

Total



hello! you have an invoice from:  
**Cracked Fox**  
 14715 Carriage Park Dr. Humble, TX 77396  
 Roen@CrackedFox.com | 832.364.4012 | www.CrackedFox.com

**Bill To:**

Montrose Management District  
 Attn: Gretchen Larson  
 5020 Montrose Blvd., Suite 311

Date	Invoice No.	Terms
09/11/15	544	Net 30
Payments/Credits	Balance Due	
\$0.00	\$2,500.00	

Item	Description	Quantity	Rate	Amount
Discount	format: for distribution to printers, web developers, partners and staff.		-20.00	-20.00
			<b>Total</b>	<b>\$2,500.00</b>

*Thank you for your business*

Page 2



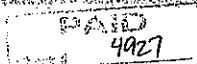
Cracked Fox  
 Montrose Management District  
 5020 Montrose Blvd  
 Suite 311  
 Houston, Texas, 77006

Cracked Fox  
 Montrose Management District  
 5020 Montrose Blvd  
 Suite 311  
 Houston, Texas, 77006

Description	Amount
Business Ambassador Monthly Contact Fee	\$2,800.00

Amount Due	\$0.00	Balance	\$0.00
Amount Due	\$2,800.00	Shipping Cost	\$0.00
		<b>Total</b>	<b>\$2,800.00</b>

0 - 30 days	31 - 60 days	61 - 90 days	> 90 days	Total
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00



*[Signature]*



Remit to:  
 DERO  
 504 Malcolm Ave SE Suite 308  
 MINNEAPOLIS, MN 55414

504 Malcolm Ave SE Suite 308, MINNEAPOLIS, MN 55414  
 Tax Registration No 25-303-0026  
 www.dero.com  
 (612) 339-0689 \* (888) 337-4729

Payment Net 30 days  
 Invoice date 05/15/2015  
 Due date 06/14/2015

**Invoice**

Page 1 of 1  
 Invoice number INV-00005102  
 Sales order SO-00005113  
 Customer PO Signed Quote  
 Reference Montrose District

Customer no 00007187  
 Stadler Kalligle - 713-489-4660

Site contact  
 Contact phone

Sold to:  
 Montrose Management District  
 5020 Montrose Suite 311  
 HOUSTON, TX 77005

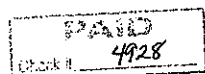
Ship to:  
 Stadler Kalligle  
 2300 Park Street #11  
 HOUSTON, TX 77019

Category No.	Description	Qty	Unit	Amount
DOWNTOWN-A	Surface Mount Powder Coated 2000124-8 - Orange RAL2004	3,000	EA	399.00
	Quantity: 3,000 Configuration: EPX Style: FT			
MONTROSE RACK	Surface Mount Powder Coated 2000124-8 - Orange RAL2004	2,000	EA	1,303.46
	Quantity: 2,000 Configuration: EPX Style: FT			
WEDGE-375-3,000	Wedge Anchor .375 x 3,000	20,000	EA	0.00

\* Please call 24 hours in advance.  
 \* LTR Gate  
 POK2577 w/ Locus 3/31  
 Mode of delivery: LTR  
 Tracking number: FedEx 343662172-0

Sales subtotal	Other charges	Freight	Net amount	Sales tax
1,702.46	-188.46	178.00	1,692.00	0.00

**INVOICE TOTAL DUE** USD \$1,692.00



**INVOICE**

ev1pro.com  
 e-Vision 1 Productions, LLC  
 2522 Palo Pinto Dr.  
 Houston, TX 77060  
 Phone 713-703-4811

Date: June 1/2015  
 Invoice # 38

To:  
 Gretchen Larson  
 Director of Economic Development  
 Montrose Management District  
 PO Box 22167  
 Houston 77227-2167  
 (713) 595.1215

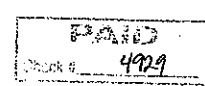
For: June Mixer  
 Photos-Video

DESCRIPTION	QTY	RATE	AMOUNT
Photo coverage MMD Mixer June 25	2.00	200.00	\$ 400.00
Video coverage MMD Mixer - June 25	2.00	200.00	400.00
Video editing MMD Mixer - June 25	10.00	70.00	700.00
Tax exemption			

SUBTOTAL	\$ 1,500.00
NO SALES TAX @ 8.25%	-
OTHER	
<b>TOTAL</b>	<b>\$ 1,500.00</b>

Make all checks payable to e-Vision 1 Productions, LLC

THANK YOU FOR YOUR BUSINESS!





# Equi-Tax Inc.

Suite 200  
17111 Rolling Creek Drive  
Houston Texas 77090  
281-444-4866

## Invoice

DATE	INVOICE #
7/1/2015	48277



### BILL TO

The Montrose District  
Hawes Hill Calderon LLP  
PO Box 22167  
Houston TX 77227-2167

DESCRIPTION	AMOUNT
Roll Management, Billing and Collections	1,652.70
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> <b>PAID</b>  Check # 4930 </div>	
<b>Total</b>	<b>\$1,652.70</b>

July 2, 2015

Invoice # MBRDG-18

Mr. Bill Calderon  
Executive Director  
Montrose Management District  
5020 Montrose, Suite 311  
Houston 77006  
713.724.4460  
bcalderon@montroosedistrict.org

Re: Montrose Management District Bridge Lighting Design

Lighting Design:  
Drawing and Specification Finalization \$2,030.00  
Subconsultant Invoices (see attached) \$2,609.54

Outstanding Invoices:  
N/A

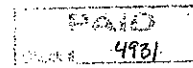
Reimbursable Expenses:  
N/A

**Total Amount Due: \$4,639.54**

Please remit to:

Gandy2 Lighting Design  
1824 Spring Street, #201  
Houston, TX 77007

Thank You!



## Greater East End Management District

Greater East End Management District  
P.O. Box 230099  
Houston, TX 77223-0099  
713-928-9916  
equiroz@greatereastend.com

## Invoice

Date	Invoice #
06/30/2015	9-83
Terms	Due Date
Net 30	07/31/2015



### BILL TO

Montrose (HCID#6)  
Bill Calderon, Executive Director  
HCID #6 (Montrose)  
P.O. Box 22161-2167  
Houston, TX 77227

Amount Due	Enclosed
\$5,760.00	

Please detach top portion and return with your payment.

Date	Service	Activity	Quantity	Rate	Amount
06/01/2015	Graffiti Abatement	Constituent visits, waiver collection, follow-up visits, graffiti identification, reporting, and graffiti abatement. Sites Abated: 39	8	80.00	640.00
06/04/2015	Graffiti Abatement	Constituent visits, waiver collection, follow-up visits, graffiti identification, reporting, and graffiti abatement. Sites Abated: 31	8	80.00	640.00
06/08/2015	Graffiti Abatement	Constituent visits, waiver collection, follow-up visits, graffiti identification, reporting, and graffiti abatement. Sites Abated: 30	8	80.00	640.00
06/11/2015	Graffiti Abatement	Constituent visits, waiver collection, follow-up visits, graffiti identification, reporting, and graffiti abatement. Sites Abated: 32	8	80.00	640.00
06/15/2015	Graffiti Abatement	Constituent visits, waiver collection, follow-up visits, graffiti identification, reporting, and graffiti abatement. Sites Abated: 19	8	80.00	640.00
06/18/2015	Graffiti Abatement	Constituent visits, waiver collection, follow-up visits, graffiti identification, reporting, and graffiti abatement. Sites Abated: 24	8	80.00	640.00
Continue to the next page					<div style="border: 1px solid black; padding: 5px; display: inline-block;"> <b>PAID</b>  Check # 4932 </div>

Page 2 of 2

Date	Service	Activity	Quantity	Rate	Amount
06/22/2015	Graffiti Abatement	Constituent visits, waiver collection, follow-up visits, graffiti identification, reporting, and graffiti abatement. Sites Abated: 29	8	80.00	640.00
06/25/2015	Graffiti Abatement	Constituent visits, waiver collection, follow-up visits, graffiti identification, reporting, and graffiti abatement. Sites Abated: 26	8	80.00	640.00
06/29/2015	Graffiti Abatement	Constituent visits, waiver collection, follow-up visits, graffiti identification, reporting, and graffiti abatement. Sites Abated: 22	8	80.00	640.00
<b>Total Sites Abated: 232</b>				<b>Total</b>	<b>\$5,760.00</b>

BARBARA J. SCHOTT  
HARRIS COUNTY AUDITOR  
1001 Preston, Suite 800  
Houston, Texas 77002  
(713) 755-1160



REMIT PAYMENT TO:  
Harris County Treasurer  
Orlando Sanchez  
1001 Preston, Room 652  
Houston, Texas 77002

# INVOICE

MONTROSE MANAGEMENT DISTRICT  
C/O EXECUTOR DIRECTOR  
PO BOX 22167  
HOUSTON, TX 77227-2167

Invoice / Statement No.: AH009590

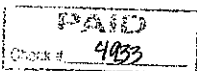
Customer No.: V00071086

Amount Due: 5,069.45

Amount Paid:

(Please detach and mail this top portion with payment)

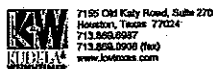
DATE	DESCRIPTION	AMOUNT
06/01/15	JUL'15:ASST CA FEB	5,069.45



The above amount is for County services. Amounts are due upon receipt of the invoice. If you have any questions, contact Accounts Receivable at 713-755-1160.

REMIT PAYMENT TO: HARRIS COUNTY TREASURER  
Orlando Sanchez  
1001 Preston, Room 652  
Houston, Texas 77002

County Auditor's Form #10  
Harris County, Texas (REV. 3/97)



7155 Old Katy Road, Suite 270  
Houston, Texas 77024  
713.868.8937  
713.868.8998 (fax)  
www.kwinc.com

Invoice #: 16202  
Invoice Date: 6/1/2015  
Billing Period: 5/1/2015 - 6/30/2015  
Project #: MON-651  
Project Name: Montrose District Exploratory Enhancements-Ph I

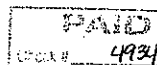
Bill Calderon  
Montrose District  
c/o Hawes Hill Calderon, LLP  
P.O. Box 22167  
Houston, TX 77227-2167

# INVOICE

Phase	Contract Amount	% Complete	Prior Billings	This Invoice
Schematic Design	\$10,800.00	50%	\$540.00	\$4,860.00
Construction Documentation	\$29,700.00	0%	\$0.00	\$0.00
Construction Administration	\$10,800.00	0%	\$0.00	\$0.00
Bidding	\$2,700.00	0%	\$0.00	\$0.00
	\$54,000.00		\$540.00	\$4,860.00

## REIMBURSABLE EXPENSES

Date	Vendor Name	Vendor Invoice #	Amount
4/20/2015	Mileage		\$7.59
5/13/2015	Meals/Food		\$22.58
5/13/2015	Mileage		\$0.40
5/14/2015	Meals/Food		\$17.73
5/14/2015	Meals/Food		\$3.74
5/18/2015	Mileage		\$7.59
5/18/2015	Architectural	KCI Technology	\$2,501.25
			\$2,569.95



Total Amount Due This Invoice: \$7,452.51

## PAYMENTS OUTSTANDING

Invoice #	Invoice Date	Fees	Expenses	Paid to Date	Balance Due
19079	5/14/2015	\$540.00	\$0.00	\$0.00	\$540.00
		\$540.00	\$0.00	\$0.00	

Total Past Due Amount: \$540.00

Total Current + Past Due Amount: \$7,992.51

Thank You!

LAWRENCE & ASSOCIATES  
2225A POTOMAC DR.  
HOUSTON, TEXAS 77057

July 1, 2015

Montrose Management District  
P.O. Box 22167  
Houston, TX 77227-2167

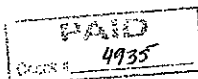
# INVOICE

Description	Amount
-------------	--------

## Professional fees:

Services performed as Contract Director of Economic Development for June, 2015. \$1,000.00

Total amount due \$1,000.00



Thank you,

Ray C. Lawrence



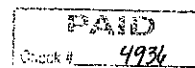
# INVOICE for email

Date	Invoice #
6/18/2015	15-6063

## Bill To:

Montrose District  
\*\*\*Email Invoice\*\*\*  
PO Box 22167  
Houston, TX 77066

P.O. Number	Customer Contact	Rep	Account #	Terms
	Gretchen Larson			Net 10 Days
Item Code	Quantity	Description	Amount	
BC-P	1000 each	Business Cards - Robinson	72.00	
Shipping	1 each	UPS Shipping	8.49	



Thank you for choosing Magoo's! EIN # 20-0544930

Magoo's PrintShop, Inc. • Certified WBE / HUB  
16637 West Hardy, Suite E • Houston, Texas 77060 • magoosprintshop.com  
281.875.6000 • Fax 281.875.6049 • Toll Free 888.890.0022 • Toll Free Fax 888.890.0022

Mr Drl of Texas (Houston)  
3669 Eastex Freeway  
Houston, TX 77026  
Phone (713)473-2700 Fax (713)473-2701

INVOICE# 55X00015  
INV DATE 05/31/15  
ACCOUNT# 229281  
DUE DATE UPON RECEIPT

MONTROSE MGMT DISTRICT  
P O BOX 22167  
HOUSTON, TX 77227

Please remit top portion with payment

AMOUNT YOU  
ARE PAYING  
Phone#

AMOUNT 7,104.00

SERVICE ADDRESS: MONTROSE  
MONTROSE (HOUSTON, TX)

DATE	LOCATION	DESCRIPTION	AMOUNT
05/07/15	55X00015	SWEEPING-FLAT SWEEP FLAT RATE 05/07/15	776.00
05/07/15	55X00015	MAIN LANES - TKT 00015306	1,776.00
05/07/15	55X00015	SWEEPING-FLAT SWEEP FLAT RATE 05/07/15	776.00
05/07/15	55X00015	MAIN LANES - TKT 00015326	1,776.00
05/21/15	55X00015	SWEEPING-FLAT SWEEP FLAT RATE 05/21/15	776.00
05/21/15	55X00015	MAIN LANES - TKT 00015401	1,776.00
05/21/15	55X00015	SWEEPING-FLAT SWEEP FLAT RATE 05/21/15	776.00
05/21/15	55X00015	MAIN LANES - TKT 0015406	1,776.00

PAID  
Check # 4937

Please include the invoice number on your check.  
There will be a \$50.00 charge on all returned checks.

PLEASE NOTE THAT YOUR ACCOUNT HAS A PAST DUE BALANCE

INVT	55X00015	CURRENT	30 DAY	60 DAY	90 DAY	DATE
ACCT#	229281	7,104.00	7,104.00			05/31/15

PLEASE PAY THIS AMOUNT 7,104.00



MUNICIPAL ACCOUNTS  
& CONSULTING, L.P.

## Invoice

Date	Invoice #
7/1/2015	38590

Montrose Management District  
1300 Post Oak Blvd, Suite 1600  
Houston, TX 77056

Description	Amount
Monthly Bookkeeping	1,125.00
Additional report preparation	300.00
Advance invoices to Directors	37.50
Concurred with IRS	75.00
Preparation for Additional Payroll	75.00
Monthly Payroll Taxes	18.75
Additional time for Board Meeting	37.50
Projects requested by Board of Directors	150.00
Delivery	23.20
Postage	27.00
Copies	80.75
Mileage	8.05
Delivery	17.98
Document Storage & Retention Service	9.50
Total Reasonable Expenses	164.57
<b>Total</b>	<b>\$1,985.32</b>

PAID  
Check # 4936

100 River Pointe • Suite 240 • Conroe, Texas 77304 • Phone: 936.756.1644 • Fax: 936.756.1844

8834 N. CAPITAL OF TEXAS HIGHWAY, SUITE 150 • AUSTIN, TEXAS 78759 • 512.782.2400 • Fax 512.795.9968

1300 Post Oak Blvd. • Suite 1600 • Houston, Texas 77056 • Phone: 713.623.4539 • Fax: 713.629.6859

PERDUE, BRANDON, FIELDER, COLLINS & MOTT LLP  
Attorneys at Law  
1235 North Loop West, Suite 600  
Houston, Texas 77008

INVOICE#	IVC00026269
INVOICE DATE	6/2/2015
INVOICE TO	1

Bill to:

Montrose Management District W (HCID 11)  
c/o Equi-Tax Inc.  
P.O. Box 73109  
Houston, Texas 77273

Professional Services rendered in the collection of delinquent taxes, penalties and interest May, 2015.	\$271.85
--	----------

PAID  
Check # 4939

## SENTRIFORCE

a view from above

## Invoice

Billing Address

Montrose Management District  
Bill Calderon  
P.O. Box 22167  
Houston, TX 77227-2167

Date	Invoice #	Terms	Rep	Due Date	
6/1/2015	17911	NET 15	LC	6/16/2015	
Item	Description	Qty	Rate	Service	Amount
RAYEN	RAYEN Video Recording System - 4 Cameras, optional Surveillance Lighting, Wireless Communication, SIDE AUTO-ALERT UNIT: MONTROSE	1	350.00	6/1/2015	350.00
Monthly Security Invoice					
Sales Tax (0.0%)					\$0.00
Total					\$350.00
Payments/Credits					\$0.00
Balance Due					\$350.00

Make checks payable to SantaForce	SantaForce 6611 Northwest Dr. Suite 100 Houston, TX 77024 713-742-6000
-----------------------------------	---

Make checks payable to Sentriforce  
Sentriforce  
6611 Postcrest Dr. Suite 100  
Houston, TX 77024  
713-742-6000

PAID  
Check # 4940

NETWORK OUTLETTERS INC. 10000  
10000 NORTH LOOP WEST SUITE 100  
HOUSTON, TX 77056

INVOICE #	DUE DATE	AMOUNT DUE
17911	June 16, 2015	\$350.00

ADDRESS SERVICE REQUESTED

AMOUNT ENCLOSED

MAKE CHECKS PAYABLE TO:

NETWORK OUTLETTERS INC.  
10000 NORTH LOOP WEST SUITE 100  
HOUSTON, TX 77056

Check box and see reverse for name or address correction

SEND TO: 10000 NORTH LOOP WEST SUITE 100  
HOUSTON, TX 77056

# SENTRIFORCE

a view from above

## Invoice

### Billing Address

Monroe Management District  
Bill Calderon  
P.O. Box 22167  
Houston, TX 77227-2167

Date	Invoice #	Terms	Rep	Due Date	
6/1/2015	17912	NET 15	LC	6/16/2015	
Item	Description	Qty	Rate	Service	Amount
RAVEN	RAVEN Video Recording System, 4 Camera, optional Strobe Lighting, Wireless Communication, SITE: BURNASIS UNIT: MONTROSE	1	350.00	6/1/2015	\$350.00
Monthly Security Invoice					
SentinForce 6615 Fortwest 31r. Suite 100 Houston, TX 77024 713-742-6900			Sales Tax (0.0%) \$0.00 Total \$350.00 Payments/Credits \$0.00 Balance Due \$350.00		

Make checks payable to Sentriforce

Sentriforce  
6611 Portwest Dr. Suite 100  
Houston, TX 77024  
713-742-6000

NETWORK OUTLETTERS, INC.  
8011 PORTWEST DR. SUITE 100  
HOUSTON, TX 77024

ADDRESS SERVICE REQUESTED

AMOUNT ENCLOSED

MAKE CHECKS PAYABLE TO:

NETWORK OUTLETTERS, INC.  
8011 PORTWEST DR. SUITE 100  
HOUSTON, TX 77024

Check box and use reverse for name or address correction

30641-0010/10710020000000

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# SENTRIFORCE

a view from above

## Invoice

### Billing Address

Monroe Management District  
Bill Calderon  
P.O. Box 22167  
Houston, TX 77227-2167

Date	Invoice #	Terms	Rep	Due Date	
6/1/2015	17913	NET 15	LC	6/16/2015	
Item	Description	Qty	Rate	Service	Amount
RAVEN	RAVEN Video Recording System, 4 Camera, optional Strobe Lighting, Wireless Communication, SITE: BURNASIS UNIT: MONTROSE	1	350.00	6/1/2015	\$350.00
Monthly Security Invoice					
Sales Tax (0.0%)				\$0.00	
Total				\$350.00	
Payments/Credits				\$0.00	
Balance Due				\$350.00	

Make checks payable to SecurixForce

SecurixForce  
6011 Northwest Dr, Suite 100  
Houston, TX 77024  
713-742-6100

Make checks payable to Sentriforce

Sentriforce  
6611 Portwest Dr. Suite 100  
Houston, TX 77024  
713-742-6000

NETWORK OUTLETTERS, INC.  
8011 PORTWEST DR. SUITE 100  
HOUSTON, TX 77024

ADDRESS SERVICE REQUESTED

AMOUNT ENCLOSED

MAKE CHECKS PAYABLE TO:

NETWORK OUTLETTERS, INC.  
8011 PORTWEST DR. SUITE 100  
HOUSTON, TX 77024

Check box and use reverse for name or address correction

30641-0010/10710020000000

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# SENTRIFORCE

a view from above

## Invoice

### Billing Address

Monroe Management District  
Bill Calderon  
P.O. Box 22167  
Houston, TX 77227-2167

Date	Invoice #	Items	Rep	Due Date	
6/1/2015	17914	NET 15	LC	6/16/2015	
Item	Description	Qty	Rate	Service	Amount
RAVEN	RAVEN Video Recording System, 4 Camera, optional Strobe Lighting, Wireless Communication, SITE: 7281524 UNIT: MONTROSE	1	350.00	6/1/2015	350.00
Monthly Security Invoice					
			Sales Tax (0.25%)		\$0.00
			Total		\$350.00
Make checks payable to SecurForce  SecurForce 6615 Rivercrest Dr. Suite 100 Houston, TX 77024 713-742-6660			Payments/Credits		\$0.00
			Balance Due		\$350.00

Make checks payable to Sentriforce

Sentriforce  
6611 Portwest Dr. Suite 100  
Houston, TX 77024  
713-742-6000

NETWORK OUTLETTERS, INC.  
8011 PORTWEST DR. SUITE 100  
HOUSTON, TX 77024

ADDRESS SERVICE REQUESTED

AMOUNT ENCLOSED

MAKE CHECKS PAYABLE TO:

NETWORK OUTLETTERS, INC.  
8011 PORTWEST DR. SUITE 100  
HOUSTON, TX 77024

Check box and use reverse for name or address correction

30641-0010/10710020000000

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# SENTRIFORCE

a view from above

## Invoice

### Billing Address

Monroe Management District  
Bill Calderon  
P.O. Box 22167  
Houston, TX 77227-2167

Date	Invoice #	Terms	Rep	Due Date	
6/1/2015	17915	NET 15	LC	6/16/2015	
Item	Description	Qty	Rate	Service	Amount
CONSOLE	Security Camera Video Console	1	150.00	6/1/2015	150.00
Monthly Security Invoice					
Sales Tax (0.0%)					\$0.00
Total					\$150.00
Payments/Credits					\$0.00
Balance Due					\$150.00

Make checks payable to SentriForce

SentriForce  
6603 Powers Dr. Suite 108  
Houston, TX 77024  
713-742-6000

Make checks payable to Sentriforce

Sentriforce  
6611 Portwest Dr. Suite 100  
Houston, TX 77024  
713-742-6000

NETWORK OUTLETTERS, INC.  
8011 PORTWEST DR. SUITE 100  
HOUSTON, TX 77024

ADDRESS SERVICE REQUESTED

AMOUNT ENCLOSED

MAKE CHECKS PAYABLE TO:

NETWORK OUTLETTERS, INC.  
8011 PORTWEST DR. SUITE 100  
HOUSTON, TX 77024

Check box and use reverse for name or address correction

30641-0010/10710020000000

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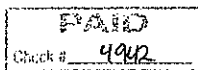
Towny Tidwell  
4333 Harby St  
Houston TX 77023

Montrose Management District  
Groshen Larson  
5020 Montrose Blvd. #300  
Houston TX 77006

Invoice # 0000040  
Invoice Date July 1, 2015  
Amount Due \$3,500.00 USD

Task	Time Entry Notes	Rate	Hours	Line Total
Website Updates	Curating the slider, getting Edit Flow set up	25.00	5	125.00
General	Social Media Posting, Monitoring, Scheduling, emails, instant messages, texts with the team, reading neighborhood news and newsletters	25.00	125	3,125.00
Meetings	Creative Team, Mixer, etc.	25.00	4	100.00
Writing	Editing articles for MMD website	25.00	8	200.00
	Discount	-25.00	2	-50.00
Total				3,500.00
Amount Paid				-0.00
Amount Due				\$3,500.00 USD

Terms:  
Please send payment within 21 days of receiving this invoice. A 1.5% interest charge will be added monthly to late invoices.



This invoice was sent using Pro6000

## PAYMENT STUB

Towny Tidwell  
4333 Harby St  
Houston TX 77023

To View Your Invoice Online  
Go to <https://townytidwell.freshbooks.com/code> and enter the code j8p7caC6dQYQZL

Client Montrose Management District  
Invoice # 0000040  
Invoice Date July 1, 2015  
Amount Due \$3,500.00 USD  
Amount Enclosed



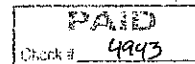
## Invoice

Date	Invoice #
6/2/2015	18073

<b>Bill To</b> Montrose Management District 5020 Montrose BLVD. Suite 311 Houston, TX 77006
---

<b>Ship To</b> Montrose Management District 5020 Montrose BLVD. Suite 311 Houston, TX 77006
---

P.O. Number	Terms	Rep	Ship	Project
			6/2/2015	
Quantity	Item Code	Description	Price Each	Amount
1	Prior	150 - MMD SUMMER MIXER POSTCARDS: 4 X 6, COLORS 44 CM 100% GLOSS COVER, CUT AND BOX	79.00	79.00
1	Bindery	Out-of-state sale, exempt from sales tax	0.00	0.00
			0.00%	0.00
			<b>Total</b>	\$79.00



United Graphics 3426 North Gemini, Houston, TX 77041 PH: 713.460.3260 FAX: 713.460.4210 [customerservice@unitedgraphics.org]

Hawes Hill Calderon LLP  
P.O. Box 22167  
Houston TX 77227-2167

Invoice

Bill To:

MD-Montrose Management District  
P.O. Box 22167  
Houston, TX 77227

Invoice #: 43015066  
Date: 7/7/2015

Page: 1

DATE	DESCRIPTION	AMOUNT
	Professional consulting, administration, project management, marketing & public relations, May 2015	\$18,752.23
	GIS/mapping, P. Horton, June 2015	\$75.00
	UCR data, April and May, 2015, 1/7th of shared costs at \$0.25 per month	\$0.50
	Verizon charges, G. Larson, 1/4th of shared costs	\$45.93
	In-house postage photocopies, binding, etc.	\$444.56
	Reimbursable mileage, parking, tolls and related expenses as follows:	
	Jerry Lowry, May 2015	
	Jerry Lowry, May 2015	\$68.23
	Jerry Lowry, June 1-11, 2015	\$81.76
	Gretchen Larson, June 2015	\$149.30
	Linda Clayton, June 2015	\$16.10
<div>PAID Check # 4925</div>		
		Sales Tax: \$0.00
		Total Amount: \$19,633.61
		Amount Applied: \$0.00
		Balance Due: \$19,633.61

Terms: C.O.D.

EXPENSE REPORT

Name Dennis Beedon		Period Ending June 2015		Service Area Montrose District		
Date	Destination	Purpose	Miles Driven	Other Expenses (2)	Amount	Bill to Dist. (Y/N)
1-Jun	Business Mileage	contact with Montrose Businesses	15			Y
2-Jun	Business Mileage	contact with Montrose Businesses	18			Y
3-Jun	Business Mileage	contact with Montrose Businesses	32			Y
4-Jun	Business Mileage	contact with Montrose Businesses	22			Y
8-Jun	Business Mileage	contact with Montrose Businesses	12			Y
9-Jun	Business Mileage	contact with Montrose Businesses	17			Y
10-Jun	Business Mileage	contact with Montrose Businesses	15			Y
11-Jun	Business Mileage	contact with Montrose Businesses	14			Y
12-Jun	Business Mileage	contact with Montrose Businesses	15			Y
15-Jun	Business Mileage	contact with Montrose Businesses	12			Y
18-Jun	Business Mileage	contact with Montrose Businesses	15			Y
20-Jun	Business Mileage	contact with Montrose Businesses	12			Y
22-Jun	Business Mileage	contact with Montrose Businesses	15			Y
23-Jun	Business Mileage	contact with Montrose Businesses	15			Y
24-Jun	Business Mileage	contact with Montrose Businesses	15			Y
25-Jun	Business Mileage	contact with Montrose Businesses	16	mixer supplies	\$ 13.29	Y
29-Jun	Business Mileage	contact with Montrose Businesses	12	monthly phone allowance	\$ 45.00	Y
30-Jun	Business Mileage	contact with Montrose Businesses	12			Y
						Y
						Y
						Y
			284		\$ 58.29	
				0.565		\$ 180.46
				Other Expenses (2)		
				Expenses billed to District (Y)		\$ 58.29
				Expenses not billed to District (N)		\$ -
				Amount Billed to District		\$ 218.75
				Total Reimbursement		\$ 218.75

\* Attach evidence of purchase

*[Signature]* 6/30/15

Approval Date



**MONTROSE MANAGEMENT DISTRICT  
CITY OF HOUSTON  
HARRIS COUNTY, TEXAS**

---

**AGENDA MEMORANDUM**

**TO:** Montrose Management District Board of Directors  
**FROM:** Executive Director  
**SUBJECT:** Agenda Item Materials

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8. Receive and Approve FY 2014 Financial Audit Report.

**MONTROSE MANAGEMENT DISTRICT**  
**HARRIS COUNTY, TEXAS**  
**ANNUAL FINANCIAL REPORT**  
**DECEMBER 31, 2014**

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## **INDEPENDENT AUDITOR'S REPORT**

Board of Directors  
Montrose Management District  
Harris County, Texas

We have audited the accompanying financial statements of the governmental activities and each major fund of Montrose Management District (the "District"), as of and for the year ended December 31, 2014, and the related notes to the financial statements, which collectively comprise the District's basic financial statements as listed in the table of contents.

### **Management's Responsibility for the Financial Statements**

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

### **Auditor's Responsibility**

Our responsibility is to express opinions on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

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

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

Board of Directors  
Montrose Management District

**Opinions**

In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities and each major fund of the District as of December 31, 2014, and the respective changes in financial position for the year then ended in conformity with accounting principles generally accepted in the United States of America.

**Other Matters**

*Required Supplementary Information*

Accounting principles generally accepted in the United States of America require that Management's Discussion and Analysis on pages 3 through 7 and the Schedules of Revenues, Expenditures and Changes in Fund Balance – Budget and Actual – Governmental Funds on pages 25 through 27 be presented to supplement the basic financial statements. Such 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. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

**Supplementary Information**

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the District's basic financial statements. The supplementary information required by the Texas Commission on Environmental Quality as published in the *Water District Financial Management Guide* is presented for purposes of additional analysis and is not a required part of the basic 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 basic financial statements. The supplementary information, excluding that portion marked "Unaudited" on which we express no opinion or provide any assurance, 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 information is fairly stated in all material respects in relation to the basic financial statements as a whole.

McCall Gibson Swedlund Barfoot PLLC  
Certified Public Accountants  
Houston, Texas

July 13, 2015

# **MONTROSE MANAGEMENT DISTRICT MANAGEMENT'S DISCUSSION AND ANALYSIS FOR THE YEAR ENDED DECEMBER 31, 2014**

Management's discussion and analysis of the Montrose Management District's (the "District") financial performance provides an overview of the District's financial activities for the fiscal year ended December 31, 2014. Please read it in conjunction with the District's financial statements, which begin on page 8.

## **USING THIS ANNUAL REPORT**

This annual report consists of a series of financial statements. The basic financial statements include: (1) combined fund financial statements and government-wide financial statements and (2) notes to the financial statements. The combined fund financial statements and government-wide financial statements combine both: (1) the Statement of Net Position and Governmental Funds Balance Sheet and (2) the Statement of Activities and Governmental Fund Revenues, Expenditures and Changes in Fund Balances. This report also includes other supplementary information in addition to the basic financial statements.

## **GOVERNMENT-WIDE FINANCIAL STATEMENTS**

The District's annual report includes two financial statements combining the government-wide financial statements and the fund financial statements. The government-wide portion of these statements provides both long-term and short-term information about the District's overall status. Financial reporting at this level uses a perspective similar to that found in the private sector with its basis in full accrual accounting and elimination or reclassification of internal activities.

The first of the government-wide statements is the Statement of Net Position. This information is found in the Statement of Net Position column on pages 8 and 9. The Statement of Net Position is the District-wide statement of its financial position presenting information that includes all of the District's assets and liabilities, with the difference reported as net position. Over time, increases or decreases in net position may serve as a useful indicator of whether the financial position of the District as a whole is improving or deteriorating. Evaluation of the overall health of the District would extend to other non-financial factors.

The government-wide portion of the Statement of Activities on pages 11 and 12 reports how the District's net position changed during the current year. All current year revenues and expenses are included regardless of when cash is received or paid.

## **FUND FINANCIAL STATEMENTS**

The combined statements also include fund financial statements. A fund is a grouping of related accounts that is used to maintain control over resources that have been segregated for specific activities or objectives. The District has two major governmental funds. The General Funds for the East Zone and West Zone account for resources not accounted for in another fund, assessment revenues, costs and general expenditures.

**MONTROSE MANAGEMENT DISTRICT  
MANAGEMENT'S DISCUSSION AND ANALYSIS  
FOR THE YEAR ENDED DECEMBER 31, 2014**

**FUND FINANCIAL STATEMENTS (Continued)**

Governmental funds are reported in each of the financial statements. The focus in the fund statements provides a distinctive view of the District's governmental funds. These statements report short-term fiscal accountability focusing on the use of spendable resources and balances of spendable resources available at the end of the year. They are useful in evaluating annual financing requirements of the District and the commitment of spendable resources for the near-term.

Since the government-wide focus includes the long-term view, comparisons between these two perspectives may provide insight into the long-term impact of short-term financing decisions. The adjustments columns, the Reconciliation of the Governmental Funds Balance Sheet to the Statement of Net Position on page 10 and the Reconciliation of the Governmental Funds Statement of Revenues, Expenditures and Changes in Fund Balances to the Statement of Activities on page 13 explain the differences between the two presentations and assist in understanding the differences between these two perspectives.

**NOTES TO THE FINANCIAL STATEMENTS**

The accompanying notes to the financial statements provide information essential to a full understanding of the government-wide and fund financial statements. The notes to the financial statements can be found on pages 14 through 23 in this report.

**OTHER INFORMATION**

In addition to the financial statements and accompanying notes, this report also presents certain required supplementary information ("RSI"). Budgetary comparison schedules are included as RSI for the Governmental Funds Total and East Zone and West Zone General Funds.

**MONTROSE MANAGEMENT DISTRICT  
MANAGEMENT'S DISCUSSION AND ANALYSIS  
FOR THE YEAR ENDED DECEMBER 31, 2014**

**GOVERNMENT-WIDE FINANCIAL ANALYSIS**

The District's assets exceeded liabilities and deferred inflows of resources by \$853,592 as of December 31, 2014. A portion of the District's net position reflects its net investment in capital assets (e.g., signage, a vehicle and related equipment), less any debt used to acquire those assets that is still outstanding. The District uses these assets to provide security services.

The following is a comparative analysis of government-wide changes in net position.

	Summary of Changes in the Statement of Net Position		
	2014	2013	Change Positive (Negative)
Current and Other Assets	\$ 2,929,004	\$ 2,452,706	\$ 476,298
Capital Assets (Net of Accumulated Depreciation)	<u>8,780</u>	<u>20,744</u>	<u>(11,964)</u>
Total Assets	<u>\$ 2,937,784</u>	<u>\$ 2,473,450</u>	<u>\$ 464,334</u>
Total Liabilities	<u>\$ 100,952</u>	<u>\$ 93,621</u>	<u>\$ (7,331)</u>
Deferred Inflows of Resources	<u>\$ 1,983,240</u>	<u>\$ 1,671,744</u>	<u>\$ (311,496)</u>
Net Position:			
Net Investment in Capital Assets	\$ 8,780	\$ 20,744	\$ (11,964)
Unrestricted	<u>844,812</u>	<u>687,341</u>	<u>157,471</u>
Total Net Position	<u>\$ 853,592</u>	<u>\$ 708,085</u>	<u>\$ 145,507</u>



**MONTROSE MANAGEMENT DISTRICT  
MANAGEMENT'S DISCUSSION AND ANALYSIS  
FOR THE YEAR ENDED DECEMBER 31, 2014**

**GOVERNMENT-WIDE FINANCIAL ANALYSIS (Continued)**

The following table provides a summary of the District's operations for the years ended December 31, 2014 and December 31, 2013. The District's net position increased by \$145,507

	Summary of Changes in the Statement of Activities		
	2014	2013	Change Positive (Negative)
Revenues:			
Property Assessments	\$ 1,631,269	\$ 1,400,863	\$ 230,406
Other Revenues	<u>66,163</u>	<u>48,495</u>	<u>17,668</u>
Total Revenues	\$ 1,697,432	\$ 1,449,358	\$ 248,074
Expenses for Services	<u>1,551,925</u>	<u>1,378,614</u>	<u>(173,311)</u>
Change in Net Position	\$ 145,507	\$ 70,744	\$ 74,763
Net Position, Beginning of Year	<u>708,085</u>	<u>637,341</u>	<u>70,744</u>
Net Position, End of Year	<u>\$ 853,592</u>	<u>\$ 708,085</u>	<u>\$ 145,507</u>

**FINANCIAL ANALYSIS OF THE DISTRICT'S GOVERNMENTAL FUNDS**

The General Fund balance for the East Zone decreased by \$3,518 due to current year expenditures exceeding assessment revenues. The General Fund balance for the West Zone increased by \$134,977 due to assessment revenues exceeding current year expenditures.

**GENERAL FUNDS BUDGETARY HIGHLIGHTS**

The Board of Directors did not amend the General Fund budgets during the current fiscal year. Governmental funds total revenues were \$8,166 more than budgeted and governmental funds total expenditures were \$435,587 less than budgeted. East Zone revenues were \$4,616 less than budgeted due to less assessment revenue collected than budgeted. East Zone expenditures were \$147,904 less than budgeted. West Zone revenues were \$12,782 more than budgeted due primarily to more collection fees than anticipated. West Zone expenditures were \$287,683 less than budgeted. See the budget to actual comparisons on pages 25 through 27.

**MONTROSE MANAGEMENT DISTRICT  
MANAGEMENT'S DISCUSSION AND ANALYSIS  
FOR THE YEAR ENDED DECEMBER 31, 2014**

**CAPITAL ASSETS**

The District's capital assets as of December 31, 2014, amount to \$8,780 (net of accumulated depreciation). These capital assets include one vehicle, related equipment and signage.

Capital Assets At Year-End, Net of Accumulated Depreciation

Capital Assets Subject to Depreciation:

Automobiles, Equipment and Signage                      \$ 8,780

Additional information on the District's capital assets can be found in Note 4 on page 21 of this report.

**LONG-TERM DEBT ACTIVITY**

The District does not have any long-term debt as of December 31, 2014.

**CONTACTING THE DISTRICT'S MANAGEMENT**

This financial report is designed to provide a general overview of the District's finances. Questions concerning any of the information provided in this report or requests for additional information should be addressed to Montrose Management District, c/o Hawes Hill Calderon LLP, P.O. Box 22167, Houston, TX, 77227-2167.

**MONTROSE MANAGEMENT DISTRICT  
STATEMENT OF NET POSITION AND  
GOVERNMENTAL FUNDS BALANCE SHEET  
DECEMBER 31, 2014**

	East Zone General Fund	West Zone General Fund	Governmental Funds Total
<b>ASSETS</b>			
Cash, Note 3	\$ 158,131	\$ 589,450	\$ 747,581
Investments, Note 3	250,000	150,000	400,000
Receivables:			
Assessments	555,197	1,208,056	1,763,253
Penalty and Interest	2,012	9,596	11,608
Accrued Interest	194	99	293
Prepaid Costs	2,007	4,262	6,269
Capital Assets (Net of Accumulated Depreciation), Note 4			
<b>TOTAL ASSETS</b>	<u>\$ 967,541</u>	<u>\$ 1,961,463</u>	<u>\$ 2,929,004</u>
<b>LIABILITIES</b>			
Accounts Payable	\$ 29,188	\$ 53,312	\$ 82,500
Payroll Liabilities	3,170	6,736	9,906
Due to Taxpayers	<u>6,235</u>	<u>2,311</u>	<u>8,546</u>
<b>TOTAL LIABILITIES</b>	<u>\$ 38,593</u>	<u>\$ 62,359</u>	<u>\$ 100,952</u>
<b>DEFERRED INFLOWS OF RESOURCES</b>			
Assessments	<u>\$ 624,150</u>	<u>\$ 1,412,079</u>	<u>\$ 2,036,229</u>
<b>FUND BALANCES</b>			
Nonspendable Prepaid Costs	\$ 2,007	\$ 4,262	\$ 6,269
Assigned to 2015 Budgeted Deficit, Note 2	128,723	93,235	221,958
Unassigned	<u>174,068</u>	<u>389,528</u>	<u>563,596</u>
<b>TOTAL FUND BALANCES</b>	<u>\$ 304,798</u>	<u>\$ 487,025</u>	<u>\$ 791,823</u>
<b>TOTAL LIABILITIES, DEFERRED INFLOWS OF RESOURCES AND FUND BALANCES</b>	<u>\$ 967,541</u>	<u>\$ 1,961,463</u>	<u>\$ 2,929,004</u>
<b>NET POSITION</b>			
Net Investment in Capital Assets			
Unrestricted			
<b>TOTAL NET POSITION</b>			

The accompanying notes to the financial  
statements are an integral part of this report.

Adjustments	Statement of Net Position
\$	\$ 747,581
	400,000
	1,763,253
	11,608
	293
	6,269
<u>8,780</u>	<u>8,780</u>
\$ <u>8,780</u>	\$ <u>2,937,784</u>
\$	\$ 82,500
	9,906
	<u>8,546</u>
\$	\$ <u>100,952</u>
\$ (52,989)	\$ <u>1,983,240</u>
\$ (6,269)	\$
(221,958)	
<u>(563,596)</u>	
\$ <u>(791,823)</u>	\$ <u>-0-</u>
\$ 8,780	\$ 8,780
<u>844,812</u>	<u>844,812</u>
\$ <u>853,592</u>	\$ <u>853,592</u>

The accompanying notes to the financial statements are an integral part of this report.

**MONTROSE MANAGEMENT DISTRICT  
RECONCILIATION OF THE GOVERNMENTAL FUNDS BALANCE SHEET  
TO THE STATEMENT OF NET POSITION  
DECEMBER 31, 2014**

Total Fund Balances - Governmental Funds	\$ 791,823
Amounts reported for governmental activities in the Statement of Net Position are different because:	
Capital assets used in governmental activities are not financial resources and therefore are not reported as assets in the governmental funds.	8,780
Deferred assessment and penalty and interest revenues for the 2013 and prior levies became part of recognized revenues in the governmental activities of the District.	<u>52,989</u>
Total Net Position - Governmental Activities	<u>\$ 853,592</u>

The accompanying notes to the financial  
statements are an integral part of this report.

**MONTROSE MANAGEMENT DISTRICT**  
**STATEMENT OF ACTIVITIES AND GOVERNMENTAL FUND REVENUES,**  
**EXPENDITURES AND CHANGES IN FUND BALANCES**  
**FOR THE YEAR ENDED DECEMBER 31, 2014**

	East Zone General Fund	West Zone General Fund
<b>REVENUES</b>		
Assessment Revenues	\$ 494,038	\$ 1,122,826
Penalty and Interest	9,886	12,593
Investment Revenues	1,456	1,846
Miscellaneous Revenues	<u>22,245</u>	<u>6,530</u>
<b>TOTAL REVENUES</b>	<u>\$ 527,625</u>	<u>\$ 1,143,795</u>
<b>EXPENDITURES/EXPENSES</b>		
Service Operations:		
Security and Public Safety	\$ 153,718	\$ 322,299
Mobility and Transportation	47,504	100,947
Visual Improvements and Cultural	44,551	55,067
Business Development	123,874	261,922
Administrative Expenditures	161,496	268,583
Depreciation		
<b>TOTAL EXPENDITURES/EXPENSES</b>	<u>\$ 531,143</u>	<u>\$ 1,008,818</u>
<b>NET CHANGE IN FUND BALANCES</b>	\$ (3,518)	\$ 134,977
<b>CHANGE IN NET POSITION</b>		
<b>FUND BALANCES/NET POSITION – JANUARY 1, 2014</b>	<u>308,316</u>	<u>352,048</u>
<b>FUND BALANCES/NET POSITION – DECEMBER 31, 2014</b>	<u>\$ 304,798</u>	<u>\$ 487,025</u>

The accompanying notes to the financial  
statements are an integral part of this report.

Governmental Funds Total	Adjustments	Statement of Activities
\$ 1,616,864	\$ 14,405	\$ 1,631,269
22,479	11,607	34,086
3,302		3,302
<u>28,775</u>		<u>28,775</u>
\$ <u>1,671,420</u>	\$ <u>26,012</u>	\$ <u>1,697,432</u>
\$ 476,017	\$ 8,431	\$ 484,448
148,451		148,451
99,618		99,618
385,796		385,796
430,079		430,079
	<u>3,533</u>	<u>3,533</u>
\$ <u>1,539,961</u>	\$ <u>11,964</u>	\$ <u>1,551,925</u>
\$ 131,459	\$ (131,459)	\$
	145,507	145,507
<u>660,364</u>	<u>47,721</u>	<u>708,085</u>
\$ <u>791,823</u>	\$ <u>61,769</u>	\$ <u>853,592</u>

The accompanying notes to the financial statements are an integral part of this report.

**MONTROSE MANAGEMENT DISTRICT  
RECONCILIATION OF THE GOVERNMENTAL FUNDS STATEMENT OF  
REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES  
TO THE STATEMENT OF ACTIVITIES  
FOR THE YEAR ENDED DECEMBER 31, 2014**

Net Change in Fund Balances - Governmental Funds	\$ 131,459
Amounts reported for governmental activities in the Statement of Activities are different because:	
Governmental funds report the proceeds from the sale of assets as miscellaneous revenue in the governmental funds of the District. The loss on the disposal of the asset is recorded as an expense in the Statement of Activities.	(8,431)
Governmental funds do not account for depreciation. However, in the Statement of Net Position, capital assets are depreciated and depreciation expense is recorded in the Statement of Activities.	(3,533)
Governmental funds report assessment and penalty and interest revenues when collected. However, in the Statement of Activities, revenue is recorded in the accounting period for which the assessments and penalty and interest are levied.	<u>26,012</u>
Change in Net Position - Governmental Activities	<u>\$ 145,507</u>

The accompanying notes to the financial  
statements are an integral part of this report.



**MONTROSE MANAGEMENT DISTRICT**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**DECEMBER 31, 2014**

**NOTE 1. CREATION OF DISTRICT**

The Harris County Improvement District No. 6, also known as the East Montrose Management District ("East Zone"), was created, effective June 17, 2005, by the Texas Legislature under provisions of House Bill No. 3518, of the 79<sup>th</sup> Legislature, Regular Session, 2005, codified as Chapter 3843, Texas Special District Local Laws Code (formerly Subchapter K, Chapter 376, Texas Local Government Code). The Harris County Improvement District No. 11, also known as the West Montrose Management District ("West Zone"), was created, effective June 19, 2009, by the Texas Legislature under provisions of House Bill 4722, of the 81<sup>st</sup> Legislature, Regular Session, 2009, codified as Chapter 3878, Texas Special District Local Laws Code (formerly Subchapter K, Chapter 376, Texas Local Government Code). Pursuant to the provisions of the Acts creating the Districts, the Districts are empowered to promote, develop, encourage, and maintain employment, commerce, transportation, housing, tourism, recreation, arts and entertainment, economic development, safety, and the public welfare in the Harris County Improvement District No. 6 and the Harris County Improvement District No. 11 (collectively the "Districts"). On February 15, 2011, the two Districts lawfully consolidated and became known as the Montrose Management District (the "District").

**NOTE 2. SIGNIFICANT ACCOUNTING POLICIES**

The accompanying financial statements have been prepared in accordance with accounting principles generally accepted in the United States of America as promulgated by the Governmental Accounting Standards Board ("GASB"). In addition, the accounting records of the District are maintained generally in accordance with the *Water District Financial Management Guide* published by the Texas Commission on Environmental Quality (the "Commission").

The District is a political subdivision of the State of Texas governed by an appointed board. GASB has established the criteria for determining whether or not an entity is a primary government or a component unit of a primary government. The primary criteria are that it has a separately appointed governing body, it is legally separate, and it is fiscally independent of other state and local governments. Under these criteria, the District is considered a primary government and is not a component unit of any other government. Additionally, no other entities meet the criteria for inclusion in the District's financial statement as component units.

**MONTROSE MANAGEMENT DISTRICT**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**DECEMBER 31, 2014**

**NOTE 2.      SIGNIFICANT ACCOUNTING POLICIES (Continued)**

Financial Statement Presentation

These financial statements have been prepared in accordance with GASB Codification of Governmental Accounting and Financial Reporting Standards Part II, Financial Reporting.

The GASB Codification set forth standards for external financial reporting for all state and local government entities, which include a requirement for a Statement of Net Position and a Statement of Activities. It requires the classification of net positions into three components: Net Investment in Capital Assets; Restricted; and Unrestricted. These classifications are defined as follows:

- Net Investment in Capital Assets – This component of net position consists of capital assets, including restricted capital assets, net of accumulated depreciation and reduced by the outstanding balances of any bonds, mortgages, notes, or other borrowings that are attributable to the acquisition, construction, or improvements of those assets.
- Restricted Net Position – This component of net position consists of external constraints placed on the use of assets imposed by creditors (such as through debt covenants), grantors, contributors, or laws or regulation of other governments or constraints imposed by law through constitutional provisions or enabling legislation.
- Unrestricted Net Position – This component of net position consists of assets that do not meet the definition of Restricted or Net Investment in Capital Assets.

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

Government-Wide Financial Statements

The Statement of Net Position and the Statement of Activities display information about the District as a whole. The District's Statement of Net Position and Statement of Activities are combined with the governmental fund financial statements. The District is viewed as a special-purpose government and has the option of combining these financial statements.

The Statement of Net Position is reported by adjusting the governmental fund types to report on the full accrual basis, economic resource basis, which recognizes all long-term assets and receivables as well as long-term debt and obligations. Any amounts recorded due to and due from other funds are eliminated in the Statement of Net Position.

**MONTROSE MANAGEMENT DISTRICT**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**DECEMBER 31, 2014**

**NOTE 2.      SIGNIFICANT ACCOUNTING POLICIES (Continued)**

Government-Wide Financial Statements (Continued)

The Statement of Activities is reported by adjusting the governmental fund types to report only items related to current year revenues and expenditures. Items such as capital outlay are allocated over their estimated useful lives as depreciation expense. Internal activities between governmental funds, if any, are eliminated by adjustment to obtain net total revenue and expense of the government-wide Statement of Activities.

Fund Financial Statements

As discussed above, the District's fund financial statements are combined with the government-wide statements. The fund statements include a Balance Sheet and Statement of Revenues, Expenditures and Changes in Fund Balances.

Governmental Funds

The District has two major governmental funds.

General Funds - For the East Zone and West Zone to account for resources not required to be accounted for in another fund, assessment revenues, costs and general expenditures.

Basis of Accounting

The District uses the modified accrual basis of accounting for governmental fund types. The modified accrual basis of accounting recognizes revenues when both "measurable and available." Measurable means the amount can be determined. Available means collectible within the current period or soon enough thereafter to pay current liabilities. The District considers revenue reported in governmental funds to be available if they are collectible within 60 days after year end. Also, under the modified accrual basis of accounting, expenditures are recorded when the related fund liability is incurred, except for principal and interest on long-term debt, which are recognized as expenditures when payment is due.

Annual assessments considered available by the District and included in revenue include the 2013 assessments collected during the period October 1, 2013 to December 31, 2014. In addition, assessments collected from January 1, 2014, to December 31, 2014, for the 2012 and prior assessment levies are included in revenues. The 2014 annual assessments for the District have been fully deferred to meet the operating expenditures for the 2015 fiscal year.

**MONTROSE MANAGEMENT DISTRICT**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**DECEMBER 31, 2014**

**NOTE 2.      SIGNIFICANT ACCOUNTING POLICIES (Continued)**

Basis of Accounting (Continued)

Amounts transferred between the funds are reported as other financing sources or uses. Loans between the funds are reported as interfund receivables and payables in the Governmental Funds Balance Sheet if there is intent to repay the amount and if the debtor fund has the ability to repay the advance on a timely basis.

Capital Assets

Capital assets, which include office equipment and fixtures and vehicles, are reported in the government-wide Statement of Net Position. All capital assets are valued at historical cost or estimated historical cost if actual historical cost is not available. Donated assets are valued at their fair market value on the date donated. Repairs and maintenance are recorded as expenditures in the governmental fund incurred and as an expense in the government-wide Statement of Activities. Capital asset additions, improvements and preservation costs that extend the life of an asset are capitalized and depreciated over the estimated useful life of the asset. Interest costs, including developer interest, engineering fees and certain other costs are capitalized as part of the asset.

Assets are capitalized, including infrastructure assets, if they have an original cost greater than \$5,000 and a useful life over two years. Depreciation is calculated on each class of depreciable property using the straight-line method of depreciation. Estimated useful lives are as follows:

	<u>Years</u>
Automobiles, Equipment and Signage	3-5

Budgeting

In compliance with governmental accounting principles, the Board of Directors annually adopts an unappropriated budget for the General Fund of the East Zone and the West Zone. The budgets were not amended during the current fiscal year.

Pensions

The District has not established a pension plan as the District does not have employees. The Internal Revenue Service has determined that fees of office received by Directors are considered to be wages subject to federal income tax withholding for payroll tax purposes only.

**MONTROSE MANAGEMENT DISTRICT**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**DECEMBER 31, 2014**

**NOTE 2.      SIGNIFICANT ACCOUNTING POLICIES (Continued)**

Measurement Focus

Measurement focus is a term used to describe which transactions are recognized within the various financial statements. In the government-wide Statement of Net Position and Statement of Activities, the governmental activities are presented using the economic resources measurement focus. The accounting objectives of this measurement focus are the determination of operating income, changes in net position, financial position, and cash flows. All assets and liabilities associated with the activities are reported. Fund equity is classified as net position.

Governmental fund types are accounted for on a spending or financial flow measurement focus. Accordingly, only current assets and current liabilities are included on the Balance Sheet, and the reported fund balances provide an indication of available spendable or appropriable resources. Operating statements of governmental fund types report increases and decreases in available spendable resources. The District's fund balances are classified using the following hierarchy:

*Nonspendable:* amounts that cannot be spent either because they are in nonspendable form or because they are legally or contractually required to be maintained intact.

*Restricted:* amounts that can be spent only for specific purposes because of constitutional provisions, or enabling legislation, or because of constraints that are imposed externally.

*Committed:* amounts that can be spent only for purposes determined by a formal action of the Board of Directors. The Board is the highest level of decision-making authority for the District. This action must be made no later than the end of the fiscal year. Commitments may be established, modified, or rescinded only through ordinances or resolutions approved by the Board. The District does not have any committed fund balances.

*Assigned:* amounts that do not meet the criteria to be classified as restricted or committed, but that are intended to be used for specific purposes. The District has not adopted a formal policy regarding the assignment of fund balances. As the December 31, 2014, the District has assigned \$128,723 and \$93,235, respectively, of the East Zone and West Zone fund balances to cover the projected 2015 deficits.

*Unassigned:* all other spendable amounts in the General Fund.

When expenditures are incurred for which restricted, committed, assigned or unassigned fund balances are available, the District considers amounts to have been spent first out of restricted funds, then committed funds, then assigned funds, and finally unassigned funds.

**MONTROSE MANAGEMENT DISTRICT**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**DECEMBER 31, 2014**

**NOTE 2. SIGNIFICANT ACCOUNTING POLICIES (Continued)**

Accounting Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amount of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenditures during the reporting period. Actual results could differ from those estimates.

**NOTE 3. DEPOSITS AND INVESTMENTS**

Deposits

Custodial credit risk is the risk that, in the event of the failure of a depository financial institution, a government will not be able to recover deposits or will not be able to recover collateral securities that are in the possession of an outside party. The District's deposit policy for custodial credit risk requires compliance with the provisions of Texas statutes.

Texas statutes require that any cash balance in any fund shall, to the extent not insured by the Federal Deposit Insurance Corporation or its successor, be continuously secured by a valid pledge to the Authority of securities eligible under the laws of Texas to secure the funds of the District, having an aggregate market value, including accrued interest, at all times equal to the uninsured cash balance in the fund to which such securities are pledged. At fiscal year end, the carrying amount of the District's deposits was \$1,147,581 and the bank balance was \$1,194,329. Of the bank balance, \$674,115 was covered by federal depository insurance and the balance was covered by collateral pledged in the name of the District and held in a third party depository.

The carrying values of the deposits are included in the Governmental Funds Balance Sheets and the Statement of Net Position at December 31, 2014, as listed below:

	<u>CASH</u>	<u>CERTIFICATES OF DEPOSIT</u>	<u>TOTAL</u>
EAST ZONE GENERAL FUND	\$ 158,131	\$ 250,000	\$ 408,131
WEST ZONE GENERAL FUND	<u>589,450</u>	<u>150,000</u>	<u>739,450</u>
TOTAL DEPOSITS	<u>\$ 747,581</u>	<u>\$ 400,000</u>	<u>\$ 1,147,581</u>

**MONTROSE MANAGEMENT DISTRICT**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**DECEMBER 31, 2014**

**NOTE 3. DEPOSITS AND INVESTMENTS (Continued)**

Investments

Under Texas law, the District is required to invest its funds under written investment policies that primarily emphasize safety of principal and liquidity and that address investment diversification, yield, maturity, and the quality and capability of investment management, and all District funds must be invested in accordance with the following investment objectives: understanding the suitability of the investment to the District's financial requirements, first; preservation and safety of principal, second; liquidity, third; marketability of the investments if the need arises to liquidate the investment before maturity, fourth; diversification of the investment portfolio, fifth; and yield, sixth. The District's investments must be made "with judgment and care, under prevailing circumstances, that a person of prudence, discretion, and intelligence would exercise in the management of the person's own affairs, not for speculation, but for investment, considering the probable safety of capital and the probable income to be derived." No person may invest District funds without express written authority from the Board of Directors.

Texas statutes include specifications for and limitations applicable to the District and its authority to purchase investments as defined in the Public Funds Investment Act. Authorized investments are summarized as follows: (1) obligations of the United States or its agencies and instrumentalities, (2) direct obligations of the State of Texas or its agencies and instrumentalities, (3) certain collateralized mortgage obligations, (4) other obligations, the principal of and interest on which are unconditionally guaranteed or insured by the State of Texas or the United States or its agencies and instrumentalities, including obligations that are fully guaranteed or insured by the Federal Deposit Insurance Corporation or by the explicit full faith and credit of the United States, (5) certain A rated or higher obligations of states, agencies, counties, cities, and other political subdivisions of any state, (6) bonds issued, assumed or guaranteed by the State of Israel, (7) insured or collateralized certificates of deposit, (8) certain fully collateralized repurchase agreements secured by delivery, (9) certain bankers' acceptances with limitations, (10) commercial paper rated A-1 or P-1 or higher and a maturity of 270 days or less, (11) no-load money market mutual funds and no-load mutual funds with limitations, (12) certain guaranteed investment contracts, (13) certain qualified governmental investment pools and (14) a qualified securities lending program.

**MONTROSE MANAGEMENT DISTRICT**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**DECEMBER 31, 2014**

**NOTE 3. DEPOSITS AND INVESTMENTS (Continued)**

Investments (Continued)

As of December 31, 2014, the District had the following investments and maturities:

Fund and Investment Type	Fair Value	Maturities in Years			
		Less Than 1	1-5	6-10	More Than 10
<u>EAST ZONE GENERAL</u>					
<u>FUND -</u>					
Certificates of Deposit	\$ 250,000	\$ 250,000	\$	\$	\$
<u>WEST ZONE GENERAL</u>					
<u>FUND -</u>					
Certificates of Deposit	150,000	150,000			
Total Investments	<u>\$ 400,000</u>	<u>\$ 400,000</u>	<u>\$ -0-</u>	<u>\$ -0-</u>	<u>\$ -0-</u>

**NOTE 4. CAPITAL ASSETS**

Capital assets activity for the year ended December 31, 2014:

	January 1, 2014	Additions/Deductions	December 31, 2014
<b>Capital Assets Subject to Depreciation</b>			
Automobiles, Equipment and Signage	\$ 60,091	\$ (21,004)	\$ 39,087
<b>Less Accumulated Depreciation</b>			
Automobiles, Equipment and Signage	\$ 39,347	\$ (9,040)	\$ 30,307
<b>Total Capital Assets, Net of Accumulated Depreciation</b>	\$ 20,744	\$ (11,964)	\$ 8,780

During the current fiscal year, the District sold its 2011 Ford Escape.

**NOTE 5. ANNUAL ASSESSMENTS**

In accordance with the Acts creating the Districts, the Districts may levy ad valorem taxes or assessment fees in accordance with Chapter 375, Local Government Code, to provide improvements and services for a project or activity the Districts are authorized to acquire, construct, improve, or provide under this Act.



**MONTROSE MANAGEMENT DISTRICT**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**DECEMBER 31, 2014**

**NOTE 5. ANNUAL ASSESSMENTS (Continued)**

On April 16, 2008, an order was adopted granting a petition for a service plan and an assessment roll for the East Zone. The order authorized levying an annual assessment which would assure sufficient funding for the services provided under the ten year (2008-2017) term of the Service Plan. The order authorized an assessment of \$0.125 per \$100 valuation on land and improvements within the East Zone throughout the term of the Service Plan.

During the year ended December 31, 2014, the East Zone levied an assessment of \$0.125 per \$100 of assessed valuation of taxable real property, which resulted in an assessment of \$614,788 for the 2014 assessment year. Total revenue of \$494,038 has been recorded in the current year.

On January 10, 2011, an order was adopted granting a petition for a service plan and an assessment roll for the West Zone. The order authorized levying an annual assessment which would assure sufficient funding for the services provided under the nine year (2009-2017) term of the Service Plan. The order authorized an assessment of \$0.125 per \$100 valuation on land and improvements within the West Zone throughout the term of the Service Plan.

During the year ended December 31, 2014, the West Zone levied an assessment of \$0.125 per \$100 of assessed valuation of taxable real property, which resulted in an assessment of \$1,368,452 for the 2014 assessment year. Total revenue of \$1,122,826 has been recorded in the current year.

The District's calendar for collection of the assessments is as follows:

- Levy Date - October 1 or as soon thereafter as practicable
- Lien Date - January 1.
- Due Date - Not later than January 31.
- Delinquent Date - February 1, at which time the taxpayer is liable for penalty and interest.

**NOTE 6. 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. The District participates in the Texas Municipal League Intergovernmental Risk Pool (TML) to provide general liability, automobile, errors and omissions, law enforcement and real and personal property coverage. The District, along with other participating entities, contributes annual amounts determined by TML's

**MONTROSE MANAGEMENT DISTRICT**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**DECEMBER 31, 2014**

**NOTE 6.      RISK MANAGEMENT (Continued)**

management. As claims arise they are submitted and paid by TML. There have been no significant reductions in coverage from the prior year and settlements have not exceeded coverage in the past three years.

**MONTROSE MANAGEMENT DISTRICT**

**REQUIRED SUPPLEMENTARY INFORMATION**

**DECEMBER 31, 2014**

**MONTROSE MANAGEMENT DISTRICT**  
**SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES**  
**IN FUND BALANCE - BUDGET AND ACTUAL – GOVERNMENTAL FUNDS TOTAL**  
**FOR THE YEAR ENDED DECEMBER 31, 2014**

	Original and Final Budget	Actual	Variance Positive (Negative)
<b>REVENUES</b>			
Assessment Revenues	\$ 1,637,554	\$ 1,616,864	\$ (20,690)
Penalty and Interest	25,000	22,479	(2,521)
Investment Revenues	700	3,302	2,602
Miscellaneous Revenues		28,775	28,775
<b>TOTAL REVENUES</b>	<u>\$ 1,663,254</u>	<u>\$ 1,671,420</u>	<u>\$ 8,166</u>
<b>EXPENDITURES</b>			
Service Operations:			
Security and Public Safety	\$ 543,000	\$ 476,017	\$ 66,983
Mobility and Transportation	290,000	148,451	141,549
Visual Improvements and Cultural	404,320	99,618	304,702
Business Development	391,645	385,796	5,849
Administrative Expenditures	346,583	430,079	(83,496)
<b>TOTAL EXPENDITURES</b>	<u>\$ 1,975,548</u>	<u>\$ 1,539,961</u>	<u>\$ 435,587</u>
<b>NET CHANGE IN FUND BALANCE</b>	\$ (312,294)	\$ 131,459	\$ 443,753
<b>FUND BALANCE – JANUARY 1, 2014</b>	<u>660,364</u>	<u>660,364</u>	
<b>FUND BALANCE – DECEMBER 31, 2014</b>	<u>\$ 348,070</u>	<u>\$ 791,823</u>	<u>\$ 443,753</u>

See accompanying independent auditor's report.

**MONTROSE MANAGEMENT DISTRICT  
SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES  
IN FUND BALANCE - BUDGET AND ACTUAL – EAST ZONE  
FOR THE YEAR ENDED DECEMBER 31, 2014**

	Original and Final Budget	Actual	Variance Positive (Negative)
<b>REVENUES</b>			
Assessment Revenues	\$ 524,017	\$ 494,038	\$ (29,979)
Penalty and Interest	8,000	9,886	1,886
Investment Revenues	224	1,456	1,232
Miscellaneous Revenues	<u>          </u>	<u>22,245</u>	<u>22,245</u>
<b>TOTAL REVENUES</b>	<u>\$ 532,241</u>	<u>\$ 527,625</u>	<u>\$ (4,616)</u>
<b>EXPENDITURES</b>			
Service Operations:			
Security and Public Safety	\$ 174,120	\$ 153,718	\$ 20,402
Mobility and Transportation	92,800	47,504	45,296
Visual Improvements and Cultural	149,782	44,551	105,231
Business Development	125,326	123,874	1,452
Administrative Expenditures	<u>137,019</u>	<u>161,496</u>	<u>(24,477)</u>
<b>TOTAL EXPENDITURES</b>	<u>\$ 679,047</u>	<u>\$ 531,143</u>	<u>\$ 147,904</u>
<b>NET CHANGE IN FUND BALANCE</b>	\$ (146,806)	\$ (3,518)	\$ 143,288
<b>FUND BALANCE – JANUARY 1, 2014</b>	<u>308,316</u>	<u>308,316</u>	<u>          </u>
<b>FUND BALANCE – DECEMBER 31, 2014</b>	<u>\$ 161,510</u>	<u>\$ 304,798</u>	<u>\$ 143,288</u>

See accompanying independent auditor's report.

**MONTROSE MANAGEMENT DISTRICT  
SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES  
IN FUND BALANCE - BUDGET AND ACTUAL – WEST ZONE  
FOR THE YEAR ENDED DECEMBER 31, 2014**

	Original and Final Budget	Actual	Variance Positive (Negative)
<b>REVENUES</b>			
Assessment Revenues	\$ 1,113,537	\$ 1,122,826	\$ 9,289
Penalty and Interest	17,000	12,593	(4,407)
Investment Revenues	476	1,846	1,370
Miscellaneous Revenues		6,530	6,530
<b>TOTAL REVENUES</b>	<u>\$ 1,131,013</u>	<u>\$ 1,143,795</u>	<u>\$ 12,782</u>
<b>EXPENDITURES</b>			
Service Operations:			
Security and Public Safety	\$ 368,880	\$ 322,299	\$ 46,581
Mobility and Transportation	197,200	100,947	96,253
Visual Improvements and Cultural	254,538	55,067	199,471
Business Development	266,319	261,922	4,397
Administrative Expenditures	209,564	268,583	(59,019)
<b>TOTAL EXPENDITURES</b>	<u>\$ 1,296,501</u>	<u>\$ 1,008,818</u>	<u>\$ 287,683</u>
<b>NET CHANGE IN FUND BALANCE</b>	\$ (165,488)	\$ 134,977	\$ 300,465
<b>FUND BALANCE – JANUARY 1, 2014</b>	<u>352,048</u>	<u>352,048</u>	
<b>FUND BALANCE – DECEMBER 31, 2014</b>	<u>\$ 186,560</u>	<u>\$ 487,025</u>	<u>\$ 300,465</u>

See accompanying independent auditor's report.

**MONTROSE MANAGEMENT DISTRICT**  
**SUPPLEMENTARY INFORMATION – REQUIRED BY THE**  
**WATER DISTRICT FINANCIAL MANAGEMENT GUIDE**  
**DECEMBER 31, 2014**

**MONTROSE MANAGEMENT DISTRICT**  
**GENERAL FUND EXPENDITURES – GOVERNMENTAL FUNDS TOTAL**  
**FOR THE YEAR ENDED DECEMBER 31, 2014**

**PURCHASED SERVICES FOR RESALE:**

Security and Public Safety	\$ 476,017
Mobility and Transportation	148,451
Visual Improvements and Cultural	99,618
Business Development	385,796
Administrative Expenditures	<u>430,079</u>

<b>TOTAL EXPENDITURES</b>	<b><u>\$ 1,539,961</u></b>
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See accompanying independent auditor's report.



**MONTROSE MANAGEMENT DISTRICT**  
**GENERAL FUND EXPENDITURES – EAST ZONE**  
**FOR THE YEAR ENDED DECEMBER 31, 2014**

**PURCHASED SERVICES FOR RESALE:**

Security and Public Safety	\$ 153,718
Mobility and Transportation	47,504
Visual Improvements and Cultural	44,551
Business Development	123,874
Administrative Expenditures	<u>161,496</u>

<b>TOTAL EXPENDITURES</b>	<b><u>\$ 531,143</u></b>
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See accompanying independent auditor's report.

**MONTROSE MANAGEMENT DISTRICT**  
**GENERAL FUND EXPENDITURES – WEST ZONE**  
**FOR THE YEAR ENDED DECEMBER 31, 2014**

**PURCHASED SERVICES FOR RESALE:**

Security and Public Safety	\$ 322,299
Mobility and Transportation	100,947
Visual Improvements and Cultural	55,067
Business Development	261,922
Administrative Expenditures	<u>268,583</u>

<b>TOTAL EXPENDITURES</b>	<b><u>\$ 1,008,818</u></b>
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See accompanying independent auditor's report.

**MONTROSE MANAGEMENT DISTRICT**  
**INVESTMENTS**  
**DECEMBER 31, 2014**

<u>Funds</u>	<u>Identification or Certificate Number</u>	<u>Interest Rate</u>	<u>Maturity Date</u>	<u>Balance at End of Year</u>	<u>Accrued Interest Receivable at End of Year</u>
<u>EAST ZONE</u>					
Certificate of Deposit	xxxxxxxx43	.30%	01/05/2015	\$ 50,000	\$ 71
Certificate of Deposit	xxxxxxxx69	.35%	07/06/2015	50,000	11
Certificate of Deposit	xxxxxxxx11	.30%	02/02/2015	50,000	60
Certificate of Deposit	xxxxxxxx31	.24%	06/06/2015	50,000	17
Certificate of Deposit	xxxxxxxx89	.30%	04/05/2015	<u>50,000</u>	<u>35</u>
TOTAL EAST ZONE				<u>\$ 250,000</u>	<u>\$ 194</u>
<u>WEST ZONE</u>					
Certificate of Deposit	xxxxxxxx10	.30%	03/16/2015	\$ 50,000	\$ 44
Certificate of Deposit	xxxxxxxx35	.24%	04/30/2015	50,000	20
Certificate of Deposit	xxxxxxxx97	.30%	04/05/2015	<u>50,000</u>	<u>35</u>
TOTAL WEST ZONE				<u>\$ 150,000</u>	<u>\$ 99</u>
GRAND TOTAL				<u>\$ 400,000</u>	<u>\$ 293</u>

See accompanying independent auditor's report.

**MONTROSE MANAGEMENT DISTRICT**  
**CHANGE IN ASSESSMENTS RECEIVABLE – GOVERNMENTAL FUNDS TOTAL**  
**FOR THE YEAR ENDED DECEMBER 31, 2014**

	<u>Assessments</u>	
ASSESSMENTS RECEIVABLE –		
JANUARY 1, 2014	\$ 1,585,176	
Adjustments to Beginning Balance	<u>(40,476)</u>	\$ 1,544,700
Original 2014 Assessments Roll	\$ 1,983,240	
Adjustment to 2014 Assessments Roll	<u>                    </u>	<u>1,983,240</u>
TOTAL TO BE ACCOUNTED FOR		\$ 3,527,940
ASSESSMENT COLLECTIONS:		
Prior Year	\$ 1,503,318	
Current Year	<u>261,369</u>	<u>1,764,687</u>
ASSESSMENTS RECEIVABLE – DECEMBER 31, 2014		<u>\$ 1,763,253</u>
ASSESSMENTS RECEIVABLE BY YEAR:		
2014		\$ 1,721,871
2013		29,893
2012		7,107
2011		2,975
2010		1,326
2009		38
2008		25
2007		<u>18</u>
		<u>\$ 1,763,253</u>

See accompanying independent auditor's report.

**MONTROSE MANAGEMENT DISTRICT**  
**CHANGE IN ASSESSMENTS RECEIVABLE – EAST ZONE**  
**FOR THE YEAR ENDED DECEMBER 31, 2014**

	<u>Assessments</u>	
ASSESSMENTS RECEIVABLE –		
JANUARY 1, 2014	\$ 466,747	
Adjustments to Beginning Balance	<u>(14,228)</u>	\$ 452,519
Original 2014 Assessments Roll	\$ 614,788	
Adjustment to 2014 Assessments Roll	<u>                    </u>	<u>614,788</u>
TOTAL TO BE ACCOUNTED FOR		\$ 1,067,307
ASSESSMENT COLLECTIONS:		
Prior Year	\$ 445,168	
Current Year	<u>66,942</u>	<u>512,110</u>
ASSESSMENTS RECEIVABLE – DECEMBER 31, 2014		<u>\$ 555,197</u>
ASSESSMENTS RECEIVABLE BY YEAR:		
2014		\$ 547,846
2013		5,432
2012		1,422
2011		378
2010		38
2009		38
2008		25
2007		<u>18</u>
		<u>\$ 555,197</u>

See accompanying independent auditor's report.

**MONTROSE MANAGEMENT DISTRICT**  
**CHANGE IN ASSESSMENTS RECEIVABLE – WEST ZONE**  
**FOR THE YEAR ENDED DECEMBER 31, 2014**

	<u>Assessments</u>	
ASSESSMENTS RECEIVABLE –		
JANUARY 1, 2014	\$ 1,118,429	
Adjustments to Beginning Balance	<u>(26,248)</u>	\$ 1,092,181
Original 2014 Assessments Roll	\$ 1,368,452	
Adjustment to 2014 Assessments Roll	<u>                    </u>	<u>1,368,452</u>
TOTAL TO BE ACCOUNTED FOR		\$ 2,460,633
ASSESSMENT COLLECTIONS:		
Prior Year	\$ 1,058,150	
Current Year	<u>194,427</u>	<u>1,252,577</u>
ASSESSMENTS RECEIVABLE – DECEMBER 31, 2014		<u>\$ 1,208,056</u>
ASSESSMENTS RECEIVABLE BY YEAR:		
2014		\$ 1,174,025
2013		24,461
2012		5,685
2011		2,597
2010		<u>1,288</u>
		<u>\$ 1,208,056</u>

See accompanying independent auditor's report.

**MONTROSE MANAGEMENT DISTRICT**  
**COMPARATIVE SCHEDULE OF REVENUES AND EXPENDITURES**  
**GOVERNMENTAL FUNDS TOTAL – FIVE YEARS**

	<u>Amounts</u>		
	<u>2014</u>	<u>2013</u>	<u>2012</u>
<b>REVENUES</b>			
Assessment Revenues	\$ 1,616,864	\$ 1,406,939	\$ 1,299,077
Penalty and Interest	22,479	23,846	20,122
Investment Revenues	3,302	3,216	3,108
Miscellaneous Revenues	<u>28,775</u>	<u>21,433</u>	<u>13,702</u>
<b>TOTAL REVENUES</b>	<u>\$ 1,671,420</u>	<u>\$ 1,455,434</u>	<u>\$ 1,336,009</u>
<b>EXPENDITURES</b>			
Service Operations:			
Security and Public Safety	\$ 476,017	\$ 470,533	\$ 474,394
Mobility and Transportation	148,451	40,136	41,307
Visual Improvements and Cultural	99,618	95,660	82,610
Business Development	385,796	322,499	250,982
Administrative Expenditures	430,079	451,560	380,157
Creation and Petition Services	<u></u>	<u></u>	<u>40,950</u>
<b>TOTAL EXPENDITURES</b>	<u>\$ 1,539,961</u>	<u>\$ 1,380,388</u>	<u>\$ 1,270,400</u>
<b>NET CHANGE IN FUND BALANCES</b>	\$ 131,459	\$ 75,046	\$ 65,609
<b>FUND BALANCE – Beginning of the Year</b>	<u>660,364</u>	<u>585,318</u>	<u>519,709</u>
<b>FUND BALANCE – End of the Year</b>	<u>\$ 791,823</u>	<u>\$ 660,364</u>	<u>\$ 585,318</u>

See accompanying independent auditor's report.

		Percent of Total Revenues				
<u>2011</u>	<u>2010</u>	<u>2014</u>	<u>2013</u>	<u>2012</u>	<u>2011</u>	<u>2010</u>
\$ 1,216,293	\$	96.7%	96.7%	97.3%	95.6%	
30,768		1.4	1.6	1.5	2.4	
1,597		0.2	0.2	0.2	0.1	
23,476		1.7	1.5	1.0	1.9	
<u>\$ 1,272,134</u>	<u>\$</u>	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>	
\$ 406,687	\$	28.4%	32.3%	35.5%	32.0%	
127,834		8.9	2.8	3.1	10.0	
43,871		6.0	6.6	6.2	3.4	
101,092		23.1	22.2	18.8	7.9	
365,614		25.7	31.0	28.4	28.7	
				3.1		
<u>\$ 1,045,098</u>	<u>\$</u>	<u>92.1%</u>	<u>94.9%</u>	<u>95.1%</u>	<u>82.0%</u>	
\$ 227,036	\$	7.9%	5.1%	4.9%	18.0%	N/A
292,673						
<u>\$ 519,709</u>	<u>\$ N/A</u>					

See accompanying independent auditor's report.



**MONTROSE MANAGEMENT DISTRICT**  
**COMPARATIVE SCHEDULE OF REVENUES AND EXPENDITURES**  
**EAST ZONE – FIVE YEARS**

	<u>Amounts</u>		
	<u>2014</u>	<u>2013</u>	<u>2012</u>
<b>REVENUES</b>			
Assessment Revenues	\$ 494,038	\$ 426,034	\$ 418,367
Penalty and Interest	9,886	8,844	8,316
Investment Revenues	1,456	1,607	1,663
Miscellaneous Revenues	<u>22,245</u>	<u>11,275</u>	<u>5,536</u>
<b>TOTAL REVENUES</b>	<u>\$ 527,625</u>	<u>\$ 447,760</u>	<u>\$ 433,882</u>
<b>EXPENDITURES</b>			
Service Operations:			
Security and Public Safety	\$ 153,718	\$ 151,680	\$ 153,360
Mobility and Transportation	47,504	12,879	13,255
Visual Improvements and Cultural	44,551	39,257	35,092
Business Development	123,874	103,876	82,156
Administrative Expenditures	161,496	165,582	140,992
Creation and Petition Services	<u></u>	<u></u>	<u>13,141</u>
<b>TOTAL EXPENDITURES</b>	<u>\$ 531,143</u>	<u>\$ 473,274</u>	<u>\$ 437,996</u>
<b>NET CHANGE IN FUND BALANCE</b>	\$ (3,518)	\$ (25,514)	\$ (4,114)
<b>FUND BALANCE – Beginning of the Year</b>	<u>308,316</u>	<u>333,830</u>	<u>337,944</u>
<b>FUND BALANCE – End of the Year</b>	<u>\$ 304,798</u>	<u>\$ 308,316</u>	<u>\$ 333,830</u>

See accompanying independent auditor's report.

		Percent of Total Revenues				
<u>2011</u>	<u>2010</u>	<u>2014</u>	<u>2013</u>	<u>2012</u>	<u>2011</u>	<u>2010</u>
\$ 363,651	\$ 467,273	93.6%	95.1%	96.4%	94.8%	93.1%
10,510	20,513	1.9	2.0	1.9	2.7	4.1
984	394	0.3	0.4	0.4	0.3	0.1
<u>8,444</u>	<u>13,547</u>	<u>4.2</u>	<u>2.5</u>	<u>1.3</u>	<u>2.2</u>	<u>2.7</u>
<u>\$ 383,589</u>	<u>\$ 501,727</u>	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>
\$ 180,407	\$ 137,642	29.1%	33.9%	35.3%	47.0%	27.4%
2,546		9.0	2.9	3.1	0.7	0.0
23,080	12,636	8.4	8.8	8.1	6.0	2.5
41,502	20,359	23.5	23.2	18.9	10.8	4.1
90,783	148,386	30.6	37.0	32.5	23.7	29.6
		<u>0.0</u>	<u>0.0</u>	<u>3.0</u>	<u>0.0</u>	<u>0.0</u>
<u>\$ 338,318</u>	<u>\$ 319,023</u>	<u>100.6%</u>	<u>105.8%</u>	<u>100.9%</u>	<u>88.2%</u>	<u>63.6%</u>
\$ 45,271	\$ 182,704	<u>(0.6)%</u>	<u>(5.8)%</u>	<u>(0.9)%</u>	<u>11.8%</u>	<u>36.4%</u>
<u>292,673</u>	<u>109,969</u>					
<u>\$ 337,944</u>	<u>\$ 292,673</u>					

See accompanying independent auditor's report.

**MONTROSE MANAGEMENT DISTRICT**  
**COMPARATIVE SCHEDULE OF REVENUES AND EXPENDITURES**  
**WEST ZONE – FIVE YEARS**

	<u>Amounts</u>		
	<u>2014</u>	<u>2013</u>	<u>2012</u>
<b>REVENUES</b>			
Assessment Revenues	\$ 1,122,826	\$ 980,905	\$ 880,710
Penalty and Interest	12,593	15,002	11,806
Investment Revenues	1,846	1,609	1,445
Miscellaneous Revenues	<u>6,530</u>	<u>10,158</u>	<u>8,166</u>
<b>TOTAL REVENUES</b>	<u>\$ 1,143,795</u>	<u>\$ 1,007,674</u>	<u>\$ 902,127</u>
<b>EXPENDITURES</b>			
Service Operations:			
Security and Public Safety	\$ 322,299	\$ 318,853	\$ 321,034
Mobility and Transportation	100,947	27,257	28,052
Visual Improvements and Cultural	55,067	56,403	47,518
Business Development	261,922	218,623	168,826
Administrative Expenditures	268,583	285,978	239,165
Creation and Petition Services	<u>                    </u>	<u>                    </u>	<u>27,809</u>
<b>TOTAL EXPENDITURES</b>	<u>\$ 1,008,818</u>	<u>\$ 907,114</u>	<u>\$ 832,404</u>
<b>NET CHANGE IN FUND BALANCE</b>	\$ 134,977	\$ 100,560	\$ 69,723
<b>FUND BALANCE – Beginning of the Year</b>	<u>352,048</u>	<u>251,488</u>	<u>181,765</u>
<b>FUND BALANCE – End of the Year</b>	<u>\$ 487,025</u>	<u>\$ 352,048</u>	<u>\$ 251,488</u>

See accompanying independent auditor's report.

		Percent of Total Revenues				
<u>2011</u>	<u>2010</u>	<u>2014</u>	<u>2013</u>	<u>2012</u>	<u>2011</u>	<u>2010</u>
\$ 852,642	\$	98.2%	97.3%	97.6%	96.0%	
20,258		1.1	1.5	1.3	2.3	
613		0.2	0.2	0.2	0.1	
<u>15,032</u>	<u></u>	<u>0.5</u>	<u>1.0</u>	<u>0.9</u>	<u>1.6</u>	<u></u>
<u>\$ 888,545</u>	<u>\$</u>	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>	<u></u>
\$ 226,280	\$	28.2%	31.6%	35.6%	25.5%	
125,288		8.8	2.7	3.1	14.1	
20,791		4.8	5.6	5.3	2.3	
59,590		22.9	21.7	18.7	6.7	
274,831		23.5	28.4	26.5	30.9	
<u></u>	<u></u>	<u>0.0</u>	<u>0.0</u>	<u>3.1</u>	<u>0.0</u>	<u></u>
<u>\$ 706,780</u>	<u>\$</u>	<u>88.2%</u>	<u>90.0%</u>	<u>92.3%</u>	<u>79.5%</u>	<u></u>
\$ 181,765	\$	<u>11.8%</u>	<u>10.0%</u>	<u>7.7%</u>	<u>20.5%</u>	<u>N/A</u>
<u>\$ 181,765</u>	<u>\$ N/A</u>					

See accompanying independent auditor's report.



**MONTROSE MANAGEMENT DISTRICT**  
**BOARD MEMBERS, KEY PERSONNEL AND CONSULTANTS**  
**DECEMBER 31, 2014**

<b>Board Members (Continued)</b>	<b>Term of Office (Appointed)</b>	<b>Fees of office for the year ended <u>December 31, 2014</u></b>	<b>Expense reimbursements for the year ended <u>December 31, 2014</u></b>	<b><u>Position</u></b>
Vacant				11
Brad Nagar	07/13 06/17 (Appointed)	\$ -0-	\$ -0-	12 – Assistant Secretary
Dan Leverett	07/14 06/15 (Appointed)	\$ -0-	\$ -0-	13
Vacant				14
Randall Ellis	07/14 06/15 (Appointed)	\$ -0-	\$ -0-	15

See accompanying independent auditor's report.

**MONTROSE MANAGEMENT DISTRICT  
BOARD MEMBERS, KEY PERSONNEL AND CONSULTANTS  
DECEMBER 31, 2014**

<b>Consultants:</b>	<u>Date Hired</u>	<u>Fees for the year ended December 31, 2014</u>	<u>Title</u>
Bracewell & Giuliani	03/01/13	\$ 27,518	Attorney
McCall Gibson Swedlund Barfoot PLLC	02/18/09	\$ 8,000	Auditor
Equi-Tax Inc.	02/20/08	\$ 21,799	Assessment Collector and Database Management
Municipal Accounts and Consulting LP	08/20/08	\$ 20,268	Bookkeeper
Hawes Hill Calderon LLP	01/31/07	\$ 243,693	Administrator
Greater East End Management District	07/16/08	\$ 66,560	Graffiti Abatement
Mark M. Burton PLLC	11/1/09	\$ 3,850	Annual Financial Report

See accompanying independent auditor's report.





MONTROSE MANAGEMENT DISTRICT  
CITY OF HOUSTON  
HARRIS COUNTY, TEXAS

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**AGENDA MEMORANDUM**

TO: Montrose Management District Board of Directors  
FROM: Executive Director  
SUBJECT: Agenda Item Materials

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9. Receive Reports

- a) Public Safety
- b) Mobility & Visual Improvements
  - i. Receive update on TXDOT bridges
  - ii. Consider recommendations for prioritization of signage and esplanade improvements in the District
  - iii. Consider an amended approach to the Special Parking Area application to the City of Houston
  - iv. Consider proposal to remove the Montrose gateway monument at Westheimer and Bagby Streets
- c) Marketing and Business Development
  - i. Consider Committee recommendation for services agreement with Michael Hardy to provide professional writing services for the District in the amount of \$500.00 per feature article for a total monthly cost not to exceed \$2,000.00
- d) Business Ambassador
- e) Business and Economic Development
- f) Executive Director

Shift Period: Jun-15  
Total Hours Worked 552:00  
Total Miles Driven 2,045

## Crime Arrest Activity

Felony Arrests:	11
Misdemeanor Arrests:	50
Charges Filed:	27
Suspects in Jail:	70

## Patrol Activity

Calls for Service:	234
CIT Calls:	0
Incident Reports:	17
Accident Reports	0
Locations Checked:	1376

## Field Activity

Parking Tickets:	1
Citations:	2
BMV Report Cards:	1318
Crime Prevention:	365

## Warrants

Felony Warrants:	4
Misdemeanor Warrants:	0
City Warrants:	50
SETCIC Warrants:	13

## Arrest Summary

Shift Period Jun-15	
Charge	# of Arrests
Affray	2
Assault	2
City Warrants	7
Criminal Mischief	2
Criminal Trespass	12
Evading Arrest	1
Felony Evading	3
Felony Theft	1
Felony Warrant	1
Interfering with a Peace Officer	1
Littering	1
Parole Violation	1
Possession of a Controlled Substance	6
Possession of Marijuana	1
Public Intoxication	20
Public Lewdness	1
Robbery	1
Setcic Warrant	4
Theft	2
Urinating in Public	1

# Patrol Summary

[Print to PDF](#)

Total Arrests	70
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**MONTROSE MANAGEMENT DISTRICT  
CITY OF HOUSTON  
HARRIS COUNTY, TEXAS**

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**AGENDA MEMORANDUM**

**TO:** Montrose Management District Board of Directors  
**FROM:** Executive Director  
**SUBJECT:** Agenda Item Materials

---

- 9. Receive reports.
  - b. Mobility and Visual Improvement
    - i. Receive update on TxDOT bridges

To: Montrose Board of Directors

 From: Bill Calderon  
Special Projects manager

Date: July 6, 2015

RE: Status of the Bridge Lighting project

Walter P Moore staff have begun the task of layering into the plans additional sheets for each of the seven bridge structures detailing how the lights will be attached to the structures as requested by TxDOT. WPM will also be reviewing previously prepared sheet detail that had not been stamped either by TxDOT staff or the engineers engaged to assist with the lighting detail earlier in the year, in order to also stamp and seal those sheets. WPM has indicated they felt they would be done with their work at the end of July and would be ready to submit to TxDOT for final approval of the plans at that time.

In a meeting held June 18 with Mark Patterson, concerns were also addressed regarding information received from TxDOT staff regarding conflicting bidding dates that had been "assigned" the project by different staff within the District office. Also discussed was the attached email that indicated a potential loss of funding if the project was not bid before the end of the TxDOT fiscal year. Mr. Patterson made assurances that the project would not lose funding once the plans were turned into to TxDOT for bidding, even if the bid date was not before the end of August this year.

I did indicate that we believed the District would be in a ready position to likely pursue a bidding of the project in the early to late fall. Mr. Patterson did indicate that he believed that would be fine, especially in light of the approved advanced funding agreement having a final date of August 2016 to bid the project.

He also indicated that he would be comfortable only requiring that the District advance the 20% required pursuant to the Advanced Funding Agreement based on the total grant amount, instead of the estimated project amount, in order to minimize the cashflow impact to the District pending receipt of the bids.

Lastly, we have reengaged Tradition Bank in discussions regarding the loan facility in order to have a loan agreement prepared for the board to consider in time for funding the TxDOT project. We anticipate having that agreement ready no later than the September board meeting.

**From:** Mark Patterson Mark.Patterson@txdot.gov  
**Subject:** FW: TE Funding Lapse Memo to All DE's, TP&D Directors, and TE Coordinators 6-12-15 - HOU  
**Date:** June 18, 2015 at 2:52 PM  
**To:** Bill Calderon (bcalderon@hhcllp.com) bcalderon@hhcllp.com



Bill,

Here is the e-mail from Austin that we discussed.

**Mark D. Patterson**  
**Director of Consultant Contracts**  
**Houston District**  
**Texas Department of Transportation**  
**7600 Washington Avenue**  
**Houston, Texas 77007**  
**713-802-5501**

**From:** Shawn McMahon  
**Sent:** Friday, June 12, 2015 4:02 PM  
**To:** Ana Ramirez Huerta; Mark Patterson; Quincy Allen; Sonja Trojan; Pat Henry  
**Cc:** Pete Krause; Rene Garcia  
**Subject:** TE Funding Lapse Memo to All DE's, TP&D Directors, and TE Coordinators 6-12-15 - HOU

We have received information from FHWA regarding the availability of federal funds for the Transportation Enhancement Program. There are current DEADLINES that must be met in order for projects selected by the TTC to retain their federal TE funding availability and for the State to fully utilize the federal funds before the Program closes.

The apportionment for the TE program and any remaining TE projects could lapse at the end of FY 2015. Finance Division has indicated that this is a possibility, but believes that FHWA will not put us in the position to not honor our commitment with those entities whom we have executed AFA's and a committed construction obligation due date by the end of AUG 2016. However, we think that everyone should be aware that there is a distinct possibility that FHWA could apply the end of Fiscal Year 2015 (September 30- Federal) (August 31 - State), as TE funds' final lapse date for obligation and rescind any TE funds that have not been obligated at that time.

In an effort to make sure all viable projects are moving forward and those that are not viable are closed out, we have attached a spreadsheet showing projects in each district that are active in the Federal Management Information System (FMIS). If you have any projects on this list that are not currently in construction, or on an active letting schedule, we ask that you provide the following information:

1. Complete Columns M & N in the attached spreadsheet for your District and return to DES by JUN 19, 2015.
2. For those projects that you know are complete, the District will need to take action to have a Statement of Cost submitted to FIN and a Closing Statement issued by JUL 15, 2015.
3. Also, when the close-outs are complete, please provide a copy of your actions taken with their dates, and the funding amount to be returned to the program (if any), to Pete Krause, Director of

the Landscape/Enhancement Section, DES Division.

(You may resend and re-date the same spreadsheet used in Item 1, if that is helpful).

If there are monies being returned to the program because of these reconciliations, there is a small window of opportunity during the month of AUG 2015, for reassignment to take place with FHWA rather than have the funds lapse altogether. In an effort to make sure we are not leaving money on the table, we need your assistance to make sure that all completed projects from your District have been officially closed-out through FIN and that any project that still needs their funds are accounted for in the UTP projection, with their correct letting dates and status shown on the spreadsheet. If a project did not use all of their funding – how much remains to be returned?

Additionally, to confirm which projects should retain their active status, the following information will be helpful:

- If work has begun on a project, what is the percentage of completion?
- If projects were let but work not begun, was it awarded? If so, is it moving forward? If not, can it be relet before the deadline or will it be closed?
- Will projects be ready to let by the date stipulated in their AFA?  
If not, can they be closed so that the monies can potentially be re-obligated by this AUG?

We need to know the answers to these questions by JUL 15 in order to fully utilize the program funds.

If projects are viable, and will make their projected letting dates on schedule, we recommend getting them to the point of obligating some federal funds for them as soon as possible, prior to SEP 30, 2015. At least, obligate some PE at this point to cover TxDOT Administrative costs. Please consider working with the project sponsors to move these projects to letting as soon as possible. Waiting until the last possible letting date will leave no room for error and could put the project funding in jeopardy. There will be no extensions past the last possible obligation date of AUG 31, 2016.

We realize this is a short turn-a-round, but these projects are dictated by federal funds and MAP-21 made some major changes to the federal programs. Please contact Shawn McMahon or me with any questions:

Pete Krause  
Landscape Architect  
Landscape Enhancement Section  
Design Division  
512.416.2714  
[pete.krause@txdot.gov](mailto:pete.krause@txdot.gov)

**Shawn McMahon**  
Transportation Enhancement  
& Landscape Section Program Specialist  
Design Division, Austin, TX  
Texas Department of Transportation  
512-416-2749  
[Shawn.McMahon@txdot.gov](mailto:Shawn.McMahon@txdot.gov)



**MONTROSE MANAGEMENT DISTRICT  
CITY OF HOUSTON  
HARRIS COUNTY, TEXAS**

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**AGENDA MEMORANDUM**

**TO:** Montrose Management District Board of Directors  
**FROM:** Executive Director  
**SUBJECT:** Agenda Item Materials

---

9. Receive reports.

b. Mobility and Visual Improvement

ii. Consider recommendations for prioritization of signage and  
esplanade improvements in the District



## Item 9bii Staff Report

### **Title: Consider Recommendations for Prioritization of Signage and Esplanade Improvements in the District**

Summary: Staff is requesting approval to initiate funding of signage and esplanade improvements as funding becomes available and based upon prioritization of locations and improvements by the Board and final material selection by the Mobility and Visual Improvement Committee.

Consultants for the District have completed design for 55 medians and signage at 28 gateway locations. Staff has coordinated with the consultant team to break implementation of median and signage improvements into phases that can be implemented, partially or in full, as funding permits. Due to the substantially higher cost, esplanades have been divided into four phases while signage is proposed to be completed in two. Initial phases of each are proposed as follows:

Esplanades: Phase 1 proposes a focus on six esplanades in the heart of Montrose along Montrose, Lovett and Yoakum Boulevards for an estimated total cost of \$554,026.

Signage: Phase 1 proposes construction of signage treatments at 19 of the 28 total locations for a total cost of \$414,017. The initial phase includes 17 gateway intersections as well as treatments at the intersections of Westheimer Road and Richmond Street with Montrose Boulevard.

Cost estimates for esplanades included as attachments in this Board Book are based upon an extensive material list; however, alternative materials may be available that would allow for similar quality of development at a potentially reduced cost. The request by staff would allow for the Mobility and Visual Improvement Committee members to select an alternative material, assuming that such amendment did not impair the quality of the esplanade or result in an increased price.

Funding for signage and esplanade improvements has been contingent upon the amount of funding needed and timing for the bridge lighting project. At this time, staff and TxDOT have reached agreement regarding the bridge lighting project to the point that District staff can begin an implementation program.

**Requested action: Approval to initiate signage and esplanade improvements as funding becomes available and based upon prioritization of locations and improvements by the Board and final material selection by the Mobility and Visual Improvement Committee.**

ITEM	QTY	UNIT	UNIT COST	ITEM TOTAL	REMARKS
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### Montrose Blvd. Esplanades

#### 1 Esplanade

Demolition & Repair	300	sf.	\$10.00	\$3,000.00	Excavation, Spoil Removal, & Repair to Existing Conditions
4"x8" Granite Set Pavers	1,930	sf.	\$15.00	\$28,950.00	Includes Granite Paver Sets
Concrete Sub-base	1,930	sf.	\$20.00	\$38,600.00	4 1/2" thick
Mulch	6	cy.	\$40.00	\$240.00	4" Depth
Knockout Roses	33	ea.	\$25.00	\$825.00	3 Gal.
Wedelia	46	ea.	\$6.50	\$299.00	1 Gal.
Foxtail Fern	142	ea.	\$20.00	\$2,840.00	3 Gal.
Bottlebrush Tree	6	ea.	\$450.00	\$2,700.00	45 Gal.
Blackstar Gravel	12	cy.	\$150.00	\$1,800.00	4" Thick on Filter Fabric
Irrigation	2	ea.	\$4,500.00	\$9,000.00	Drip, Tubing, Controller, Meter, etc.
Traffic Control & Mobilization	1	ea.	\$3,000.00	\$3,000.00	
Traffic Control Permits	1% sub-total			\$912.54	1% of job total

**Sub-Total 1 Esplanade \$92,166.54**

### Lovett Blvd. Esplanades

#### 4 Esplanades

Demolition & Repair	750	sf.	\$10.00	\$7,500.00	Excavation, Spoil Removal, & Repair to Existing Conditions
4"x8" Granite Set Pavers	7,417	sf.	\$15.00	\$111,255.00	Includes Granite Paver Sets
Concrete Sub-base	7,417	sf.	\$20.00	\$148,340.00	4 1/2" thick
Mulch	22	cy.	\$40.00	\$880.00	4" Depth
Knockout Roses	123	ea.	\$25.00	\$3,075.00	3 Gal.
Wedelia	163	ea.	\$6.50	\$1,059.50	1 Gal.
Foxtail Fern	519	ea.	\$20.00	\$10,380.00	3 Gal.
Bottlebrush Tree	21	ea.	\$450.00	\$9,450.00	45 Gal.
Blackstar Gravel	40	cy.	\$150.00	\$6,000.00	4" Thick on Filter Fabric
Irrigation	8	ea.	\$4,500.00	\$36,000.00	Drip, Tubing, Controller, Meter, etc.
Traffic Control & Mobilization	1	ea.	\$3,000.00	\$3,000.00	
Traffic Control Permits	1% sub-total			\$3,369.40	1% of job total

**Sub-Total 4 Esplanades \$340,308.90**

### Yoakum Blvd. Esplanades

#### 1 Esplanade

Demolition & Repair	100	sf.	\$10.00	\$1,000.00	Excavation, Spoil Removal, & Repair to Existing Conditions
4"x8" Granite Set Pavers	1,391	sf.	\$15.00	\$20,865.00	Includes Granite Paver Sets
Concrete Sub-base	1,391	sf.	\$20.00	\$27,820.00	4 1/2" thick
Mulch	3	cy.	\$40.00	\$120.00	4" Depth
Knockout Roses	53	ea.	\$25.00	\$1,325.00	3 Gal.
Wedelia	0	ea.	\$6.50	\$0.00	1 Gal.
Foxtail Fern	105	ea.	\$20.00	\$2,100.00	3 Gal.
Bottlebrush Tree	10	ea.	\$450.00	\$4,500.00	45 Gal.
Blackstar Gravel	5	cy.	\$150.00	\$750.00	4" Thick on Filter Fabric
Irrigation	2	ea.	\$4,500.00	\$9,000.00	Drip, Tubing, Controller, Meter, etc.
Traffic Control & Mobilization	1	ea.	\$3,000.00	\$3,000.00	
Traffic Control Permits	1% sub-total			\$704.80	1% of job total

**Sub-Total 1 Esplanade \$71,184.80**

**Overall Subtotal \$503,660.24**

**10% Contingency \$50,366.02**

**Total Estimate \$554,026.26**

**Montrose Mgmt. District Identity Markers**

 Memorial City Management District  
 Kudela & Weinheimer - Landscape Architects

Cost Estimate

 6/26/2015  
 MON-351

ITEM	QTY	UNIT	UNIT COST	ITEM TOTAL	REMARKS
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**Encroachment Application 1**
**Intersection 1- W. Dallas St./S. Shepherd Dr.**

Demolition & Repair	1	ea	\$150.00	\$150.00	Excavation, Spoil Removal, & Repair to Existing Conditions
Identity Marker Sign w/ Pole	1	ea	\$10,000.00	\$10,000.00	Sign, Cabinet, & Pin Mounted Logo
Light Fixture, Controller, and Enclosure Allowance	1	ls	\$8,000.00	\$8,000.00	By Traxon
Poz Lock Base w/ Concrete Foundation	1	ea	\$1,000.00	\$1,000.00	
R.O.W. Excavation Permit	1	ea	\$275.00	\$275.00	To be pulled by contractor
COH Plan Review Fee	1	ea	\$170.00	\$170.00	

**Intersection 1 Sub-total \$19,595.00**
**Intersection 2- W. Gray St./S. Shepherd Dr.**

Demolition & Repair	2	ea	\$150.00	\$300.00	Excavation, Spoil Removal, & Repair to Existing Conditions
Identity Marker Sign w/ Pole	2	ea	\$10,000.00	\$20,000.00	Sign, Cabinet, & Pin Mounted Logo
Light Fixture, Controller, and Enclosure Allowance	2	ls	\$8,000.00	\$16,000.00	By Traxon
Poz Lock Base w/ Concrete Foundation	2	ea	\$1,000.00	\$2,000.00	
R.O.W. Excavation Permit	2	ea	\$275.00	\$550.00	To be pulled by contractor
COH Plan Review Fee	1	ea	\$170.00	\$170.00	

**Intersection 2 Sub-total \$39,020.00**
**Intersection 3- Westheimer Rd./S. Shepherd Dr.**

Demolition & Repair	1	ea	\$150.00	\$150.00	Excavation, Spoil Removal, & Repair to Existing Conditions
Identity Marker Sign w/ Pole	1	ea	\$10,000.00	\$10,000.00	Sign, Cabinet, & Pin Mounted Logo
Light Fixture, Controller, and Enclosure Allowance	1	ls	\$8,000.00	\$8,000.00	By Traxon
Poz Lock Base w/ Concrete Foundation	1	ea	\$1,000.00	\$1,000.00	
R.O.W. Excavation Permit	1	ea	\$275.00	\$275.00	To be pulled by contractor
COH Plan Review Fee	1	ea	\$170.00	\$170.00	

**Intersection 3 Sub-total \$19,595.00**
**Intersection 4- W. Alabama St./S. Shepherd Dr.**

Demolition & Repair	1	ea	\$150.00	\$150.00	Excavation, Spoil Removal, & Repair to Existing Conditions
Identity Marker Sign w/ Pole	1	ea	\$10,000.00	\$10,000.00	Sign, Cabinet, & Pin Mounted Logo
Light Fixture, Controller, and Enclosure Allowance	1	ls	\$8,000.00	\$8,000.00	By Traxon
Poz Lock Base w/ Concrete Foundation	1	ea	\$1,000.00	\$1,000.00	
R.O.W. Excavation Permit	1	ea	\$275.00	\$275.00	To be pulled by contractor
COH Plan Review Fee	1	ea	\$170.00	\$170.00	

**Intersection 4 Sub-total \$19,595.00**
**Intersection 5- Richmond Ave./S. Shepherd Dr.**

Demolition & Repair	1	ea	\$150.00	\$150.00	Excavation, Spoil Removal, & Repair to Existing Conditions
Identity Marker Sign w/ Pole	1	ea	\$10,000.00	\$10,000.00	Sign, Cabinet, & Pin Mounted Logo
Light Fixture, Controller, and Enclosure Allowance	1	ls	\$8,000.00	\$8,000.00	By Traxon
Poz Lock Base w/ Concrete Foundation	1	ea	\$1,000.00	\$1,000.00	
R.O.W. Excavation Permit	1	ea	\$275.00	\$275.00	To be pulled by contractor
COH Plan Review Fee	1	ea	\$170.00	\$170.00	

**Intersection 5 Sub-total \$19,595.00**
**Encroachment Application Fee \$1,231.04**
**Sub-Total Encroachment Application 1 \$118,631.04**

### Encroachment Application 3

#### Intersection 8- W. Dallas St./Waugh Dr.

Demolition & Repair	2	ea	\$150.00	\$300.00	Excavation, Spoil Removal, & Repair to Existing Conditions
Identity Marker Sign w/ Pole	2	ea	\$10,000.00	\$20,000.00	Sign, Cabinet, & Pin Mounted Logo
Light Fixture, Controller, and Enclosure Allowance	2	ls	\$8,000.00	\$16,000.00	By Traxon
Poz Lock Base w/ Concrete Foundation	2	ea	\$1,000.00	\$2,000.00	
R.O.W. Excavation Permit	2	ea	\$275.00	\$550.00	To be pulled by contractor
COH Plan Review Fee	1	ea	\$170.00	\$170.00	

Intersection 8 Sub-total **\$39,020.00**  
 Encroachment Application Fee **\$1,231.04**

**Sub-Total Encroachment Application 3 \$40,251.04**

### Encroachment Application 4

#### Intersection 10- W. Dallas St./Montrose Blvd.

Demolition & Repair	1	ea	\$150.00	\$150.00	Excavation, Spoil Removal, & Repair to Existing Conditions
Identity Marker Sign w/ Pole	1	ea	\$10,000.00	\$10,000.00	Sign, Cabinet, & Pin Mounted Logo
Light Fixture, Controller, and Enclosure Allowance	1	ls	\$8,000.00	\$8,000.00	By Traxon
Poz Lock Base w/ Concrete Foundation	1	ea	\$1,000.00	\$1,000.00	
R.O.W. Excavation Permit	1	ea	\$275.00	\$275.00	To be pulled by contractor
COH Plan Review Fee	1	ea	\$170.00	\$170.00	

Intersection 10 Sub-Total **\$19,595.00**

#### Intersection 12- Westheimer Rd./Montrose Blvd.

Demolition & Repair	2	ea	\$150.00	\$300.00	Excavation, Spoil Removal, & Repair to Existing Conditions
Identity Marker Sign w/ Pole	2	ea	\$10,000.00	\$20,000.00	Sign, Cabinet, & Pin Mounted Logo
Light Fixture, Controller, and Enclosure Allowance	2	ls	\$8,000.00	\$16,000.00	By Traxon
Poz Lock Base w/ Concrete Foundation	2	ea	\$1,000.00	\$2,000.00	
R.O.W. Excavation Permit	2	ea	\$275.00	\$550.00	To be pulled by contractor
COH Plan Review Fee	1	ea	\$170.00	\$170.00	

Intersection 12 Sub-Total **\$39,020.00**

#### Intersection 14- Richmond Ave./Montrose Blvd.

Demolition & Repair	1	ea	\$150.00	\$150.00	Excavation, Spoil Removal, & Repair to Existing Conditions
Identity Marker Sign w/ Pole	1	ea	\$10,000.00	\$10,000.00	Sign, Cabinet, & Pin Mounted Logo
Light Fixture, Controller, and Enclosure Allowance	1	ls	\$8,000.00	\$8,000.00	By Traxon
Poz Lock Base w/ Concrete Foundation	1	ea	\$1,000.00	\$1,000.00	
R.O.W. Excavation Permit	1	ea	\$275.00	\$275.00	To be pulled by contractor
COH Plan Review Fee	1	ea	\$170.00	\$170.00	

Intersection 14 Sub-Total **\$19,595.00**

#### Intersection 16- Bissonette/Montrose Blvd.

Demolition & Repair	2	ea	\$150.00	\$300.00	Excavation, Spoil Removal, & Repair to Existing Conditions
Identity Marker Sign w/ Pole	2	ea	\$10,000.00	\$20,000.00	Sign, Cabinet, & Pin Mounted Logo
Light Fixture, Controller, and Enclosure Allowance	2	ls	\$8,000.00	\$16,000.00	By Traxon
Poz Lock Base w/ Concrete Foundation	2	ea	\$1,000.00	\$2,000.00	
R.O.W. Excavation Permit	2	ea	\$275.00	\$550.00	To be pulled by contractor
COH Plan Review Fee	1	ea	\$170.00	\$170.00	

Intersection 16 Total **\$39,020.00**  
 Encroachment Application Fee **\$1,231.04**

**Sub-Total Encroachment Application 4 \$118,461.04**

### Encroachment Application 5

#### Intersection 17- W. Dallas St./Taft St.

Demolition & Repair	1	ea	\$150.00	\$150.00	Excavation, Spoil Removal, & Repair to Existing Conditions
Identity Marker Sign w/ Pole	1	ea	\$10,000.00	\$10,000.00	Sign, Cabinet, & Pin Mounted Logo
Light Fixture, Controller, and Enclosure Allowance	1	ls	\$8,000.00	\$8,000.00	By Traxon
Poz Lock Base w/ Concrete Foundation	1	ea	\$1,000.00	\$1,000.00	
R.O.W. Excavation Permit	1	ea	\$275.00	\$275.00	To be pulled by contractor
COH Plan Review Fee	1	ea	\$170.00	\$170.00	

Intersection 17 Sub-Total **\$19,595.00**

**Montrose Mgmt. District Identity Markers**Memorial City Management District  
Kudela & Weinheimer - Landscape Architects**Cost Estimate**6/26/2015  
MON-351**Intersection 18- W. Gray St./Taft St.**

Demolition & Repair	2	ea	\$150.00	\$300.00	Excavation, Spoil Removal, & Repair to Existing Conditions
Identity Marker Sign w/ Pole	2	ea	\$10,000.00	\$20,000.00	Sign, Cabinet, & Pin Mounted Logo
Light Fixture, Controller, and Enclosure Allowance	2	ls	\$8,000.00	\$16,000.00	By Traxon
Poz Lock Base w/ Concrete Foundation	2	ea	\$1,000.00	\$2,000.00	
R.O.W. Excavation Permit	2	ea	\$275.00	\$550.00	To be pulled by contractor
COH Plan Review Fee	1	ea	\$170.00	\$170.00	

**Intersection 18 Sub-Total \$39,020.00****Intersection 19- Fairview St./Genessee St.**

Demolition & Repair	1	ea	\$150.00	\$150.00	Excavation, Spoil Removal, & Repair to Existing Conditions
Identity Marker Sign w/ Pole	1	ea	\$10,000.00	\$10,000.00	Sign, Cabinet, & Pin Mounted Logo
Light Fixture, Controller, and Enclosure Allowance	1	ls	\$8,000.00	\$8,000.00	By Traxon
Poz Lock Base w/ Concrete Foundation	1	ea	\$1,000.00	\$1,000.00	
R.O.W. Excavation Permit	1	ea	\$275.00	\$275.00	To be pulled by contractor
COH Plan Review Fee	1	ea	\$170.00	\$170.00	

**Intersection 19 Total \$19,595.00****Intersection 20- Westheimer Rd./Bagby St.**

Demolition & Repair	1	ea	\$150.00	\$150.00	Excavation, Spoil Removal, & Repair to Existing Conditions
Identity Marker Sign w/ Pole	1	ea	\$10,000.00	\$10,000.00	Sign, Cabinet, & Pin Mounted Logo
Light Fixture, Controller, and Enclosure Allowance	1	ls	\$8,000.00	\$8,000.00	By Traxon
Poz Lock Base w/ Concrete Foundation	1	ea	\$1,000.00	\$1,000.00	
R.O.W. Excavation Permit	1	ea	\$275.00	\$275.00	To be pulled by contractor
COH Plan Review Fee	1	ea	\$170.00	\$170.00	

**Intersection 20 Sub-Total \$19,595.00****Encroachment Application Fee \$1,231.04****Sub-Total Encroachment Application 5 \$99,036.04****Overall Subtotal \$376,379.16****Total Signs - 19****10% Contingency \$37,637.92****Total Estimate \$414,017.08**

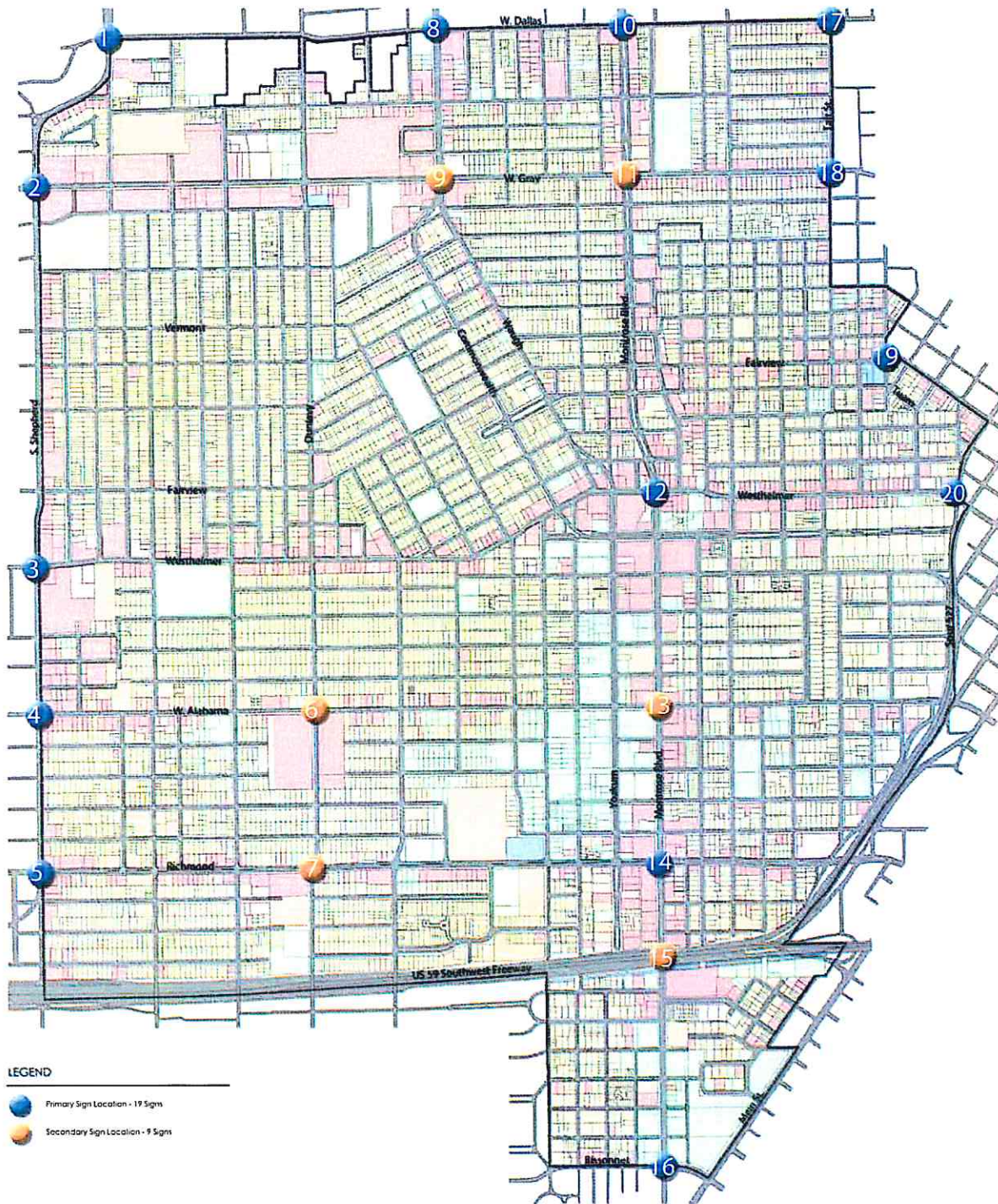




## Esplanade Layout







MONTROSE MANAGEMENT DISTRICT  
CITY OF HOUSTON  
HARRIS COUNTY, TEXAS

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AGENDA MEMORANDUM

TO: Montrose Management District Board of Directors  
FROM: Executive Director  
SUBJECT: Agenda Item Materials

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9. Receive reports.

b. Mobility and Visual Improvement

iii. Consider an amended approach to the Special Parking Area  
application to the City of Houston



## Item 9biii Staff Report

### **Title: Consider an amended approach to the Special Park Area application to the City of Houston**

Summary: Leadership and staff of the District has been in ongoing discussions with the leadership and staff of the City of Houston to establish a version of the Special Parking Area application that addresses both the concerns of the City of Houston and the objectives of the District.

The Montrose Management District has been in development of an application for designation as a Special Parking Area (SPA) in an effort to establish:

1. Parking requirements within the District that are more appropriate to Montrose
2. A parking improvement strategy that is respectful of the character of the Montrose business community and supportive of economic growth

Efforts to designate Montrose as a SPA have struggled as the District and the City have attempted to discover a solution that is appropriate to the complex and nontraditional character and conditions of Montrose. Additional on-site parking would erode the character of the community. Establishing parking garages would provide substantial additional parking to the area, but installations of garages is a long term strategy that will require financing, partnership and planning to ensure that they are appropriately sited. The amended SPA represents an effort to address parking by the following:

1. Implement programs to maximize the use of available parking (and build upon ongoing efforts) such as shared parking and valet parking;
2. Acquire additional parking where strategic and appropriate, including off-site and on-street parking where contextually appropriate;
3. Improve amenities that make walking, biking and transit even better options to arriving via private auto and parking on-site or very nearby;
4. Establishing "sectors" as an initial measure of acceptable walking distance (thereby allowing parking at greater distances to count in meeting parking requirements);
5. Recognizing that the complexity of Montrose requires study and experimentation to determine the most effective set of programs to fully implement and manage a Special Parking Area; and
6. Incorporating measurable objectives and milestones that allow all parties to measure effort and success.

If approved by the Board of Directors, this approach is scheduled to be submitted as a formal application to the City of Houston on July 13 and to be heard by the City of Houston Planning Commission on August 6 with a potential second hearing on August 20 (in the event that no action is taken at the first hearing). The Special Parking Area application requires action by both the Planning Commission and City Council for final approval.

**Requested Action: Approval of the amended Special Parking Area application.**

## Montrose Special Parking Area Application

Montrose Management District  
Houston, Texas

Prepared for  
Montrose Management District

Interim Review Only
Document Incomplete: Not intended for permit or Construction Engineer: Jeremy Rocha P.E. Serial No. 100059 Date: July 08, 2015 Walter P. Moore and Associates, Inc. TBPE Firm Registration No. 1856

Interim Review Only
Document Incomplete: Not intended for permit or Construction Engineer: Lee Ann G. Dixon P.E. Serial No. 5687 Date: July 08, 2015 Walter P. Moore and Associates, Inc. TBPE Firm Registration No. 1856

Prepared by

**WALTER P. MOORE**

Walter P. Moore and Associates, Inc.  
1301 McKinney, Suite 1100  
Houston, Texas 77010

July 2015

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TAB ONE: Property Owners within the Montrose Special Parking Area

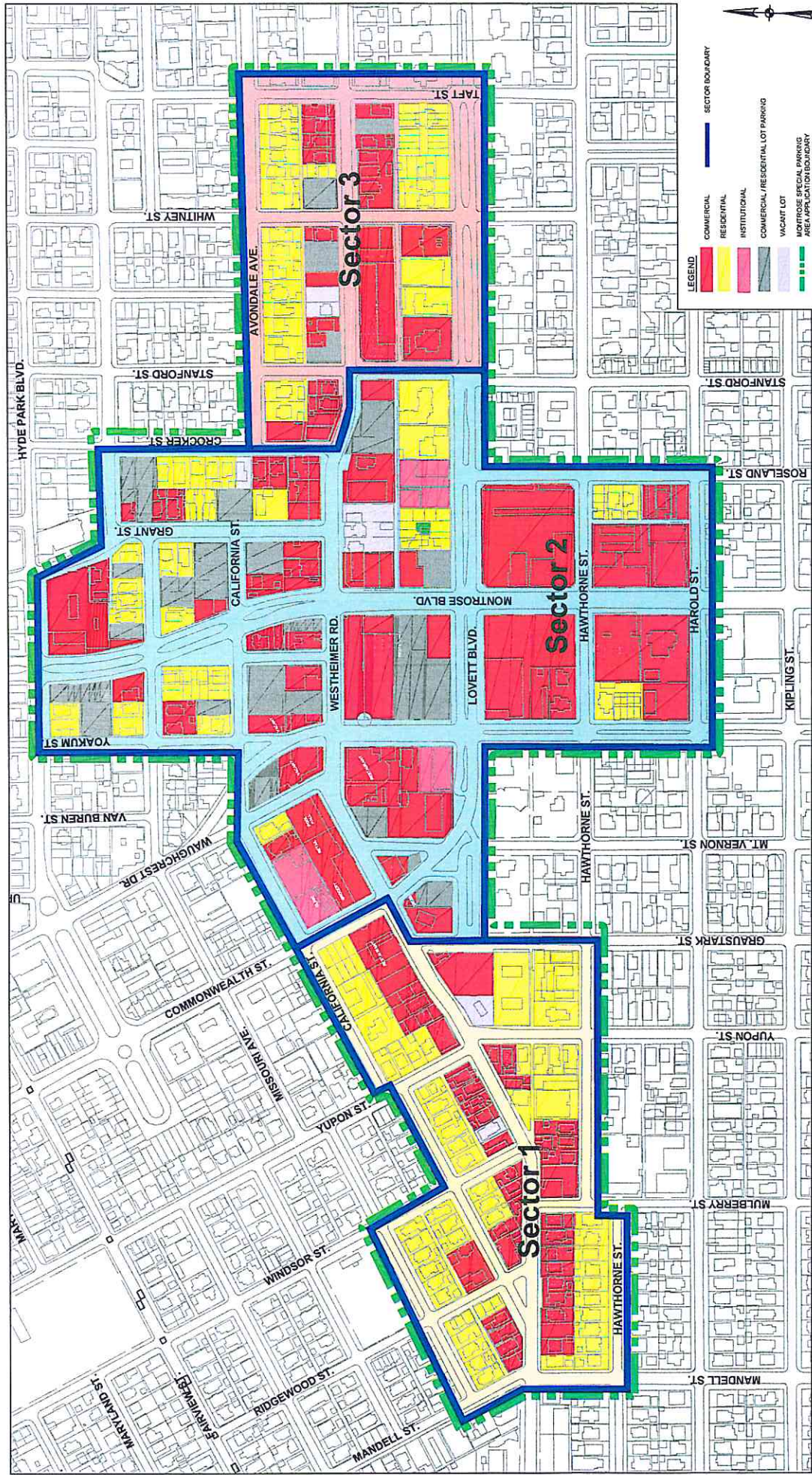
TAB TWO: Property Owners within 500 feet of the Montrose Special Parking Area Boundary

## EXECUTIVE SUMMARY

Montrose Management District (MMD) engaged Walter P Moore to coordinate and submit a Special Parking Area application to the City of Houston as defined by the City Houston's Code of Ordinances Chapter 26, Section 26-511. **Figure ES1** provides a map illustrating the boundaries of the proposed Montrose Special Parking Area (SPA) and the boundaries of each individual property within the proposed special parking area. The Montrose SPA boundary in general is defined as the area along Westheimer Road from Mandell St. to Taft St. and along Montrose Blvd. from Hyde Park Blvd. to Harold St. The proposed Montrose SPA will be subdivided into three sectors. Sector 1 from Mandell to Commonwealth, Sector 2 from Commonwealth to Crocker, and Sector 3 from Crocker to Taft.

DRAFT





# MONTROSE MANAGEMENT DISTRICT SPECIAL PARKING AREA

FIGURE ES1: MONTROSE SPA BOUNDARY

WALTER P MOORE  
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JULY 06, 2015

Project Number: P03-13007-00

Scale: 1" = 300.0'



The MMD and City of Houston Planning Department have worked together to designate a Montrose Special Parking Area that is appropriate to the complex and nontraditional character and conditions of the Greater Montrose Area. Additional on-site parking could erode the character of the community. Establishing parking garages could provide substantial additional parking to the area, but installations of garages is a long term strategy that will require financing, partnership and planning to ensure that they are appropriately sited. The Montrose SPA represents an effort to address parking by the following:

- Implement programs to maximize the use of available parking (and build upon ongoing efforts) such as shared parking and valet parking;
- Acquire additional parking where strategic and appropriate, including off-site and on-street parking where contextually appropriate;
- Improve amenities that make walking, biking and transit even better options to arriving via private auto and parking on-site or very nearby;
- Establishing "sectors" as an initial measure of acceptable walking distance (thereby allowing parking at greater distances to comply meeting parking requirements);
- Recognizing that the uniqueness and complexity of Greater Montrose Area requires study and experimentation to determine the most effective set of programs to fully implement and manage a Special Parking Area; and
- Incorporating measurable objectives and milestones that allow all parties to measure effort and success.

The MMD is requesting that 100% of the required on-street parking be allowed to be provided in parking facilities within a proposed development's Sector or adjacent Sector with a goal of 1,320 foot maximum walking distance.

The MMD plans to utilize the Special Parking Area designation as a tool for organizing and developing parking solutions to further develop the District while being mindful of neighboring land uses. The District has developed milestones to track and measure the Special Parking Area's goals and objectives. The milestone timeline begins upon approval of Montrose SPA application by City of Houston Planning Commission and City Council:

- Confirm Parking supply with the SPA
  - Goal: two weeks
- Engage the surrounding Home Owner's Associations in regards to the SPA's role in the Residential Permit process
  - Goal: one month
- Customer satisfaction surveys – annually, will focus in terms of experience, location of parking, availability, walking distance, wayfinding
  - Goal: one year
  - Implementation: metric of walking distance remain within Sectors or maximum of 1,320 feet)
- Gather information on inventory of Shared Parking Agreements within the SPA and begin tracking
  - Goal: one year
- Gather information on inventory of Valet Parking Operations within the SPA
  - Goal: two months
- Gather information on inventory of Parking Rates within the SPA
  - Goal: one month
- Continue conversation with inventory owners and Developers about Shared Parking leveraging SPA as a tool
  - Goal: on-going
- Community Meeting to discuss SPA with area Community Organization, stakeholders, residents
  - Goal: six months
- Reconfirm and enhance Walter P Moore's audit of infrastructure within the SPA (roadways, sidewalks)
  - Goal: within one year
- Develop a bikeway/pedestrian plan for the SPA, leverage the COH bike plan as a baseline. Personalize it for the SPA

- Goal: within one year
- Investigate alternative modes of transportation within the SPA (jitney, electronic taxi, rickshaw)
  - Goal: two years
- SPA specific wayfinding / navigation system (signage, app, parking, District information)
  - Goal: within two years
- Mobility improvements CIP vehicles/peds plan program
  - Goal: within one year
- Coordinate with developers and potential investors to add parking capacity within the SPA
  - Goal: begin within three months
- Coordinate centralized valet development (starter program) within the SPA with potential investors
  - Goal: within two years
- Coordinate centralized Shared Parking within SPA (starter program)
  - Goal: within two years
- Developing a District/SPA Owned Garage
  - Goal: within 10 years
- Obtain sufficient parking within District to meet code (bringing grandfathered lots up to current parking codes)
  - Goal: within 10 years
- Obtain sufficient parking within District to meet market demand through a SPA wide shared use concept plan (shared parking, valet, alternative transportation)
  - Goal: within 15 years



## INTRODUCTION

At the request of the Montrose Management District (MMD), Walter P Moore conducted a comprehensive parking study within the District focusing on the commercial area centered on the intersection of Montrose Boulevard and Westheimer Road. The MMD encompasses an area of diverse land uses. Located southwest of Downtown Houston, it is bound by W. Dallas to the north, Taft or Spur 527 to the east, US 59 or Bissonnet to the south, and Shepard to the west. Encompassing a 4.4 square mile area, the District is predominately residential but also includes significant retail, entertainment, and institutional land uses. A significant portion of the retail and entertainment land uses are generally centered on the intersection of Montrose and Westheimer which is the focus of the Montrose Special Parking Area application.

As shown in **Figure 1**, the study's west/east parameters are between Mandell Street and Taft Street along Westheimer Road and north/south between Hyde Park Boulevard and Harold Street along Montrose Boulevard. The proposed Special Parking Area will be divided into three sectors. Sector 1 from Mandell to Commonwealth, Sector 2 from Commonwealth to Crocker, and Sector 3 from Crocker to Taft.

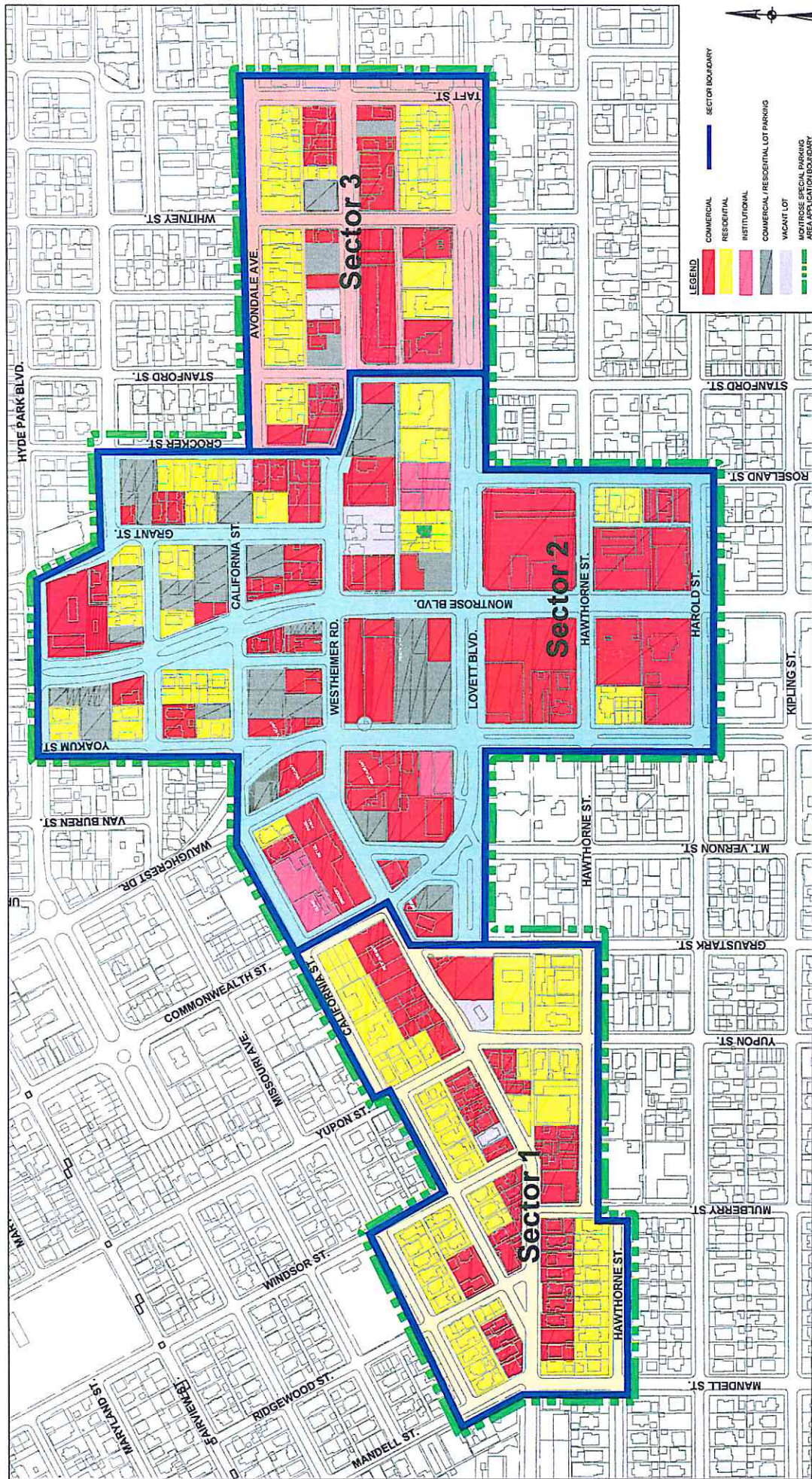
The parking study focused on the area's parking supply and demand, walking distances, and parking restrictions/regulations with the goal of submitting an application to be designated as a Special Parking Area as defined by the City of Houston's Code of Ordinances Chapter 26, Section 26-510-517.

### Sec. 26-510. Special parking areas.

The city council may designate special parking areas to accommodate parking needs in certain areas of the city. The department shall maintain a list of current special parking areas, maps and written descriptions of their boundaries, and their approved parking management plans on its website. (Ord. No. 2013-208, § 2(Exh. A), 3-6-2013)

This report presents the requirements for designation of a special parking area as listed in the Ordinance.





# MONTROSE MANAGEMENT DISTRICT SPECIAL PARKING AREA

JULY 08, 2015

FIGURE 1: MONTROSE SPA BOUNDARY

Scale: 1" = 300'-0"

Project Number: P03-13007-00

WALTER P MOORE

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## SEC. 26-511

Sec. 26-511. Application requirements for designation of a special parking area.

An application for designation of a special parking area may be filed with the department by a management entity that represents the holders of legal interests within the proposed special parking area and has a demonstrated perpetual commitment to the proposed special parking area. The application shall be in the form prescribed by the director and shall include the following:

### SEC. 26-511 PART 1

The non-refundable fee set forth for this provision in the city fee schedule.

Montrose Management District will provide the application fee.

### SEC. 26-511 PART 2

A list of the names and addresses of owners of each tract within the proposed special parking area as shown on the current appraisal district records.

**TAB ONE** provides the names and addresses of owners within the proposed special parking area.

### SEC. 26-511 PART 3

A list of the names and addresses of owners of each tract within 500 feet of the boundary of the proposed special parking area as shown on the most current appraisal district records;

**TAB TWO** provides the names and addresses of owners within 500 feet of the proposed special parking area as represented in **Figure 2**.

### SEC. 26-511 PART 4

One stamped envelope addressed to each property owner indicated on the lists provided in subsections (b) and (c) of this section;

Montrose Management District is delivering to the City stamped envelopes addressed to each owner.



Project Number: P03-13007-00

FIGURE 2: 500 FT BEYOND MONTROSE SPA BOUNDARY

Scale: 1" = 500'-0"

WALTER P MOORE

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## SEC. 26-511 PART 5

A proposed parking management plan that addresses Subsections (a) through (j).

### Sec. 26-511 Part 5 Subsection (a)

The current parking requirements for each building and tract as required by this article within the proposed special parking area as well as the anticipated parking requirements of proposed development and redevelopment within the special parking area;

The Montrose Management District is an area of diverse land uses ranging from small boutique shops to popular restaurants/bars and from small bungalow homes to large apartment complexes. This type of diversity translates to a complex, ever-evolving parking demand. The Montrose Special Parking Area boundary attempts to capture a core area of high parking demand, centered around the intersection of Westheimer and Montrose and serving as the heart of the District.

The bulk of the parking demand within the Westheimer/Montrose core is generated by popular restaurants and bars. The potential for redevelopment is also strong. Developers often brainstorm about the potential for large commercial sites to transform into mixed-use opportunities to live, work and play such as 3-acre commercial site at the southwest corner of Montrose and Westheimer. The concentration of these high parking demand generators in a small core area equate to a high peak parking demand.

Many different parking codes govern grandfathered parcels within the Montrose SPA. **Table 1** identifies the amount of parking required by code based on existing land uses within the Montrose SPA.

Table 1. Parking Required by Code Based on Existing Land Use

Address	Land Use	Area (sq ft)	Unit	Space per 1000 sqft	Space per 1000 sqft	Space per 1000 sqft	Number of Spaces
403 Westheimer	Restaurant	2,203	GSF	10.0	Space per	1000 sqft	23
404 Westheimer	Office	4,734	GSF	2.5	Space per	1000 sqft	12
416 Westheimer	Office	2,472	GSF	2.5	Space per	1000 sqft	7
420 Westheimer	Residence	4,900	GSF	0.0	Space per	1000 sqft	0
425 Westheimer	Strip Center	16,228	GSF	4.0	Space per	1000 sqft	65
500 Westheimer	Restaurant	5,022	GSF	10.0	Space per	1000 sqft	51
503 Westheimer	Bar/Restaurant	5,300	GSF	4.5	Space per	1000 sqft	23
515 Westheimer	Strip Center	13,100	GSF	4.0	Space per	1000 sqft	53
516 Westheimer	Restaurant	4,614	GSF	10.0	Space per	1000 sqft	47
528 Westheimer	Retail (massage) Veterinary Clinic	2,735	GSF	4.0	Space per	1000 sqft	15
534 Westheimer		2,800	GSF	5.0	Space per	1000 sqft	10
604 Westheimer	Retail	2,508	GSF	4.0	Space per	1000 sqft	11
607 Westheimer	Residence (Women's Home)	9,624	GSF	0.0	Space per	1000 sqft	0
608 Westheimer	Retail	4,618	GSF	4.0	Space per	1000 sqft	19
616 Westheimer	Restaurant	8,425	GSF	10.0	Space per	1000 sqft	85
802 Westheimer	Office	2,641	GSF	2.5	Space per	1000 sqft	7
811 Westheimer	Retail	22,581	GSF	4.0	Space per	1000 sqft	91
812 Westheimer	Restaurant	8,736	GSF	10.0	Space per	1000 sqft	88
904 Westheimer	Restaurant	6,953	GSF	10.0	Space per	1000 sqft	70
912 Westheimer	Restaurant	2,884	GSF	10.0	Space per	1000 sqft	29
913 Westheimer	Restaurant (Smoothie King)	966	GSF	4.0	Space per	1000 sqft	4
926 Westheimer	Gas Station (8 bays)	2,791	GSF	1.0	Space per bay		8
1001 Westheimer	Strip Center	44,674	GSF	4.0	Space per	1000 sqft	179
1002 Westheimer	Restaurant (Burger King)	3,739	GSF	4.0	Space per	1000 sqft	15
1018 Westheimer	Restaurant	1,470	GSF	10.0	Space per	1000 sqft	15

1038 Westheimer	Restaurant	6,482	GSF	10.0	Space per	1000 sqft	65
1100 Westheimer	Restaurant	9,928	GSF	10.0	Space per	1000 sqft	100
1111 Westheimer	Restaurant	22,125	GSF	10.0	Space per	1000 sqft	222
1200 Westheimer	Pool Hall (Bar)	8,651	GSF	14.0	Space per	1000 sqft	122
1203 Westheimer	Retail	4,200	GSF	4.0	Space per	1000 sqft	17
1207 Westheimer	Beauty Salon	240	GSF	8.0	Space per	1000 sqft	2
1212 Westheimer	Strip Center	18,474	GSF	10.0	Space per	1000 sqft	74
1225 Westheimer	Restaurant	1,519	GSF	9.0	Space per	1000 sqft	14
1302 Westheimer	Restaurant (McDonalds)	4,125	GSF	4.0	Space per	1000 sqft	17
1303 Westheimer	Restaurant	2,770	GSF	10.0	Space per	1000 sqft	28
1318 Westheimer	Restaurant	5,736	GSF	10.0	Space per	1000 sqft	58
1330 Westheimer	Office	3,702	GSF	2.5	Space per	1000 sqft	10
1340 Westheimer	Strip Center	6,336	GSF	4.0	Space per	1000 sqft	26
1401 Westheimer	Retail (tattoo)	1,515	GSF	10.0	Space per	1000 sqft	7
1402 Westheimer	Restaurant	1,280	GSF	10.0	Space per	1000 sqft	12
1412 Westheimer	Retail	1,651	GSF	4.0	Space per	1000 sqft	7
1416 Westheimer	Retail	2,346	GSF	4.0	Space per	1000 sqft	6
1424 Westheimer	Bar	4,000	GSF	12.0	Space per	1000 sqft	48
1431 Westheimer	Vacant	11,839	GSF	0.0	Space per	1000 sqft	0
1435 Westheimer	Retail	8,600	GSF	4.0	Space per	1000 sqft	35
1512 Westheimer	Retail	1,656	GSF	4.0	Space per	1000 sqft	7
1513 Westheimer	Restaurant	3,400	GSF	9.0	Space per	1000 sqft	31
1521 Westheimer	Restaurant	2,791	GSF	9.0	Space per	1000 sqft	26
1525 Westheimer	Restaurant	1,626	GSF	9.0	Space per	1000 sqft	15
1533 Westheimer	Retail (tattoo)	3,479	GSF	4.0	Space per	1000 sqft	14
1540 Westheimer	Retail	3,800	GSF	4.0	Space per	1000 sqft	16
1544 Westheimer	Retail	2,940	GSF	4.0	Space per	1000 sqft	12
1550 Westheimer	Retail	1,602	GSF	4.0	Space per	1000 sqft	7
1600 Westheimer	Restaurant	5,860	GSF	10.0	Space per	1000 sqft	59

2503 Montrose	Retail (Hollywood Food Store)	3,816	GSF	4.0	Space per	1000 sqft	16
2520 Montrose	Niko Nikos Restaurant	4,960	GSF	10.0	Space per	1000 sqft	50
2615 Montrose	Office	1,634	GSF	10.0	Space per	1000 sqft	17
2703 Montrose	Restaurant	920	GSF	8.0	Space per	1000 sqft	8
2710 Montrose	Restaurant	836	GSF	8.0	Space per	1000 sqft	7
2710 Montrose	Retail Cleaners	1,000	GSF	4.0	Space per	1000 sqft	4
3205 Montrose	Retail	5,624	GSF	4.0	Space per	1000 sqft	23
3209 Montrose	Office	5,416	GSF	2.5	Space per	1000 sqft	14
3217 Montrose	Office	16,500	GSF	2.5	Space per	1000 sqft	42
3220 Montrose	Restaurant (Jack in the Box)	4,078	GSF	4.0	Space per	1000 sqft	10
3300 Montrose	Supermarket	42,929	GSF	6.0	Space per	1000 sqft	236
3317 Montrose	Retail (Walgreens)	20,108	GSF	4.0	Space per	1000 sqft	81
3400 Montrose	Office	183,816	GSF	2.5	Space per	1000 sqft	460
3407 Montrose	Strip Center (Starbucks/Berryhills)	16,700	GSF	4.0	Space per	1000 sqft	134
3410 Montrose	Restaurant	12,648	GSF	8.0	Space per	1000 sqft	104
1006 Missouri	Dentist Office	1,969	GSF	4.5	Space per	1000 sqft	9
2607 Grant	Restaurant (Baba Yega)	410	GSF	10.0	Space per	1000 sqft	35
2607 Grant	Restaurant (Baba Yega) Clinic (Legacy Community Health)	2,152	GSF	10.0	Space per	1000 sqft	22
1415 California		40,000	GSF	4.5	Space per	1000 sqft	180
804 Pacific	Restaurant	3,368	GSF	10.0	Space per	1000 sqft	34
805 Pacific	Bar	2,809	GSF	14.0	Space per	1000 sqft	40
808 Pacific	Restaurant	6,064	GSF	10.0	Space per	1000 sqft	61
810 Pacific	Bar	9,911	GSF	14.0	Space per	1000 sqft	139
903 Harold	Bar (Griffs)	2,400	GSF	14.0	Space per	1000 sqft	34
1110 Lovett	Office	14,869	GSF	2.5	Space per	1000 sqft	38
1203 Lovett	Retail (Charity Guild Resale shop)	38,285	GSF	4.0	Space per	1000 sqft	154
<b>Total Existing Requirement</b>		<b>788,600</b>					<b>3,936</b>

\*Residential land uses is typically not included in parking demand calculations. This is due to the fact that residential land uses are historically land generators which provide parking on-site that is not shared or capable of being shared.



Walter P Moore compared the parking required by code (calculated in **Table 1**) with the current parking supply within the Montrose SPA. **Table 2** illustrates the Montrose SPA's parking deficit, that is related to the fact that many of the Montrose SPA land uses have been grandfathered since they were built under different parking codes or when no parking codes were in effect. **and with a 20% transit/pedestrian mobility factor (20% is typical for the Montrose SPA area).**

**Table 2. Comparison of Parking Supply vs. Parking Demand**

Est. Off-Street Parking Supply	2,081	Transit/Pedestrian Mobility Reduction of 20%
Requirement based on COH Parking Codes (March 2013)	3,936	3,149
<b>DELTA based on current parking code requirements. SPA's parking requirements differ.</b>	-1,855	-1,068

**Table 3** compares the effective parking ratios that result from various supply, requirements, and demands. The effective parking ratio is defined as the number of off-street (on-site) parking spaces divided by total square footage and should correlate to code required spaces.

**Table 3. Effective Parking Ratios within Montrose SPA**

Effective Parking Ratio (spaces/1,000 SF)	
Based on Actual Conditions	2.73
Based on Code Requirements	3.83
Based on Market Demand	6.10

Three ratios were calculated:

- Based on Actual Conditions:
  - This calculation is the total parking supply divided by the parking demand calculated based on land use. This calculation represents the current conditions within the Special Parking Area.
- Based on Code Requirements (COH March 2013 Parking Code):
  - This calculation is the total parking supply which would be required by COH parking code of ordinances divided by the parking demand calculated based on land use.

The total parking supply is assumed to be the off-street parking required by the City of Houston if each land use were to request a development permit in July 2015.

This calculation serves as a baseline for parking supply based on COH Code Requirements.

- Based on Market Demand:
  - This calculation is the total parking supply which would be required based on Best Practices or Market Driven demand divided by the parking demand calculated based on land use. Market demand driven ratios are typically higher than that required by COH Parking Code requirements.

As the application area evolves, mode adjustments and adjustments to the base parking ratios based on local transportation characteristics, should be made. As sidewalks, cycle paths, transit frequencies, and transit reliability improve, pedestrian, transit, and cycling preferences will emerge for short trips, relieving some of the pressure on the transportation network and parking infrastructure. For the purpose of this application and calculations, a modal split, which is defined as the percentage of persons arriving at a destination in different modes of transportation, of 20% was assumed for the context of the Montrose SPA. Jeremy, I am not sure we need this discussion of mode split; does parking code allow this reduction? An effectively managed Special Parking Area can help address and mitigate some of the perceived parking deficiencies while preserving the unique character of the area.

Sec. 26-511 Part 5 Subsection (b)

Existing parking restrictions such as hours of permitted parking and restrictions relating to use;

Figure 3 identifies the existing parking restrictions such as hours of permitted parking and restrictions relating to use.

Sec. 26-511 Part 5 Subsection (c)

Existing and proposed public and private parking facilities;

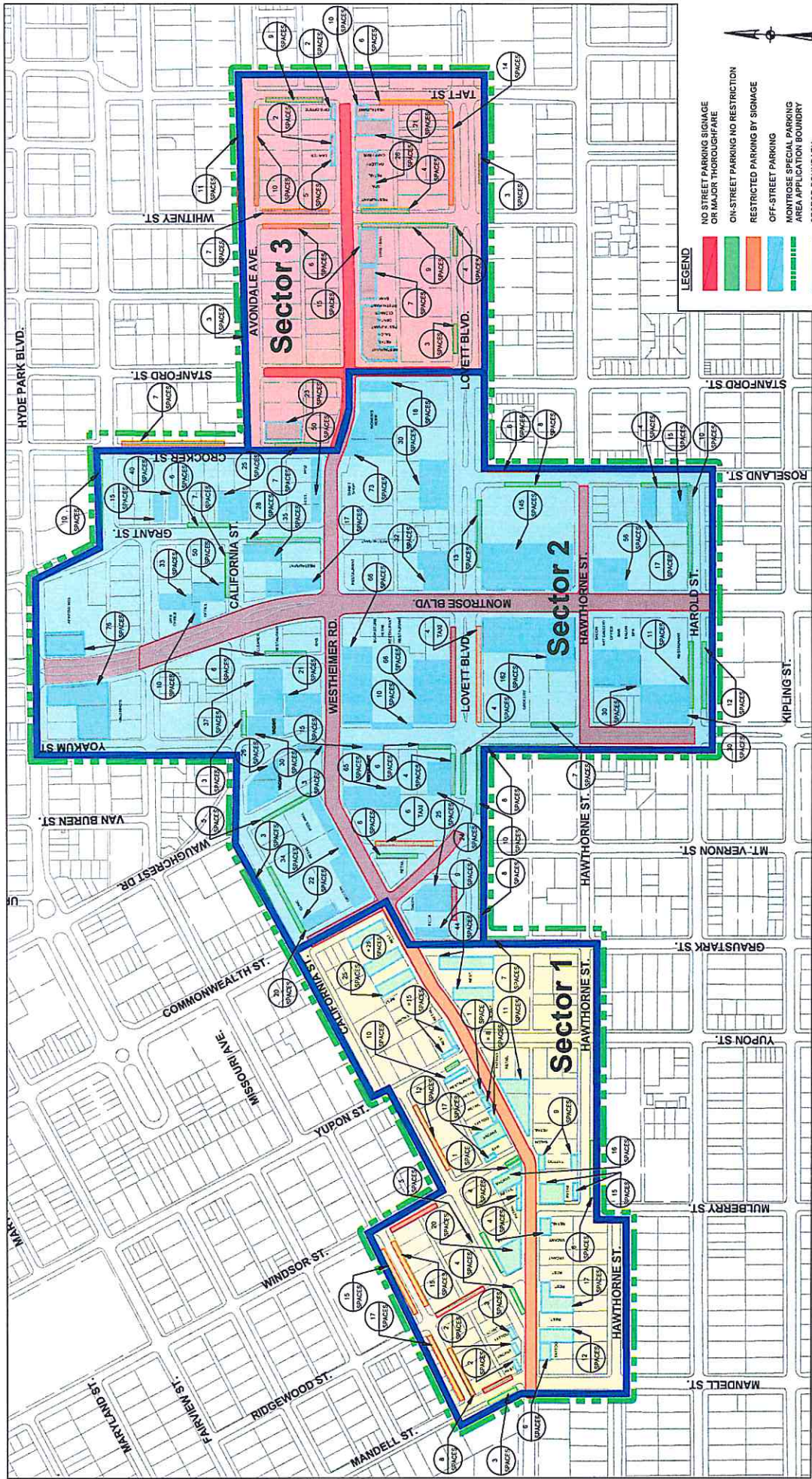
Figure 3 identifies the existing and proposed public and private parking facilities.

The parking facilities within the application area are generally self-contained, designated for individual parcel use, and are not typically shared. The rare instances where there is sharing of land for parking is due to a financial agreement between the land owners. There are no public structured facilities within the application area. The Montrose SPA does currently have sections of metered on-

street parking that are at or near capacity during peak parking demand. The metered parking supply is an ever changing variable that makes it hard to predict exact quantities for future use. As the application area evolves and continues to add development, additional parking facilities will be required. The MMD's plan is to create parking facilities that will result in a reduction/removal of overflow parking on residential streets.

DRAFT





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Project Number: P03-13007-00

**FIGURE 3: EXISTING PARKING ALLOCATION**

Scale: 1" = 300.0'

**MONTROSE MANAGEMENT DISTRICT  
SPECIAL PARKING AREA**

JULY 08, 2015

TOTAL SPACES ENTIRE SITE	
ON-STREET PARKING	789
OFF-STREET PARKING	3117
<b>TOTAL SPACES</b>	<b>3907</b>

Valet parking within the Montrose SPA includes the following:

**La Colombe d'Or**

3410 Montrose Blvd

Valet Parking offered at:

Lunch 11:00 a.m. – 2:00 p.m.

Dinner 6:00 p.m. – 9:00 p.m.

Valets park on lot behind La Colombe d'Or.

**Sorrento Ristorante Italiano**

415 Westheimer

Valet Parking offered at:

Dinner 4:00 p.m. – 10:00 p.m.

Valets park on lot in front of restaurant (strip center).

**Indika**

516 Westheimer

Valet Parking offered at:

Dinner 6:00 p.m. – 10:30 p.m.

Valets park on restaurant lot.

**Underbelly / Hay Merchant**

1100 Westheimer

Valet Parking offered at:

Dinner 5:00 p.m. – 11:00 p.m.

Valets park on the lot behind the restaurant and also utilize lot behind Blacksmith's which closes at 5:00 p.m.

**Royal Oak Grill**

1318 Westheimer

Valet Parking offered at:

Dinner 4:00 a.m. – 2:00 a.m.

Valets park on restaurant lot.

**Da Marco Restaurant**

1520 Westheimer

Valet Parking offered at:

Dinner 5:30 – 10:00 p.m.

Valets park on restaurant lot.

**Hugo's**

1600 Westheimer

Valet Parking offered at:

Lunch/Dinner 11:00 a.m. – 11:00 p.m.

Valets utilize lot behind restaurant.



Sec. 26-511 Part 5 Subsection (d)

Existing and proposed transit facilities or other alternative modes of transportation, including, but not limited to:

- [1] Existing and proposed METRO rail stations and fixed-route bus stops;
- [2] Existing and proposed bicycle lanes, bicycle routes, shared-use paths, and pedestrian trails;
- [3] Existing and proposed bicycle spaces and bicycle facilities;
- [4] Existing and proposed taxi-cab stands;
- [5] Existing and proposed services for shuttle, trolley, park and ride, jitney, and similar services; and
- [6] A transit ridership summary that details the extent of usage of the existing transit facilities or modes, the number of vehicles that proposed transit facilities or modes will replace, and other information or evidence that current and future parking facilities will satisfy demand for parking within the boundaries of the proposed special parking area on a permanent basis;

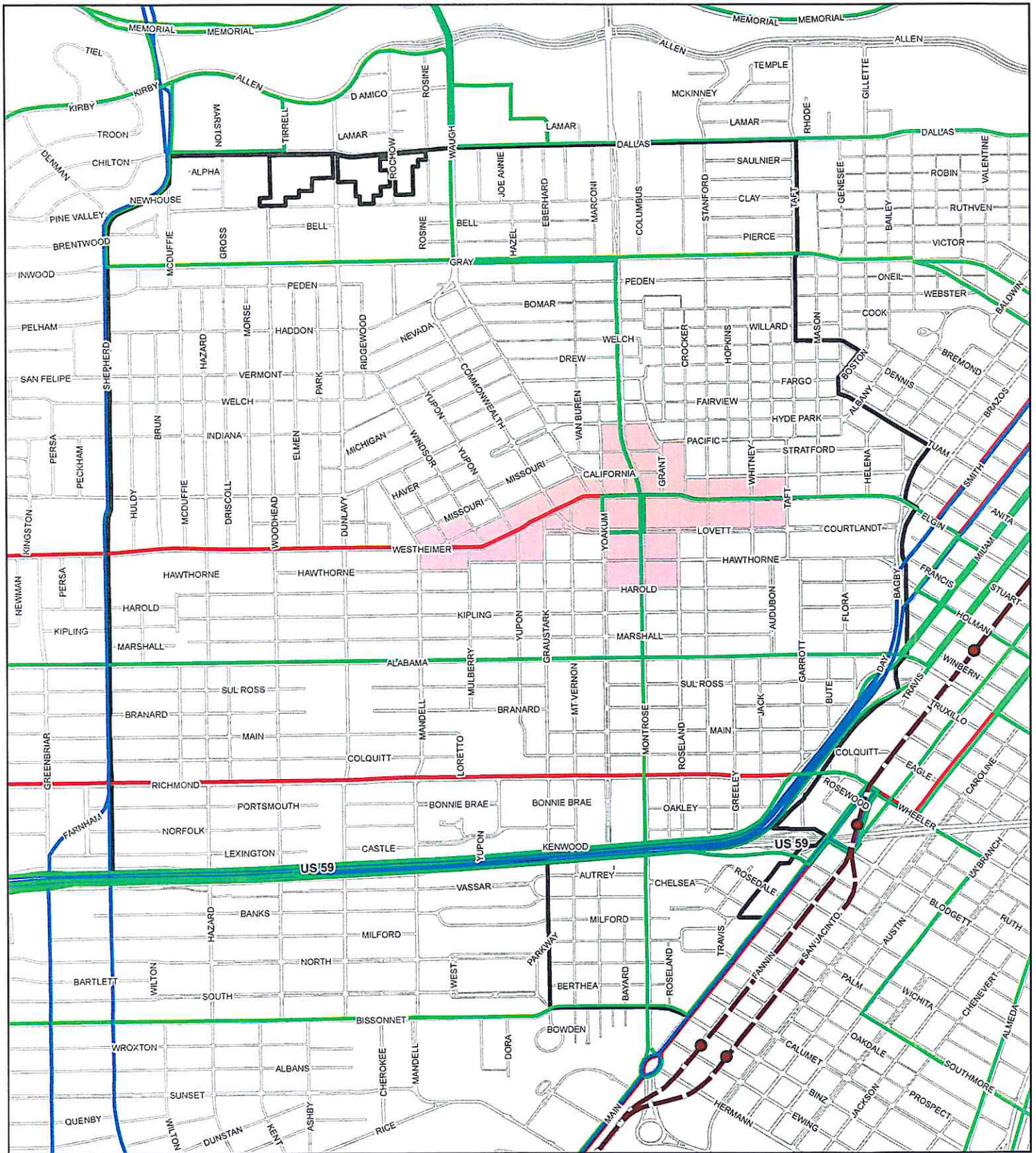
**Figure 4** identifies the boardings and alightings at METRO transit stops within the Montrose SPA based on data available from February 19, 2014. **Figure 5** identifies the existing METRO transit routes as of July 2015. **Figure 6** depicts the new METRO transit routes and frequencies that will take effect in August 2015, providing more predictable and frequent headways on major roadways across Houston.

**Figure 7** identifies bike infrastructure within the Montrose Management District. B-Cycle stations are also highlighted as well as bike storage. MMD is currently evaluating bike infrastructure throughout the District and coordinating with the update to the City of Houston Bike Plan. Improvements coming include revised bike lane striping along Waugh and Commonwealth to provide wider bike lanes; additional route and wayfinding signage including distance markers to popular destinations such as museums, business districts and parks; and better visibility through enhanced signage and striping at intersections and boundary conditions such as near Spur 527 at Hawthorne/Bagby/Smith/Holman intersection. These efforts are part of an overall objective to improve mobility within the MMD for vehicles, cyclists and pedestrians.









## MONTROSE MANAGEMENT DISTRICT

FIGURE 5. METRO ROUTES (JULY 2015)

### Local Routes

10 to 15 minute headway

16 to 30 minute headway

30+ minute headway

METRO RAIL

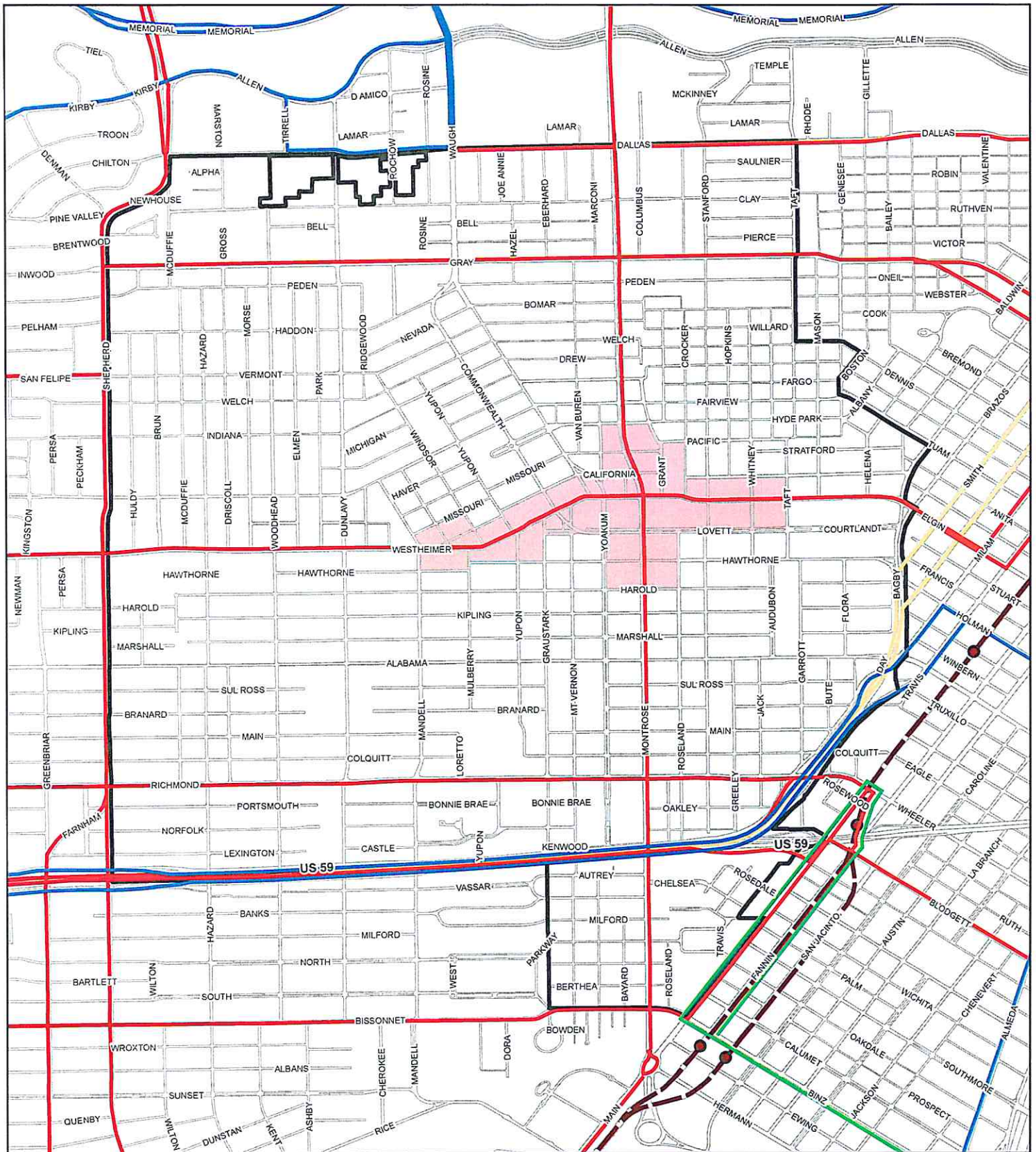
METRO Rail Stations

Proposed Special Parking Area



WALTER P MOORE

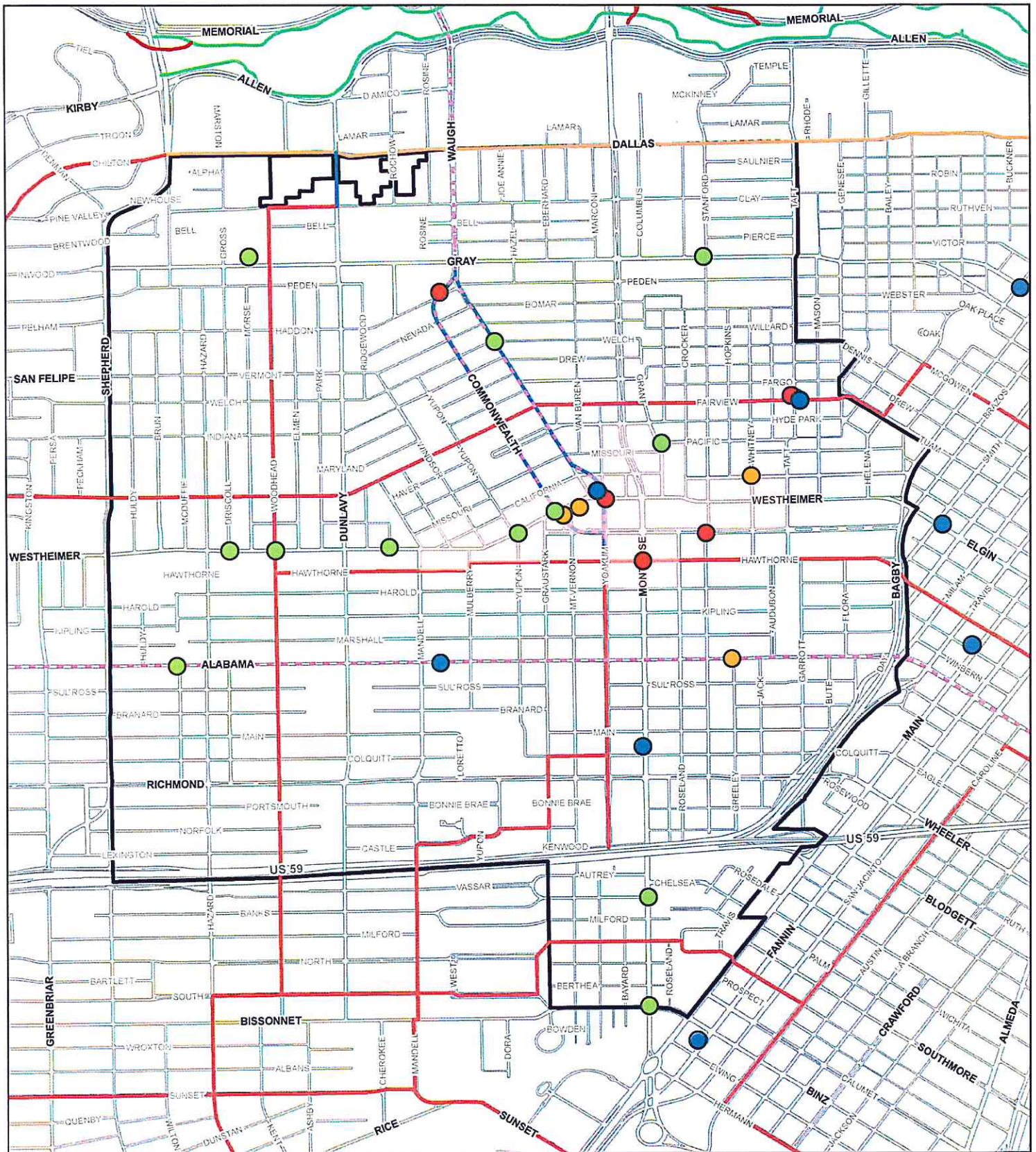




**MONTROSE MANAGEMENT DISTRICT**  
**FIGURE 6. METRO ROUTES (AUGUST 2015)**

- |                          |                                 |
|--------------------------|---------------------------------|
| <b>Local Routes</b>      | <b>Metro Rail</b>               |
| — 10 - 15 minute headway | —                               |
| — 30 minute headway      | ● METRO Rail Stations           |
| — 60 minute headway      | ■ Proposed Special Parking Area |
| — Peak Only Service      |                                 |





## MONTROSE MANAGEMENT DISTRICT

FIGURE 7. BICYCLE INFRASTRUCTURE

- Signed Bike Route
- Shared-Use Path
- Bike Lane
- Signed Shared Roadway
- Other Paths
- - - Future On Street
- Proposed Special Parking Area
- Bike Houston Sites
- B-Cycle Locations
- Completed Waiver
- Installed or to be Installed





**Figure 8.** Montrose Management District Bike Storage and B Cycle Station Example

Currently, the application area has limited formal taxi service areas and is generally served by patrons calling individual taxi cab or shuttle service companies. **Figure 3** shows the one designated taxi area located along Mt Vernon south of Westheimer, where approximately 6 spaces are available.

#### Sec. 26-511 Part 5 Subsection (e)

The approximate number of vehicular trips generated by the existing use classifications within the proposed special parking area and the average vehicle occupancy;

The approximate number of vehicular trips generated by the existing use classifications within the proposed Special Parking Area was estimated using standard Institute of Transportation Engineers Trip Generation rates. **Table 4** shows a conservative total of vehicular trips generated within the proposed Montrose SPA with no reductions assumed for shared trips (or one vehicle stopping at multiple locations on the same "trip").

**Table 4. Vehicle Trips Generated within Montrose SPA**

(Estimated based on Individual Land Uses with no allowance for reduction based on internal trip capture or one vehicle stopping at multiple locations on same "trip")

General Land Use	ITE Code	Trip Generation Land Use	Size	Unit	Weekday			AM Peak Hour			PM Peak Hour		
					Average Rate	Total	Enter	Exit	Average Rate	Total	Enter	Exit	Total
Large Restaurant	931	Quality Restaurant	95,498	square feet	89.95	8,590	4,295	4,295	0.81	762	n/a	n/a	715
Take Out Restaurant	933	Fast-Food Restaurant without Drive-through window	12,790	square feet	716.00	9,158	4,579	4,579	43.87	561	33	224	334
Neighborhood Restaurant	932	High-Turnover Sit-Down Restaurant	4,000	square feet	127.15	509	255	255	10.81	43	24	23	39
Bar	925	Drinking Place	18,951	square feet	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	215
Retail	826	Specialty Retail Center	65,982	square feet	44.32	2,924	1,462	1,462	n/a	n/a	n/a	n/a	179
Grocery Store	850	Supermarket	42,168	square feet	102.2	4,312	2,156	2,156	3.40	143	89	54	400
Beauty Salon/Barber	918	Hair Salon	2,400	square feet	n/a	n/a	n/a	n/a	1.45	3	3	0	3
Shopping Center	820	Shopping Center	66,364	square feet	42.70	2,834	1,417	1,417	0.96	64	40	24	246
Office	710	General Office Building	19,302	square feet	0.03	213	107	107	1.56	30	26	4	29
Clinic	630	Clinic	1,000	square feet	3.5	1,258	629	629	n/a	n/a	n/a	n/a	207
Vet Office	640	Animal Hospital/Veterinary Clinic	2,000	square feet	n/a	n/a	n/a	n/a	4.08	8	6	2	9
Health Club/Spa	492	Health/Fitness Club	3,735	square feet	32.93	123	62	62	1.41	5	3	3	13
Service Station	945	Gasoline/Service Station with Convenience Market		pump	162.78	1,302	651	651	10.16	81	41	41	108
		<b>TOTAL</b>				<b>31,222</b>	<b>15,611</b>	<b>15,611</b>		<b>1,015</b>	<b>567</b>	<b>371</b>	<b>2,497</b>

**Data from Trip Generation 8th edition**

\* Where applicable Peak Hour is that of the Adjacent Street, not the Generator

**Sec. 26-511 Part 5 Subsection (f)**

**An analysis of the parking supply and demand within the proposed special parking area, including peak demand hours;**

The current program and land use of the Montrose SPA experiences a peak hour demand at 7 PM when the restaurants and the bars peak. **Figure 3** identifies parking supply within the proposed Montrose SPA. Discussion of supply versus demand was presented earlier and focused on individual tracts within the Special Parking Area. The purpose of the supply and demand analysis is to determine the current and future amount of parking spaces in relation to demand. The analysis is a tool used to determine if the number of available parking spaces is adequate to serve a particular land use, given factors such as price of parking and the availability of transit, cycling, and walking. The Montrose SPA has developed and redeveloped over time and has a multitude of governing parking codes as many parcels within the application area are grandfathered. This further complicates the parking situation as many grandfathered parcels are not obligated to provide current required parking spaces.

The Montrose SPA encompasses a dynamic ever-evolving core area within the District. The District anticipates a 25% growth in development and demand within the near future.

**Sec. 26-511 Part 5 Subsection (g)**

**The approximate number of people employed within the proposed special parking area;**

According to information gathered by ESRI Business Analyst (2012), there are currently 832 people employed within the Montrose SPA.

The Montrose SPA roughly represents the commercial hub of the Montrose Management District surrounded by residential neighborhoods and other developments. The proximity to Midtown, Downtown, Greenway Plaza, the Texas Medical Center, museums, Upper Kirby, West University, River Oaks, and Uptown contributes to the constant influx of patrons visiting the local bars and restaurants. As the District explores and encourages more office development, the application area will begin to benefit more from shared parking as office parking can be utilized for other purposes during off-peak times for the office.

Sec. 26-511 Part 5 Subsection (h)

The approximate number of people who reside within the proposed special parking area;

According to information gathered by ESRI Business Analyst (2012), there are 459 people residing within the Montrose SPA.

Sec. 26-511 Part 5 Subsection (i)

Proposed and existing mitigation measures designed to prevent spillover parking into adjacent properties and residential neighborhoods; and

Several streets near or within the Montrose SPA require Residential Permits for on-street parking between the hours of 6:00 p.m. and 12:00 a.m.:

- 1600 block of California
- 1700-1800 blocks of Missouri Street (Seeking to extend the hours on Sat / Sun)
- 400 Block of Lovett Blvd
- 400/100 Block of Avondale

The adjacent Super Neighborhood 24 (Neartown/Montrose) has two pending Residential Permits

We asked COH Planning for an update on 7/7/2015:

- 800 Block of Drew
- 2400 Block of Morgan



Sec. 26-511 Part 5 Subsection (j)

The proposed shared parking plan, alternative parking regulations, and substituted requirements for the number of parking spaces, bicycle spaces, or loading berths, as applicable, for the special parking area with a justification for each; and

**SEC. 26-511 PART 6**

A map illustrating the boundaries of the proposed special parking area and showing the boundaries of each individual property within the proposed special parking area.

**Figure ES1** provides a map illustrating the boundaries of the proposed Montrose Special Parking Area (SPA) and the boundaries of each individual property within the proposed special parking area.

**Suggest Striking this section** The proposed Special Parking Area within the Montrose Management District has developed and redeveloped over several decades. For this reason, there is a diversity of parking issues ranging from:

- Spillover parking from businesses into neighborhoods (day and night)
- Parking in areas used by pedestrians
- Insufficient parking at some retail and entertainment venues
- Insufficient street and/or right-of-way (ROW) width for parking and traffic movement needs
- Parcels being grandfathered into older parking requirements or built prior to City of Houston Parking Ordinances
- Restricted parking for specific parcels
- No shared parking program
- No on-street parking along Westheimer and Montrose

The Montrose Special Parking Area focuses on one primary alternative parking regulation. Currently, Section 26-499 Off-site parking code states: **is this current number?**

A parking space required by this article may be provided on off-site parking facilities if the following conditions are met:

- (1) The off-site parking facilities are located less than 250 feet from the tract where the use classification is located except as provided for in items (2) and (3) of this subsection;

- (2) Up to 25 percent of the required number of parking spaces may be provided on off-site parking facilities located:
- a. Less than 800 feet from a tract where the use classification is located if the building for which the off-site parking is being provided contains less than 30,000 square feet of GFA; or
  - b. Less than 1,000 feet from a tract where the use classification is located if:
    - o The building for which the off-site parking is being provided contains less than 30,000 square feet of GFA; and
    - o The director determines in his or her sole professional judgment that sufficient pedestrian amenities mitigate the impact of the extended distance of the off-site parking facilities.
- (3) Up to 75 percent of the required number of parking spaces for a freestanding class 7 use under section 26-492 of this Code may be provided on off-site parking facilities located up to 1,000 feet from a tract where the use classification is located if:
- a. The off-site parking facilities are used only for valet parking services in accordance with this chapter;
  - b. Valet parking services for the off-site parking facilities must be available during all operating hours of the use classification;
  - c. 25 percent or more of the parking spaces required by this article are located either on-site or on off-site parking facilities located within 250 feet of the tract where the use classification is located; and
  - d. The applicant or responsible party submits an annual certification of valet parking in accordance with the requirements of section 26-502 of this Code.
- (4) The off-site parking spaces required by this article are not already being used to satisfy the parking requirement of a different building or tract.

In the proposed Montrose SPA, it is requested that **100% of the required off-street parking be allowed to be provided in parking facilities within proposed development's Sector or adjacent Sector with goal of 1,320 foot maximum walking distance.**



As defined above the proposed Special Parking Area will be divided into three Sectors:

- Sector 1: Mandell to Commonwealth (max walking distance approximately 1,685 feet)
- Sector 2: Commonwealth to Crocker (max walking distance approximately 1,400 feet)
- Sector 3: Crocker to Taft (max walking distance approximately 1,300 feet)

The max approximate walking distance within each sector is within a few hundred feet from the measured maximum walking distance of 1,320 feet defined by the City of Houston's Transit Corridor Ordinance.

By dividing the proposed Special Parking Area into three Sectors it is our plan to allow developments to utilize parking facilities within their respective Sector and adjacent Sector to meet their City of Houston's Code of Ordinances Chapter 26, Section 26-511. That is to say that a development in Sector 1 can utilize available parking facilities with Sector 1 or Sector 2. Developments within Sector 2 can utilize parking facilities within all three Sectors, but Sector 1 cannot utilize parking facilities with Sector 3 and vice versa. However with an approximate walking distance of 3,000 feet between the two Sectors operationally this makes sense.

Due to the mixed use nature of the proposed Special Parking Area we have further defined the land use classifications with the proposed Special Parking Area to define any specific proposed parking ordinance changes:

- Class 1: Office – utilize parking within its Sector or adjacent Sector
- Class 2: Residential – follow City of Houston's Code of Ordinance Chapter 26
- Class 3: Healthcare Facilities - utilize parking within its Sector or adjacent Sector
- Class 4: Industrial and Commercial Manufacturing - utilize parking within its Sector or adjacent Sector
- Class 5: Religious and Educational Facilities - utilize parking within its Sector or adjacent Sector
- Class 6: Recreation and Entertainment Facilities - utilize parking within its Sector or adjacent Sector

- Class 7: Food and Beverage - utilize parking within its Sector or adjacent Sector
- Class 8: Retail Services - utilize parking within its Sector or adjacent Sector
- Class 9: Automobiles - follow City of Houston's Code of Ordinance Chapter 26

This increase in allowable walking distance benefits the evolution of a management plan for the Montrose SPA as it will allow the MMD to:

- Advance conversations already in progress with developers to potentially provide additional parking within the District than their development requirements and share with adjacent or other properties,
- Increase area for centralized parking,
- Increase opportunity for shared parking among land owners,
- Allows for developers to "contribute" to centralized parking rather than providing full parking on site,
- Potential to reduce effective parking ratios,
- Reduce parking spillover into neighborhoods, and
- Maximize use of underdeveloped land within the District.

## PLAN IMPLEMENTATION

The Montrose Management District is seeking to increase the allowable walking distances with the proposed boundaries of the Special Parking Area. Specifically the District is requesting that **100% of the required off-street parking be allowed to be provided in parking facilities within proposed development's Sector or adjacent Sector with goal of 1,320 foot maximum walking distance.** The Montrose Management District is prepared to take on the responsibility of implementing the provisions of the proposed parking management plan within the Special Parking Area. The District has taken or will take the following steps to manage the responsibility of implementing the Special Parking Area application guidelines:

- 1) Set-up direct communications with City of Houston's Parking Management Division. This open dialogue will provide notifications from the PMD on changes to on-street parking

restrictions and Residential Parking Permit applications within or surrounding the proposed Special Parking Area. This will allow the continuance of the Montrose Management District's desire to protect its surrounding neighborhoods.

- 2) The Montrose Management District has performed an inventory of sidewalks, ramps, signage, and pavement conditions within the Special Parking Area. As the Special Parking Area evolves and centralized parking is realized within the boundaries, the Management District has a tool already in place to strategically focus on improvements within the Special Parking Area. Part of the implementation of the Special Parking Area will be to create a more user and pedestrian friendly area within the Montrose District.
- 3) The Special Parking Area will act as a catalyst for the Montrose Management District to continue their discussions with area developers to encourage additional parking within the boundaries to be utilized for shared parking. As more developers support centralized parking, the District's hope is to see Centralized Garages as a means of alleviating parking deficiencies within the Special Parking Area. Garages are long term solutions to the current parking issues and act a benefit to both commercial and residential interests.
- 4) Through the Special Parking Area the Montrose Management District looks to expand on its current signage branding efforts. The Montrose Management District is currently in final stages of adding signature signage and lighting throughout the District. This wayfinding would be expanded within the Special Parking Area to identify areas of centralized parking.
- 5) The Special Parking Area would empower the Montrose Management District to manage or facilitate parking within the Special Parking Area boundaries. The Management District would contract with a provider such as Walter P Moore to facilitate, manage and control parking counts/shared parking spaces within the Special Parking Area.
- 6) The Montrose Management District will submit a review of the parking management plan to the City of Houston Planning Commission every two years after the designation of the Special Parking Area. This will ensure that all concerned and stakeholders are up-to-date on the activities within the Special Parking Area. This review will keep the plan fluid and flexible as the Montrose area continues to evolve.

The MMD plans to utilize the Special Parking Area designation as a tool for organizing and developing parking solutions to further develop the District while being mindful of neighboring land

uses. The District has developed milestones to track and measure the Special Parking Area's goals and objectives. The milestone timeline begins upon approval of Montrose SPA application by City of Houston Planning Commission and City Council:

- Confirm Parking supply with the SPA
  - Goal: two weeks
- Engage the surrounding Home Owner's Associations in regards to the SPA's role in the Residential Permit process
  - Goal: one month
- Customer satisfaction surveys – annually, will focus in terms of experience, location of parking, availability, walking distance, wayfinding
  - Goal: one year
  - Implementation: metric of walking distance (remain within Sectors or maximum of 1,320 feet)
- Gather information on inventory of Shared Parking Agreements within the SPA and begin tracking
  - Goal: one year
- Gather information on inventory of Valet Parking Operations within the SPA
  - Goal: two months
- Gather information on inventory of Parking Rates within the SPA
  - Goal: one month
- Continue conversation with inventory owners and Developers about Shared Parking leveraging SPA as a tool
  - Goal: on-going
- Community Meeting to discuss SPA with area Community Organization, stakeholders, residents
  - Goal: six months
- Reconfirm and enhance Walter P Moore's audit of infrastructure within the SPA (roadways, sidewalks)
  - Goal: within one year

- Develop a bikeway/pedestrian plan for the SPA, leverage the COH bike plan as a baseline. Personalize it for the SPA
- Goal: within one year
- Investigate alternative modes of transportation within the SPA (jitney, electronic taxi, rickshaw)
  - Goal: two years
- SPA specific wayfinding / navigation system (signage, app, parking, District information)
  - Goal: within two years
- Mobility improvements CIP vehicles/peds plan program
  - Goal: within one year
- Coordinate with developers and potential investors to add parking capacity within the SPA
  - Goal: begin within three months
- Coordinate centralized valet development (starter program) within the SPA with potential investors
  - Goal: within two years
- Coordinate centralized Shared Parking within SPA (starter program)
  - Goal: within two years
- Developing a District/SPA Owned Garage
  - Goal: within 10 years
- Obtain sufficient parking within District to meet code (bringing grandfathered lots up to current parking codes)
  - Goal: within 10 years
- Obtain sufficient parking within District to meet market demand through a SPA wide shared use concept plan (shared parking, valet, alternative transportation)
  - Goal: within 10 years

The District understands that upon not submitting a review for the parking management plan within three years of the designation of the Special Parking Area or the last review for the parking management plan, the provisions of the parking management plan shall not apply within the Special Parking Area and the building official shall issue a building permit or a certificate of occupancy for buildings or tracts that comply with the provisions of this article without reference to the parking management plan.

DRAFT

TAB ONE

Property Owners within the Montrose Special Parking Area

TAB TWO

Property Owners within 500 feet of the Montrose Special Parking Area Boundary



MONTROSE MANAGEMENT DISTRICT  
CITY OF HOUSTON  
HARRIS COUNTY, TEXAS

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AGENDA MEMORANDUM

TO: Montrose Management District Board of Directors  
FROM: Executive Director  
SUBJECT: Agenda Item Materials

---

9. Receive reports.

b. Mobility and Visual Improvement

iv. Consider a proposal to remove the Montrose gateway monument at  
Westheimer and Bagby Streets

Item 9biv Staff Report

**Title: Consider proposal to remove the Montrose gateway monument at Westheimer and Bagby Streets**

Summary: Staff requests approval of a proposal by Kaflogis Construction, Inc. to remove the Montrose gateway monument located at the intersection of Westheimer and Bagby Streets for a cost of \$1,500.

The masonry shell and steel frame monument featuring a stylized "M" was dedicated in 1997 and constructed through the support of Frost Bank, the Neartown Association, and the Museum District Business Alliance. The monument stood as a recognizable feature announcing entry into the Montrose neighborhood at one of its most prominent gateways.

The proposal for removal of the monument includes demolition of the structure and salvage of the "M" and dedication plaque. The concrete base will also be removed and replaced with a topcoat of asphalt until such time as more aesthetic treatment of the esplanade is planned.

A new, branded Montrose marker at this location is proposed as part of the first phase of gateway signage for the District. The new sign is proposed to be located outside of the roadway, as opposed to within the esplanade.

The proposal for removal of the original monument is included as an attachment.

**Requested staff: Approval of a proposal by Kaflogis Construction, Inc. to remove the Montrose gateway monument located at the intersection of Westheimer and Bagby Streets for a cost of \$1,500.**

**Kafoglis Construction, Inc.**

PO Box 66549  
Houston, TX 77266  
(713)489-4660  
stathis@kafoglis.com



# ESTIMATE

**ADDRESS**

Montrose Management District

ESTIMATE # 1008

DATE 06/23/2015

EXPIRATION DATE 07/31/2015

ACTIVITY	QTY	RATE	AMOUNT
Monument Removal - includes waste handling	1	650.00	650.00
Concrete Removal - removal of circular concrete base	1	650.00	650.00
Asphalt Patch - patch of asphalt to fill in excavated concrete base	1	200.00	200.00

I look forward to doing business with you!

**TOTAL**

**\$1,500.00**

Stathis

Accepted By

Accepted Date





**MUSEUM DISTRICT  
NEARTOWN GATEWAY**

**1997**

**Houston's First Gateway Monument**

**In recognition of community  
commitment to  
Art and Enterprise**



**Frost Bank**

**Neartown Association**

**Museum District Business Alliance**

**H. Clay Moore, Project Coordinator  
Irving Phillips, Architect**



MONTROSE MANAGEMENT DISTRICT  
CITY OF HOUSTON  
HARRIS COUNTY, TEXAS

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AGENDA MEMORANDUM

TO: Montrose Management District Board of Directors  
FROM: Executive Director  
SUBJECT: Agenda Item Materials

---

9. Receive reports.

c. Marketing and Business Development

i. Consider Committee recommendations for a service agreement with Michael Hardy to provide professional writing services for the District, in the amount of \$500.00 per feature article, for a total monthly cost not to exceed \$2,000.00



## MONTROSE DISTRICT AGENDA MEMORANDUM

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TO: Montrose Management District Board of Directors  
FROM: David Hawes, Executive Director  
DATE: July 13, 2015  
ITEM XXX: Receive report from Marketing and Business Relations Committee

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**Staff note:** The minutes of the committee meeting of June 24 are attached for review.

**THE COMMITTEE CONSIDERED THE FOLLOWING ITEM(S):**

Receive report and discuss 2015 Communications Plan.

**Committee Recommendations:**

The committee recommends approval of a services agreement with Mr. Michael Hardy to provide writing service for the District in the amount of \$500 per feature article with a total of 4 articles per month.

**Fiscal Notes:**

The requested funding of \$2,000 per month is available and a component of the approved 2015 marketing budget and project work plan.





## MEMORANDUM

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TO: Montrose District Board of Directors  
FROM: District Executive Director  
DATE: July 13, 2015  
SUBJECT: Marketing and Business Relations Committee Meeting Minutes

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The Marketing and Business Relations Committee met on Wednesday, June 24 at 4:00 p.m. at Tradition Bank, 5020 Montrose Blvd., Suite 311, Houston TX 77006.

Montrose District Board & Committee Members present were: Robert Jara.

Staff, contractors and guests present: Gretchen Larson, Holli Robinson, Jerry Lowry, Tawny Tidwell and Michael Hardy.

### **THE COMMITTEE CONSIDERED THE FOLLOWING:**

#### **Receive report and discuss 2015 Communications Plan.**

Staff stated that all the changes discussed since the last meeting had been incorporated into the revised communications plan. They also noted that board members had suggested several new ideas which included a Flag Day-4<sup>th</sup> of July decorating contest, expanding the Sunday Streets concept to become monthly, and the hotel concierge program. Staff noted that they would develop these suggested ideas more fully and return to the committee for consideration at a future meeting.

Staff introduced Michael Hardy to the committee stating that they were recommending that he be hired to replace the previous writer/editor team whose contracts had expired in May. Staff stated that Mr. Hardy comes highly recommended and was most recently an editor at Houstonia Magazine. Staff noted that Mr. Hardy had agreed to reduce his current rate provided that he was able to craft a minimum of 4 articles per month at \$500 per article. Committee Member Jara visited with Mr. Hardy asking about his writing style and the things he thought he could do to get more of a focus on the efforts of the District. Upon conclusion of the discussion, Committee Member Jara stated that he recommended the hiring of Mr. Hardy to perform writing services for the District per his required minimum of 4 articles per month at \$500 per article.

#### **Receive report from Business Ambassador.**

BA Dennis Beedon gave the committee updates regarding visits for the past month. He stated that they continue to be well received and that feedback from businesses on the work the District was doing was very positive.

There being no further business to discuss the meeting adjourned at 5:00 p.m.

## FREELANCE WRITING CONTRACT

Parties and Assignment. This agreement (the "Agreement") is made and entered into as of the \_\_\_\_ day of \_\_\_\_\_, 2015 (the "Effective Date") by and between the Montrose Management District hereafter, referred to as Client and Michael Hardy (hereafter referred to as "Writer"). The agreement is in regards to professional freelance writing services to be performed at the direction of the Executive Director in coordination with the Marketing Director as a part of the PR and marketing strategy of the District in accordance with their adopted project work plan.

In consideration of the mutual covenants made herein, the parties agree as follows:

Work. Writer agrees to produce written materials such as text and articles (the "Work") at the request of the Client for fees agreed upon in advance and turn in or deliver the Work by an agreed upon deadline. Writer agrees that she/he will be the sole author of the Work, which will be original work by Writer, free of plagiarism. Writer agrees to use reasonable care to ensure that all facts and statements in the Work are true and that the Work does not infringe upon any copyright, right of privacy, proprietary right, right of publicity or any other right of a third party. Writer agrees that Client has the right to edit the Work as it deems appropriate for publication, and that Writer will cooperate with Client in editing and otherwise reviewing the Work prior to publication. Writer will cooperate with Client if any complaints, claims or litigation should arise regarding the Work.

Confidentiality: Writer acknowledges that he/she may be furnished or may otherwise receive or have access to information which relates to the Client's past, present or future products, vendor lists, creative works, marketing strategies, pending projects and proposals, and other proprietary information which gives the Client an opportunity to acquire an advantage over its competitors who do not know or use it (the "Proprietary Information"). Writer agrees to preserve and protect the confidentiality of the Proprietary Information and all physical forms thereof, whether disclosed to Writer before this Agreement is signed or afterward. In addition, Writer shall not disclose or disseminate the Proprietary Information to any third party and shall not use the Proprietary Information for his or her own benefit or for the benefit of any third party. Without limiting the generality of the foregoing, Writer shall be prohibited from the Client or the Work with a representative of the press or media, either directly or indirectly, without the Client's express prior written approval.

Compensation. Client agrees to pay Writer a flat fee of \$2,000 per month for 4 original feature articles.

Writer is responsible for the payment of all federal, state and/or local taxes with respect to the services he performs for the Client as an independent contractor. The Client will not treat Writer as an employee for any purpose.

Payment and Collection. Unless otherwise specified in writing, invoices not paid within 30 days of the invoice date will accrue interest at 1.5% per month. Client agrees to pay for each check returned for insufficient funds or any other reason \$25 per occurrence or 5% of the value of each returned item, whichever is greater. Client agrees to pay all reasonable attorney's fees (at least 15% of all amounts due, including interest) if any account is placed with an attorney for collection. Client agrees that the purchase of the services described herein constitutes "doing business" in the State of Texas and submits itself to the jurisdiction of the State of Texas with respect to any suit brought by The Writer to collect any sums hereunder. The parties agree that the only venue

for any suit brought by either of them with respect to the services sold hereunder shall be in the State Court of Harris County.

Client Approval. Client is responsible for written approval of work ordered (i.e., copy, design, photography, typesetting, and other services) required for the completion of the Work. This approval can be in the form of initials or facsimile.

Upon acceptance of the Work, client accepts responsibility for any further processes in which this work is used (i.e., film output, printing, etc.) Writer is not responsible for errors occurring in this work or projects related to this work after acceptance of the Work.

Changes. Any verbal or written changes made by Client to the scope of the Work following its initiation by Writer are subject to additional charges. Should such changes negate any part of the Work already completed at the time of the changes, Client accepts responsibility for payment of the completed work and all services related to it, in addition to charges for the change itself.

Term and Termination. Either party may terminate this Agreement at any time, without cause, upon thirty (30) days written notice to the other party. Contractor shall not be entitled to any payment or further payment other than for work performed or material, equipment, or supplies furnished prior to such termination. The Owner does not waive any other remedy allowed under Texas law.

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David Hawes, Executive Director  
Montrose District

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Michael Hardy, Writer

**MONTROSE MANAGEMENT DISTRICT  
CITY OF HOUSTON  
HARRIS COUNTY, TEXAS**

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**AGENDA MEMORANDUM**

**TO:** Montrose Management District Board of Directors  
**FROM:** Executive Director  
**SUBJECT:** Agenda Item Materials

---

9. Receive reports.  
f. Executive Director

**MONTROSE MANAGEMENT DISTRICT**

**SERVICE PLAN**

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**MONTHLY REPORT**

**JUNE 9 – JULY 13, 2015**

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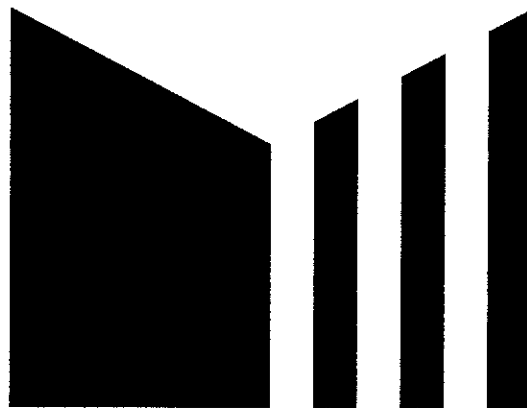
**COMMITTEE ACTIVITY**

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**STAFF ACTIVITY**

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## COMMITTEE ACTIVITY

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### **Business and Economic Development Committee**

The committee did not meet in June.

### **Marketing and Business Relations Committee**

The committee met on June 24.

### **Mobility and Visual Improvements Committee**

The committee did not meet in June

### **Public Safety Committee**

The committee did not meet in June.

### **Finance Committee**

The Committee met on July 8.

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## STAFF ACTIVITY

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JUNE 9 – JULY 12, 2015

### **Marketing and Business Relations Committee**

The Marketing Committee met on June 24 and the minutes of the meeting are included in the packet for review.

Work was completed for the June and July e-newsletters.

The quarterly business mixer on June 25<sup>th</sup> at Boheme was very well attended. The September 24<sup>th</sup> mixer will be held at Rosemont and will feature Texas spirits and mixology as well as food pairings presentation. El Tiempo has agreed to be the host for the holiday mixer which will take place December 17<sup>th</sup> from 5:00 to 7:00 p.m. The winners of the Holiday Decorating Contest are announced during the holiday mixer.

### **Business Ambassador Program**

The Business Ambassador completed **60** new visits and a total of **36** completed visits. LaGrange is now open in the old EJ space, Solutions Hair Salon moved to new location within the District, their old space being taken over by another Hair Salon called Upper Hand who is currently in the build out phase. RF Lifestyles, a new women's clothing store has opened at 1617 Westheimer. The BA also dropped off marketing materials, answered general questions and inquiries about District services and completed other assignments as directed by the Executive Director and staff.

### **Social Media**

See social media report attached. The engagement numbers continue to increase as a result of the original content creation approach adopted by the board.

### **Mobility and Visual Improvements Committee**

District staff continued to move mobility and visual improvements projects along an expedited path toward implementation. If approved by the Board, the amended Special Parking Area application will be formally submitted to the City of Houston for Plan Commission consideration. Signage and esplanade designs are complete, along with associated costs. Staff has prepared for removal of the remaining original gateway monument. Steps are being taken to begin an update to the inventory of materials and conditions within the rights-of-way completed in 2012 by Walter P Moore. The update is proposed to be a project conducted by District staff and potential interns. Staff has continued to coordinate with TxDOT regarding the bridge lighting project while Walter P. Moore proceeds to add lighting fixture details for each of the seven bridges as requested by the State. The current schedule anticipates the initial steps toward bidding the project by Fall 2015.

### **Safety and Security Committee**

Staff met the store front officers, toured the District with Officer Beserra and discussed some of the challenges the officers face each day and how we are responding to them. Met with the Assistant County Attorney to receive activity update. Staff is putting together an informal group of Montrose multi-family managers/owners to partner with and discuss items of mutually interest related to crime prevention and public safety.

### **Business and Economic Development Committee**

The Business and Economic Development Committee finalized and sent the election survey to candidates in the upcoming mayoral election. A review of responses will be provided in August.



**Finance Committee**

The committee met on July 8 and discussed invoices and various delinquent assessments. The committee approved the invoices and recommended presentation to and approval by the Board.

**Montrose District  
Social Media Report  
June 2015**

**prepared by  
Tawny Tidwell**

**July 1, 2015**

# Stats

## TWITTER:

Number of total tweets from June 01-June 30:	76
Increase in Followers for June 2015:	229
Total Followers:	5,606

## FACEBOOK:

Total number of 'likes': (Up from 11,768 in May 2015)	12,415
--	--------

Total page views this month:	178,332	by	109,400	Indiv. Users
Total page views in May:	115,584	by	74,238	Indiv. Users

## Top 5 Posts:

SCOTUS Marriage Equality	23,400
Possible Montrose Cat Café	7,700
Montrose Still Home to Largest LGBT Pop.	7,500
Staying Cool in Montrose	6,400
New Businesses in Montrose 2015	4,700

Facebook and Twitter recently purged inactive accounts. Our numbers reflect a slight dip in followers and likes as a result.

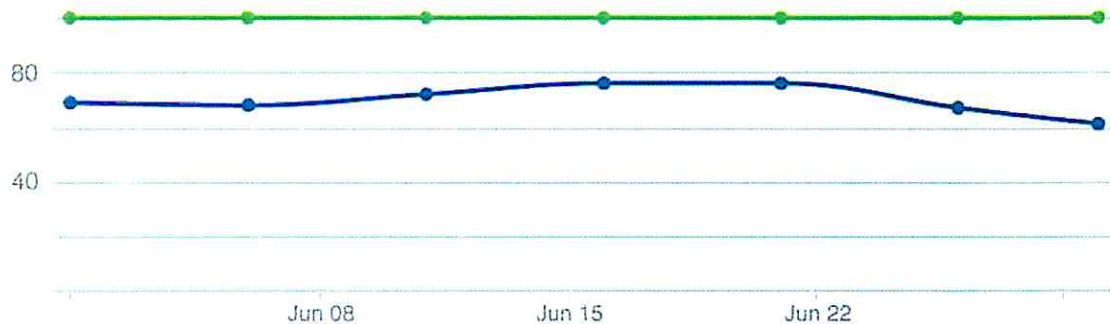
## THREE MONTH RECAP

	April	May	June
Twitter	5,119	5,373	5,606
Facebook	11,242	11,768	12,415

# Graphs

## MY SOCIAL SCORES

ENGAGEMENT **61%** INFLUENCE **100%**



Interactive Stats (above):

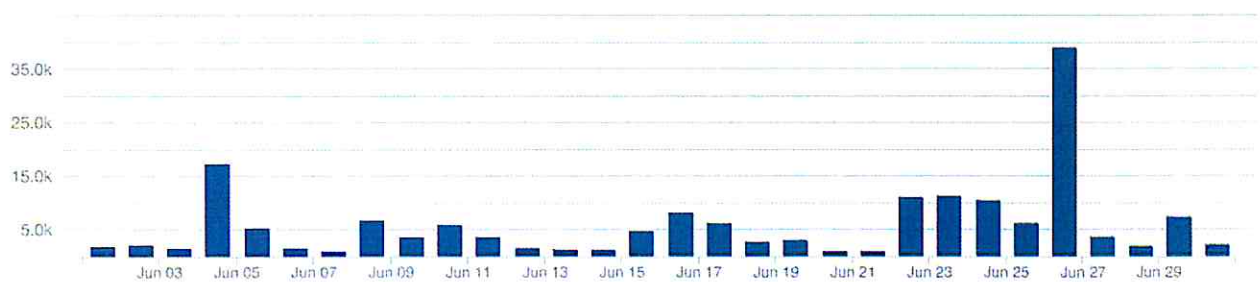
Engagement: Conversing with people on Twitter who talk about our content, and retweeting others' content.

Influence: This indicates the growth and interest level of our audience.

Engagement is currently down because we are getting a lot of spam tweets from people who do not follow us lately. Blocking/reporting spam affects engagement.

## PAGE IMPRESSIONS

Impressions **178,332** by **109,400** Users



Our engagement is up on Facebook by a pretty great margin, thanks to our new content-driven approach. People are really responding well to our original content.

# Insights

## Twitter

**Top mention** earned 183 engagements



**Houstonia Magazine**

@HoustoniaMag · Jun 22

High-end nail artistry hits [@MontroseHTX](#) with the new Dripped (and yes that's [@KamFranklin](#)): [houstoniamag.com/fashion-and-sh...](https://houstoniamag.com/fashion-and-sh...) [pic.twitter.com/SMHHxHpzon](https://pic.twitter.com/SMHHxHpzon)









🔗 2 ★ 8

[View Tweet](#)

Houstonia Mag is becoming a great source of promotion for the District. They frequently mention us in tweets about area businesses and stories, and we get good follow numbers and awareness about District economic development from their coverage.

You can see that this tweet was engaged by 183 people, which is pretty good for an individual message!

## Facebook

Page		Total Page Likes	From Last Week	Posts This Week
1	 <b>The Montrose District</b>	12.5K 	▲ 1%	5
2	 <b>Midtown Houston</b>	5.2K 	▲ 0.3%	3
3	 <b>Downtown Houston</b>	1.8K 	▲ 3.1%	0

Here's some quick comparison data on Montrose compared to Midtown and Downtown on Facebook. We post more, and have substantially more likes than the other two Districts. Our content-focused strategy really serves us in this area.



## Mini murals bring urban art closer to city streets

By Molly Glentzer | June 5, 2015



Molly Glentzer Arts, Design & Culture Writer / Editor, Houston Chronicle



Photo By Molly Glentzer

Artist Anat Ronen began painting the 8x4-foot traffic signal control cabinet at the corner of West Bellfort and Willowbend Streets with a morning glory design Thursday morning. By the day's end she had finished the first of 31 planned "mini murals" by street artists in a new program organized by UP Art Studio and supported by various municipal programs and organizations.





Houston's urban artists continue to up their street cred.

Saturday the city unveils the first of 32 mini murals by 15 painters that will transform traffic control boxes at street intersections. Most of the artists started out creating illegal graffiti, a practice they're now trying to help deter.

City officials hope the commissioned artworks, which total \$48,000, will help save graffiti abatement costs.

The mini murals also bring public art to areas of the city that have been seriously under-served. The [Houston Arts Alliance](#) says only 35 objects in the city's 546-piece civic art collection (not counting works at the airports) reside outside the Loop, where four-fifths of the population lives.

All but one of the mini murals will be in District K, where City Councilman [Larry Green](#) dipped into his office's service funds to support the initiative. Green said the mini murals are "an exciting way to bring civic art to communities that don't have much and also help provide a sense of community."

The program was a good fit with his ongoing "Clean it up, Green it up" beautification campaign, which has also recently planted 2,000 trees. He also wanted to support area artists.

"Some of these artists are absolutely amazing," he said.

UP Art Studio founder [Noah Quiles](#), who proposed the project, sees the city's 2,400 traffic control boxes as "blank canvases brimming with creative opportunity."



Anat Ronen created the first mini mural at the intersection of Willowbend and West Bellfort Thursday, camouflaging an 8-by-4-foot utility box with a morning glory vine design.

Ronen wants to make the boxes disappear. She painted the vine as a kind of camouflage, "so it looks like a part of the greenery," she said.

Sara Kellner, the alliance's civic art and design director, hopes to expand the mini mural program in the fall, although private funding will be necessary.

Mini murals are "an incredible, quick and beautiful way" to get art into neighborhoods, she said. "It's a high-impact, low-cost project."

She expects the pilot murals to be complete within about a month.

Quiles is working with the alliance, the mayor's office of cultural affairs, the public works department, the Brays Oaks and Five Corners Management Districts and the non-profit organization Fresh Arts.

- 
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« back to thumbnails

FCMD MINI MURALS

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Download    Add to Lightbox

5CMD\_MiniMurals-60.jpg

Image 57 of 65    < PREV    NEXT >



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