



# PETALUMA DOWNTOWN ASSOCIATION

December 16, 2024

Honorable Mayor Kevin McDonnell & Petaluma City Council Members:

On behalf of the Petaluma Downtown Business Improvement District (BID) Board of Directors and members, we extend our gratitude for your continued support.

## 2024 Overview

We are pleased to report strong engagement and dedication from business owners within the BID. The BID Advisory Committee has maintained regular monthly meetings, focusing on shopping/marketing and beautification priorities. In 2024, we introduced an educational component to these meetings, featuring small business support organizations such as the Sonoma County Small Business Development Center and Blue Zones.

The PDA Executive Director meets regularly with most city departments to discuss downtown issues, upcoming events and projects that impact on the downtown business community. The BID advisory committee acknowledge and appreciate being better connected to and served by the City thanks to the Police and Economic Development staff's participation at BID meetings and response to individual business needs.

## Key Activities Funded in 2024

**Marketing and Events** play a critical role in boosting downtown visibility and supporting small businesses. In 2024, the BID organized several successful events to drive foot traffic and sales, including:

- **Annual Sidewalk Sale (August)**
- **Trick or Treat Trail (October)**
- **Holiday Open House and Marketplace (December)**

The BID also introduced new initiatives like the Maritime Passport to encourage boating visitors to shop downtown, a Holiday Shopping Passport, and a Bingo game for children. Marketing efforts were amplified through partnerships with the Visitor Program and Downtown Association.

**Security** - Due to budget constraints and the inability to adjust assessments for inflation, security coverage was reduced in 2024. To address this, we adjusted contract coverage areas and ensured the security team remained responsive to specific issues. Daily reports on security activities provided valuable insights and facilitated timely responses.

**Beautification** - The BID continued its investment in enhancing downtown's aesthetic appeal, including purchasing and installing annual holiday lighting, banners, and decorations. We collaborated with the City to support efforts to replace waste receptacles and expand holiday lighting in Center Park, Helen Putnam, and North Water Street.

**2024 Financial Report** - In 2024, the BID collected \$52,768, reflecting a 72% collection rate based on the initially estimated assessment amount of \$73,000. However, the actual amount billed during the year was \$64,000 to 571 businesses, meaning the true collection rate was 82.5%. Going forward the 2025 budget will be set at \$64,000.

Some closed businesses were replaced by new ones operating at the same locations. Since newly established businesses are exempt from the assessment during their first calendar year, we anticipate recapturing a portion of the lost revenue in 2025 as these businesses become subject to assessment.

The table below shows income from assessment 2015-2024

2015 \$61,940  
2016 \$71,544.  
2017 \$65,206  
2018 \$67,458 (Includes collections from 2017)  
2019 \$74,000 (Includes collections from 2018)  
2020 \$67,101 (Approximately 10% down from previous year due to Covid-19)  
2021 \$69,293 (Reflects permanent and temporary closures due to Covid)  
2022 \$63,512 (8% lower than prior year reflecting ongoing COVID related closures)  
2023 \$54,743 (15% lower due to business closures)  
2024 \$52,867 (82.5% collection of the \$64,000 billed)

Attached are the 2025 annual report, Assessment Schedule, and Map, proposed budget, and map that require Council approval. The 2025 BID budget approved by the BID advisory committee is allocated as follows:

27%	Security	\$17,280
23%	Marketing	\$14,720
30%	Beatification	\$19,200
20%	Administration	\$12,800
<b>TOTAL:</b>		<b>\$64,000</b>

This budget assumes a collection at 100%. If actual collections fall short, we will adjust spending accordingly. Over the past few years, BID costs have risen. As a result, in 2025, we will reassess ongoing expenses, such as security, as we have been relying on reserve funds to maintain current service levels.

**Billing and Collections** - For 2025, Mungle & Associates will once again manage billing and collections. Their services will include:

Billing both existing and new businesses for 2025 and collecting delinquent assessments from 2023-2024

The 2025 BID billing packet will include:

- A cover letter.
- A BID invoice.
- A map of the BID area.
- An information update form to help us maintain accurate records.

The BID Committee maintains an up-to-date database for billing and actively discusses strategies to address outstanding delinquencies.

We value our continued partnership with the City and hope to see you at one of our events or BID meetings in 2025.

Yours sincerely,



Historic Depot Building • 210 Lakeville Hwy , Petaluma CA 94952  
PetalumaDowntown.com  
(707) 762-9348 • Info@PetalumaDowntown.com

## **BID ANALYSIS 2023-2024**

[illegible]

## BUDGET

BID	2014/15	2014/15	2015/16	2015/16	2016/17	2016/17	2017/2018	2017/2018	2018/2019	2018/2019	2019/2020	2019/2020	2020/21	2020/2021	2021/22	2021/22	2022/23	2022/23	2023/24	2023/24
	%	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%	Actual
Security	32%	\$19,821	32%	\$ 22,895	27%	\$ 17,606	27%	\$ 18,214	27%	\$ 19,980	27%	\$ 18,117	27%	\$ 18,709	27%	\$ 17,148	27%	\$ 14,780	27%	\$ 14,247
Marketing	28%	\$17,343	28%	\$ 20,033	23%	\$ 14,997	23%	\$ 15,515	23%	\$ 17,020	23%	\$ 15,433	23%	\$ 15,937	23%	\$ 14,608	23%	\$ 12,591	23%	\$ 12,137
Beautification	20%	\$12,388	20%	\$ 14,308	30%	\$ 19,562	30%	\$ 20,237	30%	\$ 22,200	30%	\$ 23,610	30%	\$ 20,788	30%	\$ 19,054	30%	\$ 16,423	30%	\$ 15,830
Administration	20%	\$12,388	20%	\$ 14,308	20%	\$ 13,041	20%	\$ 13,492	20%	\$ 14,800	20%	\$ 13,420	20%	\$ 13,859	20%	\$ 12,702	20%	\$ 10,949	20%	\$ 10,554
	100%	\$61,940	100%	\$71,544	100%	\$ 65,206	100%	\$ 67,458	100%	\$ 74,000	100%	\$ 67,101	100%	\$ 69,293	100%	\$ 63,512	100%	\$ 54,743	100%	\$52,768

13/14 Budget	Change in % approved by BID committee, effective June 2014 - result of reduction in camera lease contract back to 08/09 levels
14/15 Budget	BID increase in income due to past payments coming in for 2012 thru 2015
15/16 Budget	BID increase objective to receive payments from businesses not previously billed
16/17	change % distribution to increase downtown beautification due to security camera elimination
2017/18-2019	No Changes
2018/19	Increase in collection of assessment fees, due improvement of BID communications and local collection.
2019/2020	Initial good payment rate but declined due to business closures due to Covid-19
2020/21	Despite the closure of a number of downtown Businesses we collected 92% of assessments
2021/22	Collection down 8% due to covid related closures and 1st year exemption for new businesses
2022/23	We billed 571 businesses this year and collected 72%, in 2019 we billed 628 with a collection rate of 80% 77%
2023/24	We billed 577 businesses this year and collected 72%
2024/25	Adjusting expected budget to reflect number of businesses actually billed \$64,000 down from \$73,00 in 2025

PETALUMA DOWNTOWN ASSOC  
 BID ANALYSIS - 07/01/14 TO 06/30/24

	MARKETING 28%	SECURITY 32%	BEAUTIFICATION 20%	ADMINISTRATIVE 20%	TOTAL 100%
BALANCE 07/14-06/15	15,570.93	15,028.99	27,915.56	-2,397.93	56,117.55
RECEIVED 07/15-06/16	20032.54	22894.34	14308.96	14308.96	71,544.80
EXPENSED 07/15-06/16	-9,236.90	-7,431.55	-21,969.40	-10,405.23	-49,043.08
BALANCE 07/15-06/16	26,366.57	30,491.78	20,255.12	1,505.80	78,619.27
Change in Percentages	23%	27%	30%	20%	100.00%
RECEIVED 07/16-06/17	14902.91	17494.72	19438.58	12959.05	64,795.26
EXPENSED 07/16-06/17	-5,982.10	-12,432.83	-25,360.34	-11,112.43	-54,887.70
BALANCE 07/16-06/17	35,287.38	35,553.67	14,333.36	3,352.42	88,526.83
RECEIVED 07/1-06/18	15515.41	18214.55	20237.5	13490.89	67,458.35
EXPENSED 07/17-06/18	-12,794.74	-15,592.55	-13,430.87	-9,786.15	-51,604.31
BALANCE 07/17-06/18	38,008.05	38,175.67	21,139.99	7,057.16	104,380.87
RECEIVED 07/18-06/19	17,020.00	19,980.00	22,200.00	14,800.00	74,000.00
EXPENSED 07/18-06/19	-15,003.13	-19,521.90	-24,705.20	-11,153.16	-70,383.39
BALANCE 07/18-06/19	40,024.92	38,633.77	18,634.79	10,704.00	107,997.48
RECEIVED 07/19-06/20	15,433.40	18,117.47	20,130.52	13,420.35	67,101.74
EXPENSED 07/19-06/20	-15,234.41	-25,528.34	-23,610.12	-22,800.69	-87,173.56
BALANCE 07/19-06/20	40,223.91	31,222.90	15,155.19	1,323.66	87,925.66
RECEIVED 07/20-06/21	15,937.42	18,709.15	20,787.95	13,858.63	69,293.15
EXPENSED 07/20-06/21	-2,496.91	-21,436.62	-36,111.80	-12,403.00	-72,448.33
BALANCE 07/20-06/21	53,664.42	28,495.43	-168.66	2,779.29	84,770.48
RECEIVED 07/21-06/22	14,607.76	17,148.24	19,053.60	12,702.40	63,512.00
EXPENSED 07/21-06/22	-33,540.51	-26,614.24	-8,172.06	-12,091.85	-80,418.66
BALANCE 07/21-06/22	34,731.67	19,029.43	10,712.88	3,389.84	67,863.82
RECEIVED 07/22-06/23	12,591.10	14,780.86	16,423.17	10,948.77	54,743.90
EXPENSED 07/22-06/23	-12,777.78	-30,167.65	-10,226.52	-9,453.72	-62,625.67
BALANCE 07/22-06/23	34,544.99	3,642.64	16,909.53	4,884.89	59,982.05
RECEIVED 07/23-06/24	12,136.78	14,247.54	15,830.58	10,553.70	52,768.60
EXPENSED 07/23-06/24	-2,335.46	-26,481.33	-16,279.74	-18,198.67	-63,295.20
BALANCE 07/23-06/24	44,346.31	-8,591.15	16,460.37	-2,760.08	49,455.45





Petaluma Downtown Business Improvement

c/o Mungle & Associates  
628 E Washington St., Ste A  
Petaluma, CA 94952

# Invoice

Date	Invoice #
1/1/2025	5738
Account #	10001

Bill To
628 E Washington St STE A Petaluma, CA 94952

Customer E-mail
carol@cmungle.com

Due Upon Receipt
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Location

Description	Amount
Professional Business. Zone A Level 1  <b>THIS IS A MANDATORY ASSESSMENT IN ACCORDANCE WITH THE PETALUMA BUSINESS IMPROVEMENT DISTRICT ORDINANCE</b>  <div><p>We accept credit card payments. You should be receiving a digital copy of this invoice in your email. If you don't receive an email &amp; prefer to pay with your credit card, please contact us at PetalumaBid@cmungle.com, or call 707-241-0195.</p></div> <div><p>This invoice reflects the amount our records indicate you owe for the current year. Please see the back of this form for more information regarding the BID billing rates. Please fill in the form if you think the rate charged is not correct.</p><p>Please also fill in the update form and return to us with current contact information for your business.</p></div> <p><b>Thank you! Your payment contributes to keeping the Business Improvement District vibrant!</b></p>	125.00
DUE UPON RECEIPT    DELINQUENT: APRIL 1, 2025	<b>Total</b> \$125.00

BID Phone # 707-241-0195
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City of Petaluma, CA  
Downtown Business Improvement District (BID)  
Mungle & Associates – as administrating agent  
628 E. Washington Street Suite A  
Petaluma, CA 94952



February 2025

Dear Business Owner/ Tax Manager:

**\*\*2025 CITY OF PETALUMA DOWNTOWN BUSINESS IMPROVEMENT DISTRICT (BID)\*\***

The City of Petaluma City Council partners with Mungle & Associates for assistance in the collection of its mandatory Downtown Business Improvement District (BID) fees. This mailing is to transmit the 2025 Downtown Business District fees invoice that is due upon receipt and becomes delinquent on April 1, 2025. If late, late fees will apply.

This invoice is based and is calculated per your zone location, type of business and number of employees. To verify your calculation, the City of Petaluma uses data from the State Employment Development (EDD) regarding the number of employees submitted to them. Please be aware that it is important that the number of employees is accurately calculated and reported. Employees are calculated on full time hours (part time employees should be added together to get a full time equivalent) If you have any questions regarding zoning or number of employees, please contact Mungle & Assoc, at (707)-241-0195 or email Mungle & Assoc, at [PetalumaBID\(5\)cmungle.com](mailto:PetalumaBID(5)cmungle.com).

Mungle & Associates Remittance Address:

Mungle & Associates Attn: Petaluma BID  
628 E. Washington Street. Suite A  
Petaluma CA 94952

(Make Checks Payable to: Petaluma Downtown BID)

The assessment was established in November 2000, when the Petaluma City Council adopted Ordinance 214 N.C.S. establishing the Downtown Business Improvement District (BID). This occurred at the request of the Petaluma Downtown Association (PDA), after an extensive public hearing process, required by State Law. During the process, local business owners who were to be included in the BID had the opportunity to protest the formation of the district and terminate the process. However, recognizing the utility of the BID, very few chose to oppose the BID and the District was formed. The PDA Board serves as the BID Board of Directors and administers the funds collected from you by the City of Petaluma. The PDA does not have the authority to change this ordinance or grant exemptions.

According to the 2025 annual report of the BID, approved by the Petaluma City Council in January 2025, assessment of funds will be used as follows:

27% Downtown Security	\$17,280
23% Downtown Marketing	\$14,720
30% Downtown Beautification	\$19,200
20% Administration	\$12,800
Total:	\$64,000

Your support of the Downtown Business Improvement District by making your timely mandatory payment continues the efforts made to maintain an economically vibrant and attractive downtown.

Sincerely yours,

Mungle & Associates  
As administering agent for the City of Petaluma



**City of Petaluma, CA**  
**Downtown Business Improvement District (BID)**  
**2025 Mandatory Assessment**  
**Payable to: Petaluma Downtown BID**

Mail To: Downtown BID c/o Mungle & Associates 628 E Washington St, Ste A, Petaluma, CA 94952

Phone: (707) 241-0195 • Email: [PetalumaBid@cmungle.com](mailto:PetalumaBid@cmungle.com)

Due upon receipt

Delinquent: April 1, 2025

10% Penalty Phase: May 1, 2025

**Downtown Petaluma Business Improvement District (BID) Assessment Fee Table**

**Retail, Restaurant and Antique Collectives:** Businesses that buy and resell goods or comestibles. Examples are clothing stores, shoe stores, office supplies and antique shops as well as businesses that sell prepared foods and drinks.

**Service Businesses:** Businesses that sell services. Examples are beauty and barbershops, repair shops, most automotive orientated businesses, entertainment businesses such as theaters, etc.

**Lodging:** Includes renting rooms by the day or week to community visitors.

**Professional Businesses:** Includes Architects, Engineers, Attorneys, Dentists, Doctors, Accountants, Optometrists, Realtors, Insurance Offices, Mortgage Brokers and most other businesses that require advanced and/or specialized licenses and/or advanced academic degrees.

**Financial Institutions:** Includes Banking, Savings, Loan and Credit Unions.

*(Employees are calculated on full-time hours. Part-time employees should be added together to get a full-time equivalent.)*

Description of Business	Zone A	Zone B	Zone C
<b>Retailers and Restaurants:</b>			
0-3 employees	\$ 150.00	\$ 100.00	\$ 50.00
4-6 employees	\$ 250.00	\$ 166.00	\$ 83.00
7+ employees	\$ 350.00	\$ 232.00	\$ 116.00
<b>Antique Collectives:</b>			
0-3 employees	\$ 150.00	\$ 100.00	\$ 50.00
4-6 employees	\$ 250.00	\$ 166.00	\$ 83.00
7+ employees	\$ 350.00	\$ 232.00	\$ 116.00
<b>Service Businesses:</b>			
0-3 employees	\$ 100.00	\$ 75.00	\$ 50.00
4-6 employees	\$ 200.00	\$ 150.00	\$ 100.00
7+ employees	\$ 300.00	\$ 225.00	\$ 150.00
<b>Professional Businesses:</b>	\$ 125.00	\$ 82.00	\$ 41.00
<b>Financial Institutions:</b>	\$ 500.00	\$ 500.00	\$ 500.00
<b>Lodging:</b>			
1 – 10 rooms	\$ 150.00	\$ 150.00	\$ 150.00
11 – 25 rooms	\$ 250.00	\$ 250.00	\$ 250.00
26+ rooms	\$ 350.00	\$ 350.00	\$ 350.00

Enter # of employees, operators, dealers or rooms: \_\_\_\_\_

*(Employees are calculated on full-time hours. Part-time employees should be added together to get a full-time equivalent.)*

In the table above, please circle fee assessment and enter amount due: \$ \_\_\_\_\_

If Paid after May 1st, 10% Penalty: \$ \_\_\_\_\_

Total Due: \$ \_\_\_\_\_

*(Make Checks Payable To: Downtown BID)*

**Returned Check Disclaimer:** Each returned item received due to insufficient funds will be electronically represented to the presenters' bank no more than two times in an effort to obtain payment. Downtown BID is not responsible for any additional bank fees that will accrue due to their submission of the returned item.





## Petaluma Downtown BID Business Update Form

### Remittance Address:

Petaluma Downtown BID c/o Mungle & Associates • 628 E Washington St, Ste A, Petaluma, CA 94952

Phone: (707) 241-0195

Email: [PetalumaBID@cmungle.com](mailto:PetalumaBID@cmungle.com)

Instructions: Please complete this form if you have any changes to your account. To ensure that we have the correct information regarding your business and the number of employees you have, please update applicable sections on this form and return with your BID payment and remittance form to the address listed above. Thank you for taking the time to provide updated information on this form.

Business Name: \_\_\_\_\_ Account #: \_\_\_\_\_

DBA: \_\_\_\_\_

Business Mailing Address: \_\_\_\_\_  
(Address/City State/Zip)

Business Physical Address: \_\_\_\_\_  
(Street Address/City State/Zip)

Owner's Name: \_\_\_\_\_ Owner's Phone: ( ) \_\_\_\_\_

Business Phone: ( ) \_\_\_\_\_ Business Fax: ( ) \_\_\_\_\_

Contact Person: \_\_\_\_\_ Contact Phone: ( ) \_\_\_\_\_

Email Address: \_\_\_\_\_

Description of Business: \_\_\_\_\_

Function of Company: \_\_\_\_\_

Landlord's Name: \_\_\_\_\_ Landlord Phone: ( ) \_\_\_\_\_

### Business Classification (select all that apply):

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Retail Business or Restaurant | <input type="checkbox"/> Professional Business | <input type="checkbox"/> Financial Institution |
| <input type="checkbox"/> Antique Collectives           | <input type="checkbox"/> Service Business      | <input type="checkbox"/> Lodging               |

### Type of Business (select one):

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Sole Proprietorship | <input type="checkbox"/> LLC - Single Member | <input type="checkbox"/> Professional Association |
| <input type="checkbox"/> General Partnership | <input type="checkbox"/> LLC - Multi Member  | <input type="checkbox"/> DLLP                     |
| <input type="checkbox"/> Corporation         | <input type="checkbox"/> Governmental Agency | <input type="checkbox"/> Other (please explain)   |

Business closed or no longer doing business in the municipality? Please complete the below information and return either by Fax to 707-765-1583 or by email to Downtown BID at [PetalumaBID@cmungle.com](mailto:PetalumaBID@cmungle.com).

I hereby affirm that my business indicated above closed or is no longer operating in the above mentioned municipality as of \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ (Date business closed).

Signature: \_\_\_\_\_ Print Name: \_\_\_\_\_

Form Completed By: \_\_\_\_\_ Print Name: \_\_\_\_\_

## EXHIBIT 1

