



Office of the City Manager

WORKSESSION

June 28, 2016

To: Honorable Mayor and Members of the City Council

From:  Dee Williams-Ridley, City Manager

Submitted by: Michael Caplan, Economic Development Manager

Subject: Economic Development Update: Telegraph Commercial District

SUMMARY

In this Worksession report, the Office of Economic Development will provide Council with an economic overview of the Telegraph Avenue commercial district (“Telegraph” or “the district”), highlight the recent changes and trends, and share information that can inform policy deliberations regarding Telegraph.

Over the past several years, Telegraph has experienced a dramatic rebound and reversal of a decades-long trend of economic decline. In the three years since staff’s last presentation on the district, there have been significant advancements in economic conditions, community capacity, the development pipeline, the retail environment, and other aspects of neighborhood vitality. By numerous indicators, including commercial occupancy, sales tax performance, and private investment, the neighborhood is trending upward. The Telegraph Business Improvement District has boosted its capacity, and the community has developed plans for public art and public realm improvements that position the neighborhood for continued investment.

Despite these successes, the district continues to face a number of distinct challenges as community stakeholders seek to restore Telegraph to its position as one of the region’s most prominent and vibrant commercial districts. Several neighborhood issues persist, such as poor public realm conditions and the widespread perception that the area is unsafe. These challenges have a direct impact on the actual experience of the Telegraph district for visitors, shoppers, residents and business owners. Many observers might feel that not much has changed. The opportunities for Telegraph district stakeholders – including the City, UC Berkeley, TBID, businesses, property owners, and others – will be to build on current positive momentum by pursuing projects and activities that relate directly to Telegraph’s persistent challenges.

CURRENT SITUATION AND ITS EFFECTS

In spring 2016, OED conducted quantitative and qualitative research¹ and found indications that Telegraph is on a path towards economic recovery and reversal of many

¹ OED research activities included: analyses of economic, demographic and local datasets; direct

of the negative trends in neighborhood and commercial development that had previously been observed. These improving conditions reflect the regional economic recovery and boom that the Bay Area has enjoyed over the past several years as well as specific actions taken by Council, staff and community partners. Key findings include the following:

- **Commercial vacancy rates have declined significantly.** As of March 2016, the ground floor commercial vacancy rate was 7.4%, a dramatic reduction from a rate of 17% where it stood as recently as three years ago (see Attachment 2). A number of large, long-vacant commercial spaces have recently been reactivated by new businesses. Additionally, the City-owned Telegraph Channing Mall is nearly fully leased. *This decreased vacancy rate reflects the stronger demand for ground floor commercial spaces in the south Campus area and around the City.*
- **The outlook for real estate and commercial development has improved.** Several major mixed use projects are in various phases of the development pipeline (see Attachment 3 and pages 5-6 below), representing approximately 500 new housing units, 783 new dorm beds, and over 50,000 square feet of commercial space. This follows from the City's modifications to land use controls (see Background section, pages 10-11 below), and also reflects the increasing demand, evident throughout the region, for housing in walkable, transit-accessible commercial districts. Property owners and new business owners have also made significant upgrades to existing commercial spaces. *The private sector is now demonstrating a strong desire to invest in the future of the Telegraph district.*
- **Sales tax collection is up.** (See Attachment 4, Sales Tax Revenue in the Telegraph District, 2006-2015.) In 2015, the City of Berkeley collected \$999,380 of sales tax revenue for businesses in the Telegraph district (representing 1% of total taxable sales for that area). This compares favorably to an average of \$918,542 per year collected during the three year period of 2006 to 2008, prior to the downturn. Adjusted for inflation, the City collected an average of \$1.04 million per year (in 2015 dollars) during the three-year period of 2006 to 2008. *Commercial district performance, as measured by sales tax collected, has recovered to its pre-recession level from 2006 - 2008.*
- **Increased restaurant sales have been the primary driver in the recovery of the Telegraph District's sales tax performance.** Taxable retail sales in the Telegraph district, despite an increase in 2015 (the first annual increase since 2011), declined by approximately 11% overall from 2006 to 2015. Over the same period, food and beverage services sales increased by 84%. Sales at limited service and quick service restaurants nearly doubled, while sales at full service restaurants also experienced significant growth. In 2006 food and beverage

collection of an inventory of ground-floor commercial spaces; review of historic surveys conducted by UC and Telegraph Business Improvement District; and interviews of key neighborhood stakeholders.

services generated approximately 27% of all taxable sales in the district while in 2015 they generated 44%. While restaurant sales have been a strong positive for the district and its economic recovery, it is clear that the decline in retail product sales represents a significant shift in the district's tenant mix and identity going forward.

- **Telegraph Business Improvement District (TBID) has increased its capacity and undertaken a series of new activities and projects to maximize its impact.** TBID, established in 1998 as property-based business improvement district, has historically focused its resources on providing cleaning and hospitality services through its ambassador program. In 2014 TBID engaged Block by Block to implement its Ambassador Program, freeing up staff time for other economic development activities. Following this transition, TBID brought on a new Executive Director, Stuart Baker, who increased outreach to merchants and other stakeholders, and refocused staff energy on a number of neighborhood development projects.

Under Mr. Baker's leadership, TBID completed its first strategic plan in fall 2015, refining its mission and vision statements and identifying objectives and activities for the organization (see Attachment 5, TBID Strategic Plan Executive Summary). TBID also spearheaded the development of the Telegraph Public Realm Plan (see below) and has begun coordinating the implementation of a number of public realm and public art projects. In 2016, TBID is pursuing an early renewal and expansion of its boundaries (see Attachment 6, Proposed TBID Expansion).

- **University of California, Berkeley has expanded its investments and participation in the adjacent Telegraph District.** Over the past several years, UC has made dramatic real estate investments in the district, including the redevelopment of Sproul Plaza and the Student Center and the current construction of the Aquatics Center. The planned Stiles Hall project will provide 783 new beds for students, and there are feasibility analyses underway for the adaptive reuse of the former Berkeley Art Museum building at 2626 Bancroft Way. In addition to these real estate investments, the University has supported a variety of revitalization projects in the district through financial resources from the Chancellor's Community Partnership Fund and staff support from the Office of Physical Planning and Real Estate. With an expected increase in undergraduate enrollment by approximately 4,000 students over the next four years, Telegraph's role as a residential and commercial center for the University, as well as its effective "front door" is as critical as ever.
- **The recently completed Telegraph Avenue Public Art Plan and Telegraph Public Realm Plan identify opportunities for investment in the district.** Over the past year, inclusive and comprehensive processes have resulted in the creation of two plans that provide a framework for investments in art, amenities

and infrastructure in the public realm. The Telegraph Avenue Public Art Plan, developed by Morelab, LLC with support and oversight from the Civic Arts Commission, identifies strategies, locations, and themes for the implementation of art projects (both near-term and long-term, temporary and permanent) that will enliven and enrich the district (see Attachment 7, Telegraph Avenue Public Art Plan). The Telegraph Public Realm Plan, developed with support from the UC Chancellor's Community Partnership Fund, provides design and implementation guidance for streetscape improvements, vetted by City staff and technical advisors, that will enhance Telegraph as a pedestrian-friendly place and distinctive destination (see Attachment 8, Telegraph Public Realm Plan). *These new plans are mutually supportive and will provide guidance to public and private sector stakeholders making investments in and around Telegraph; they will also help the City and TBID attract additional funding for the district.*

Additional Findings: Key Neighborhood Assets

Stakeholders and staff research identified these factors that are advantageous for Telegraph and contribute to optimism regarding the future of the district.

- **History and Distinct Character.** The Telegraph district is widely known as the birthplace of the free speech movement and a hotbed of the anti-establishment counterculture of the 1960s. This history – along with the district's many unusual and longstanding businesses – helps define the unique character and sense of place that sets Telegraph apart from other commercial districts. Because of its location, history and high density of student housing, it is the most student-oriented commercial district in the City, exuding a particular college-town vibe. All of these elements are strong assets and help establish the area as a destination for regional and even global tourism.
- **Location and Accessibility.** Telegraph's proximity to UC Berkeley, accessibility to BART and AC Transit, and central location within the East Bay region contribute to the district's strong potential as a vibrant commercial destination.
- **Walkability.** Telegraph is a relatively narrow street with short pedestrian crossings. Its right of way is just 60 feet on the four blocks from Bancroft Way to Dwight Way. That compact scale, an attractive (although inconsistent) tree canopy, and a number of historic buildings all contribute to the district's walkability and character.
- **Residential Density and Concentration of Students.** There is a concentration of dormitories and other high-density housing stock in the residential neighborhoods immediately adjacent to the district, which helps maintain a high level of foot traffic despite a challenging pedestrian and retail environment (as noted below). However, much of this population is 'transient' and the district's experiences an extreme drop-off in activity during the summer and University holidays.

- **Pipeline Development Projects.** There are a number of residential and mixed-use development projects in various phases of the development pipeline (recently completed, under construction, or proposed) that, cumulatively, will bring thousands of new residents and new commercial development to the district over the next three to five years (see Attachment 3). These projects and their new residents will boost local buying power, diffuse quality of life issues and improve public safety by generating more 'eyes on the street'. In particular, development at Haste Street and Telegraph Avenue will help to reactivate an intersection that has, for years, depressed commercial activity in the district. Most of these projects have no off-street parking and are designed as housing for the student population. These projects include:
 - **Ellen Blood House & John Woolley House restoration (completed).** These two historic residences were re-located from elsewhere in the district to a lot at Regent Street and Dwight Way, restored in 2015 and repurposed as five modern apartments. This project not only secured these historic resources as long-term assets for the neighborhood and created new housing in the process; it also freed up two larger sites (2526 Durant Avenue and 25019 Haste Street) for larger scale development.
 - **2441 Haste Street “Sequoia Apartments” (nearly completed).** This project will replace the former Sequoia building, destroyed by a massive fire in November 2011, with a mixed-use building that includes 42 housing units and approximately 5,800 square feet of ground floor commercial space. The commercial spaces will be occupied by the former businesses that occupied the site – Raleigh’s and Mezzo (formerly Café Intermezzo) – and will include a large courtyard patio. Construction is nearly complete, with occupancy expected in August.
 - **2526 Durant Avenue (nearly completed).** The former site of the Ellen Blood House has been freed up for the development of a 5-story mixed-use building featuring 44 housing units and 5,210 square feet of ground floor commercial space that will be occupied by two restaurants. Construction is nearly complete and the building will be occupied by summer 2016.
 - **2539 Telegraph Avenue “The Nexus” (under construction).** In December 2015 the Zoning Adjustments Board (ZAB) issued a use permit to construct a 6-story mixed-use building with 70 housing units and 5,219 square feet of ground floor commercial space at the site of the former home of Center for Independent Living. Construction design is currently underway and construction should begin by the end of 2016.
 - **Stiles Hall (entitled, pending start of construction).** UC Berkeley plans to construct a dormitory-style housing project at the lot bounded by

Bancroft Way, Durant Avenue, and Dana Street that will include 783 beds, a 5,300 tenant space for the nonprofit that currently occupies the site, and a 7,000 square foot ground floor commercial space fronting Bancroft Way. The project was approved by UC Regents in May 2016; construction is expected to begin in December 2016 for completion and occupancy in August 2018.

- **2556 Telegraph Avenue (proposed, pursuing entitlements).** The site, currently occupied by “The Village” shopping mall, recently changed hands, and the new owner has proposed to build a 7-story mixed-use building with 76 housing units and approximately 3,700 square feet of ground floor commercial space. The project is expected to be reviewed at ZAB later this year.
- **2501-9 Haste Street “El Jardin” (proposed, pursuing entitlements).** A mixed-use residential building with retail on the ground floor, with an attractive and distinctive design, is proposed for this long-vacant site. The project proposal, subject to slight modifications, hopes to receive approval at ZAB later this year.
- **2480-2580 Bancroft Way (early stage – no proposal yet received).** The site, currently occupied by the Bancroft Center shopping mall, recently changed hands, and the new ownership is exploring development plans that will likely include a 7- or 8-story mixed-use building, with housing above retail. An application will likely be submitted to the City in summer 2016.
- **New and Existing Independent Small Businesses.** The diverse small businesses in the district attract shoppers from the immediate neighborhood, UC campus and beyond. In addition to the storefront businesses, sidewalk vendors (primarily concentrated on the two blocks of Telegraph between Bancroft and Channing) contribute to Telegraph’s distinctive neighborhood character and help to offset and displace negative sidewalk behaviors.

Many new, independent businesses have opened in the district over the past year, contributing to a dramatic reduction of the ground floor commercial vacancy rate (see Attachment 2). Notable projects include:

- the Mad Monk at 2454 Telegraph Ave, a retailer of books and records occupying a roughly 10,000 square foot space, formerly occupied by Cody’s Books, that had sat vacant for a decade;
- the Tap Haus at 2516 Durant Ave, a restaurant, bar and billiards hall that opened in 2015 and will soon expand to an additional space in the building;

- the pending re-opening, expected in July 2016, of Raleigh's and Mezzo (formerly known as Café Intermezzo), two well-loved businesses that closed as a result of the November 2011 fire at the Sequoia building;
- assorted small, independent businesses including Taco Sinaloa, Little Gem Belgium Waffles, Huckleberry Bicycles, Sodoi Coffee, Anastasia Clothing, Peak Point, J-Town Express, and Bay Jui-Jitsu Berkeley. Games of Berkeley announced in May 2016 that it will be relocating to the Telegraph district later this year; this will fill a large persistent vacancy on Durant and add a destination, anchor retail business that will attract shoppers to the district. Most recently, a new independent business, Romeo Coffee, announced its pending opening at Telegraph & Dwight in the space formerly occupied by Shakespeare & Co bookstore.

Additional Findings: Persistent Challenges

Amidst the positive economic trends, assets and causes for optimism noted above, several factors continue to challenge the district and depress commercial activity.

- **Public Realm Conditions.** A majority of community stakeholders and intercept survey respondents cited the poor conditions of the public realm and lack of cleanliness as challenges that detract from the pedestrian environment and make the district less attractive and viable as a commercial destination. This challenge persists despite the TBID's annual investment in supplemental cleaning and hospitality services for the district. In particular, stakeholders note that the poor condition of sidewalks as a crucial factor to be addressed.
- **Safety & Sidewalk Behavior.** Stakeholders and survey respondents also cited safety and sidewalk behavior as among the top challenges. The district experiences a high concentration of criminal incidents relative to the City overall, with particular hotspots on the 2450 block of Telegraph and at People's Park. Also, Telegraph has for years experienced a concentration of young, transient individuals that gather in sidewalk encampments and sometimes engage in aggressive pan-handling, harassment of pedestrians, and illegal drug trade. Stakeholders cited the negative impacts that these encampments and behaviors have on pedestrian accessibility, perceptions of safety and the commercial environment.
- **Competition.** Telegraph has suffered from competition on multiple fronts. The retail businesses and sectors that have historically served as anchors of the district – books and music – have been particularly susceptible to the rise of internet shopping and digital media. The emergence of Downtown Berkeley as a destination for shopping and dining, as well as the expansion and improved quality of food services on the UC campus, has likely diverted some of Telegraph's market. Additionally, many students have demonstrated a preference for the well maintained atmosphere and concentration of large

retailers on Bay Street in Emeryville, particularly when shopping for apparel and other soft goods.

- **Telegraph’s Identity Crisis.** Many stakeholders point out that the history and character of Telegraph is no longer relevant to the commercial district’s primary market, the UC student body. There is tension between district stakeholders that want to highlight that history in campaigns to market the district – e.g., using “Peace” symbols, tie-dye, and other imagery of the 1960s – and other stakeholders that would rather see the district pursue a more modern brand. One consequence of this tension is that efforts to market the district have been piecemeal and erratic rather than consistent and coordinated.
- **Inadequate Tenant Mix.** The existing ground-floor commercial inventory has a high concentration of food services and would benefit from greater diversity. There is an unmet demand for more retail (particularly soft goods) and entertainment options. The district would also benefit from more anchor businesses that can attract visitors from outside of the immediate neighborhood.

Opportunities & Recommendations

As measured by a wide variety of indicators – e.g., commercial occupancy, sales tax performance, and increasing optimism of key stakeholders – Telegraph is in the midst of a strong rebound and reversal of the decades-long trend of decline. In some instances, this recovery relates to specific actions taken by City Council and an inter-departmental staff team that focused attention on the district during FY 2014 (e.g., modifications to land use controls have led to increased private investment). However, the challenges that persist, such as poor public realm conditions and the widespread perception that the area is unsafe, have a direct impact on the actual experience of the Telegraph district for visitors, shoppers, residents and business owners. Despite the recent progress, many observers might feel that not much has changed.

Given this context, there are present opportunities for Telegraph district stakeholders – including the City, UC Berkeley, TBID, businesses, property owners, and others – to build on current momentum by pursuing projects and activities that relate directly to Telegraph’s persistent challenges.

- **Implement the Telegraph Public Art and & Public Realm Plans.** Investments in public art and other aesthetic improvements and amenities in the public realm will help to offset one of the district’s primary challenges, the broadly negative perception and actual experience of the pedestrian environment. The recently completed plans (see Attachments 7 and 8, and page 3 above) identify design concepts, artistic themes, and specific improvement projects for which there is broad consensus and support from community members and that have been vetted by public officials and partner agencies (including Public Works, emergency responders, AC Transit, and UC Berkeley).

There are several projects currently underway to pilot or implement elements of each plan. Pending TBID-led projects include sidewalk etching, murals, a map casement, custom bike racks, and an art plaza – including a curb extension – at the northeast corner of Telegraph and Durant. The City will be launching a pilot of the Big Belly waste collection program on Telegraph this summer, and has implemented improvements to tree wells on the Avenue in accordance with the plan.

City staff should continue to identify and pursue opportunities to leverage general fund expenditures toward implementation of the community's plans. Stakeholders have identified sidewalk improvements, a "gateway" treatment at Dwight Way, other large-scale public art projects, and improved pedestrian lighting as the public realm projects with the greatest potential impact for the district. Additionally, staff, elected officials, and other partners should pursue grants and other funding sources for a comprehensive overhaul of the streetscape.

- **Enhance the district's relevance to students by pursuing strategic revitalization activities such as events, activities, and branding.** While the heated debate over the 'identity' of the Telegraph district will likely continue, stakeholders agree that the district's success and viability will hinge upon its relevance to the UC student body. TBID, property owners, and other stakeholders should implement activities, events, a retail strategy, and marketing campaigns to address that primary market.
- **Support TBID campaign for renewal and expansion.** TBID is currently reaching out to stakeholders regarding the possibility of an early renewal of the PBID, including an expansion of the boundaries and budget. This expansion will leverage more resources for cleaning and maintenance services, neighborhood marketing, capital projects, and other economic development activities. The City can support this renewal and expansion, as a voting property owner and also by providing technical assistance and assisting with community outreach.
- **Leverage annual events to enhance the neighborhood's reputation and support existing merchants and vendors.** Ongoing annual events – the Telegraph Holiday Street Fair and the Berkeley World Music Festival – attract significant foot traffic to the district. Another recent event series, Sundays on Telegraph, had limited impact in 2014 due to staff and budget constraints, and the series was discontinued. In the future, TBID and other stakeholders should increase the connection and coordination between annual events and existing small businesses to maximize impacts for the neighborhood.
- **Continue to activate underutilized sites in the district.** As noted above, several long vacant and underutilized sites have been activated with new small businesses or development plans. The City should work with property owners to encourage the continuation of this trend. In particular, given the current housing

crisis, UC Berkeley is in a position to engage in a community dialogue to determine a plan for People's Park that simultaneously improves conditions and services for the local homeless population, celebrates the history of the site, increases opportunities for recreation, and can ease pressure on the local housing market by creating new housing for the UC community.

- **Develop a comprehensive retail strategy that focuses on soft goods and experiential retail.** TBID, OED and other partners will coordinate with property owners and commercial brokers to develop a plan for retail attraction and communications tools that relate directly to the district's needs and opportunities.
- **Modify land use regulations to encourage the development of additional housing.** Telegraph stakeholders agree that increased population density around the district and adjacent to campus can produce positive outcomes for the community and the commercial district. Recent proposals to make additional modifications to land use controls in the Southside neighborhood, building on those recently implemented for the C-T district, warrant consideration.

BACKGROUND

The Telegraph Avenue commercial district comprises the six blocks of Telegraph Avenue from Bancroft Way to Parker Street, as well as several immediately adjacent blocks (see Attachment 1, Context Map). The district has historically served as the gateway to the University of California, Berkeley campus, and for decades (and as recently as the 1980s) was one of the most vibrant and active commercial districts in the region. In May 2013, the Office of Economic Development (OED) delivered a Council Worksession report on the long decline of the district. Key findings from the 2013 report included the following:

- **Commercial vacancy rates were up.** In spring 2013, ground floor commercial vacancy had climbed to roughly 20%.
- **Gross sales and tax receipts were in a long and steady decline.** Total taxable sales in the district had declined approximately 46% from 1990 to 2012. Sales from books and music stores, historic anchors for the district, had declined most significantly, while restaurant and food services remained constant.
- **The climate for development and retail continued to be challenging.** The district experienced continued disinvestment, and many stakeholders reported pessimism about future prospects.

During the period following that Worksession, the City of Berkeley implemented a number of activities to promote economic development in the district. The City Manager formed an inter-departmental team to address public safety, land use planning, and other issues that affect economic development. Additionally, Council adopted a number of land use policy modifications. These actions included:

- **Zoning modifications.** At the direction of the Council, staff has implemented a number of modifications to land use controls in an attempt to spur economic development in the district. These include an increase in the maximum allowed floor area ratio of new development projects, and reductions of restrictions on various uses (e.g., upper floor office uses, elimination of numerical limitations by business type). In addition, the City has designated the Telegraph district as a Priority Development Area, which confers eligibility for regional planning and infrastructure grants.
- **Technical assistance for commercial and real estate development projects.** Staff has provided focused assistance to property owners, prospective businesses, commercial brokers and other stakeholders in an attempt to facilitate catalytic commercial development projects.
- **Building capacity of Telegraph Business Improvement District (TBID).** Staff increased its participation in TBID and assisted with the organization's leadership transition and strategic planning process.
- **CPTED interventions.** An interagency staff team, including OED and Public Works, began implementing some recommendations in the Police Department's plan for crime prevention through environmental design (CPTED) in the district.

Demographic Summary

OED analyzed the American Community Survey data (2010-2014 rolling sample) for the eight census tracts that make up the Telegraph district and the surrounding area within approximately one mile of the commercial district (see Attachment 9 Demographic Summary). The area has experienced significant population growth over the past five years; the average annual population for 2010-2014 was 33,737, an increase of approximately 18% from the previous 5-year rolling sample (2005-2009). This new population consists largely of youth and young adults aged 15 to 24, indicating that an increase in the number of students in the area has driven much of the population growth.

The median household income for the demographics study area is \$65,731, roughly 7% lower than the City-wide figure (\$70,364). This reflects the higher concentration of students in the area. However, while many students report little or no income, they represent significant buying power, especially in the food services, household goods, and clothing categories.

ENVIRONMENTAL SUSTAINABILITY

Many of the City's environmental sustainability goals are inextricably tied to the overall health of the City's economy. The strong health of Berkeley's economy indicates that the City is well-positioned to pursue those goals. Furthermore, staff believes that the continued pursuit of environmental sustainability goals, as well as the programs and

public policies that encourage that pursuit, represents a core economic strength for Berkeley and a competitive advantage of the City and the region.

POSSIBLE FUTURE ACTION

In FY 2017 OED staff will continue to work with other City departments, Telegraph Business Improvement District, area merchants and vendors, UC Berkeley representatives, and other key community stakeholders to pursue economic development strategies that can boost economic performance in the district, as described above. Council may be presented with opportunities to adopt policies and programs that support these strategies, such as additional land use modifications, or applications for regional grants. Council will also likely be presented with the decision of whether to support the renewal of the Telegraph Property & Business Improvement District in the coming fiscal year.

FISCAL IMPACTS OF POSSIBLE FUTURE ACTION

Activities to support the Telegraph business district require the commitment of staff time. Actions that facilitate increased economic activity tend to boost revenues related to sales tax and property tax, and thus have positive fiscal impacts on the city. The potential renewal of the Telegraph Property & Business Improvement District would commit the City to continue for ten years its annual contribution of special property assessment. In FY 2017, the City's total assessment will be \$42,329, paid through the Off-Street Parking Fund (835-4942-410.40-46). That amount may change if TBID chooses to modify its assessment methodology.

CONTACT PERSON

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Attachments:

- 1: Telegraph Business District Map
- 2: Ground Floor Commercial Vacancy, 2008-2016
- 3: Development Pipeline Map
- 4: Sales Tax Revenue in the Telegraph District, 2006-2015
- 5: TBID Strategic Plan (Executive Summary)
- 6: Proposed TBID Expansion
- 7: Telegraph Public Art Plan
- 8: Telegraph Public Realm Plan
- 9: Demographics Summary