

Monday, April 15, 2024



BID Annual Reporting

The Business Development Division of the City of Oakland Economic and Workforce Development Department asks that you submit an Annual Report for the previous Calendar Year 2023 (CY23) - Jan 1, 2023 – Dec 31, 2023, and current Calendar Year (CY24). The information you submit via the following Annual Report will serve to summarize your BID’s programs and impacts for CY23, provide transparency regarding your organization’s sources and use of funds, and inform the City about updates to your Board and management team. The data you submit will also be used to generate aggregated information about the activities and impacts of our Business Improvement Districts in Oakland.

BID Name Oakland Chinatown Improvement Council

Contact Person and Information regarding Annual Reporting

This will not be shared publically, but rather needed for City of Oakland staff, in case of follow up questions or incomplete submissions

Name of person filling out the Annual Report Shu-yi Lin

Email shuyi.lin@ocic-ca.org

Phone Number (510) 988-8234

General Information & District Composition

Number of Full Time Equivelant paid staff members employed by your BID? (Including in-house and contracted) Please do not double-count staff members in multiple of the following categories.

	Number of FTE
General/Admin Staff	3
Cleaning Ambassadors/workers	3.3
Public Safety Officers/Security Ambassadors	1.8
Hospitality/Business Outreach Ambassadors	3.3
Other Seasonal/Part-time staff	0
Volunteers (not counting your board members)	200

Notes about staffing numbers

In 2023, the 3-year-old Chinatown District's dedicated team grew from a staff of 1 with 4 ambassadors in

January 2023 to a staff of 3 with 12 vendor personnel by December 2023. Throughout the year, in average, it has been led by a General/Administrative Staff of 3, including Cleaning Ambassadors/workers (3.3 FTE), Public Safety Officers/Security Ambassadors (1.78 FTE), and Hospitality/Business Outreach Ambassadors (3.3 FTE), ensuring cleanliness, safety, and hospitality to make Chinatown a welcoming place for all. Supported by 200 volunteers, they collaborate to maintain community safety, cleanliness, vibrancy, and unity in the district. They achieved milestones such as closing one Safety Patrol initiative and planning three major RFPs for 'Chinatown Clean and Safe' and vibrancy programming for the 2023 vendor transitions. They also facilitated 10 cleanup volunteer activations, coordinated 9 community events, and conducted 1 workshop, enhancing community cleanliness, safety awareness, and the success of Lunar New Year shopping season and holiday celebrations. The team successfully revived the Lunar New Year Parade after decades of hiatus.

Given Chinatown's historical lack of resources and access to workforce development, along with the highest long-term business property vacancy rate (2018 Oakland Equity Indicators Report), OCIC aims to initiate additional programs to align and attract more investment into the District. To further enhance their efforts in 2023, staff initiated a grant and sponsorship program focusing on local agency collaborations and regional partnerships. Projects include Chinatown's Food Waste Reduction Pilot, Lunar New Year Patrol Pilot, and a Summer Leadership Internship Pilot. Partners include the Alameda Waste Authority (Stop-Waste), City's Oakland Recycles Team, Pacific Coast Food Waste Commitment, Alameda County Sheriff's Office, Oakland Police Department, and City of Oakland (Mayor's office). Staff has also been prototyping a sponsorship program for the Lunar New Year Parade with local corporations. As the only Chinese-speaking member of the BID alliances, Chinatown has provided Chinese translations to make the BID Business Crime survey accessible to Chinese-speaking audiences in all districts. Looking ahead, at least 3 grants have been secured for 2024 - Safe City Grants, Neighborhood Voice, and Activate Oakland - to deepen local partnerships for initiatives such as security cameras, the parade, and AAPI night markets.

To ensure that the CBD stays connected to the pulse of the community, staff regularly post updates on social media and a dedicated listserv, addressing both BID and non-BID related matters, and communicating in at least two languages for operations. Additionally, staff advocate for and monitor 311 services, develop an educational business-centered recycling/compost website, and organize community volunteer trainer workshops for business waste awareness training. They also cross-post important information from agencies and the district to raise awareness among Chinatown Coalition partners via email lists and shared calendars.

How many parcels in your BID? 1116

Approximately how many residents in your BID? 2281

Approximately how many occupied storefronts in your district? 348

Approximately how many vacant storefronts in your district? 35

Cleaning

Does your BID provide any supplemental cleaning services?(If you are unsure which services qualify as supplemental cleaning, check "yes" to view the list.)

Yes

Is there a workforce development component to the hiring and/or training of your cleaning staff? (either in-house or with a partner organization)

Our vendor is the partner organization, Family Bridges

What types of work is done by your cleaning staff?

Sidewalk sweeping and clearing gutters

Power Washing

Graffiti removal - private property

Street furniture and trashcan maintenance and sanitization

Event-related Waste/recycling/compost sorting/collection

Illegal dumping removal

Activated volunteers with 10 cleanup events, by working with Toishan Benevolent Association, OCA east Bay, and Adopt-a-Spot

Cleaning Outputs & Operations

Yearly Cleaning outputs for Calendar Year 2023 by your BID: (total per year, NOT per week or month)

	Number per year
Number of incidents of graffiti removed	133
Number of bags of trash collected	2673
Pounds of trash collected (if you measure trash in pounds not bags)	146995
Number of Incidents of illegal dumping removed	315
Number of 311 requests made	276
Number of hours of pressure washing	1040
Number of stickers/posters removed	0

Which usernames, emails do you make 311 requests from? (please specify as many as you can)

ocic.webster@gmail.com and our vendor's emails (not available)

Number of days per week cleaning services are provided (1-7 days/wk)

6

Number of hours per week of cleaning services provided? (eg 40 hours, 120 hrs, etc)

132

Safety Services

Does your BID provide any supplemental safety services?(If you are unsure which services qualify as supplemental safety/hospitality, check "yes" to view the list.)

Yes

Is there a workforce development component to the hiring and/or training of your safety staff? (either in-house or with a partner organization)

Vendor is our partner organization: Family Bridges

What types of work is done by your safety staff?

Street patrol/ambassadors

Coordination with OPD

Hotline for visitors, merchants, residents to call to request immediate assistance

Walking safety escorts

Merchants could also request shop-closing safety watch at night.

Safety Outputs & Operations

Yearly Safety outputs for Calendar Year 2023 by your BID: (total per year, NOT per week or month)

	Number
Number of annual non-patrol hours dedicated by BID administrative staff and safety ambassadors/patrol to public safety program in 2023	13740
Number of annual patrol hours dedicated by public safety officers/ safety ambassadors hired by the BID to public safety program in 2023	4630
Number of merchant checks	4633
Number of 911 calls made by the BID	5
Number of non-emergency calls made by the BID	2
Number of security cameras installed by or in coordination with the BID as of Dec. 31, 2023	0
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies in 2023	0

	Number
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies prior to January 1, 2023 (if known)	0

Do you provide Safety patrol services throughout the year or just during the holidays/as needed?

Throughout the year

Regular schedule for Safety Patrol services

Day of the Week	Start Time	End Time
Monday	05:00 AM	05:00 AM
Tuesday	05:00 AM	05:00 AM
Wednesday	05:00 AM	05:00 AM
Thursday	05:00 AM	05:00 AM
Friday	05:00 AM	05:00 AM

Estimated number of security cameras to be installed by or in coordination with the BID in the District in 2024

26

Does your BID provide any supplemental streetscape/beautification services? (If you are unsure which services qualify as supplemental streetscape/beautification, check "yes" to view the list.)

No

Streetscape/Beautification Outputs & Operations

Does your BID provide any supplemental Marketing, Events and Communications services?(If you are unsure which services qualify as supplemental marketing, events and communications services, check "yes" to view the list.)

Yes

What types of marketing and communications work is done by your BID? (including contracted and in house work)

Print news advertising (e.g. EBX, East Bay times,)

Digital advertising (e.g. Oaklandside, Google, etc)

Social media posts (non-promoted)

Direct mailings

Flyers & posters

Email newsletters

Publish press releases

What types of Events and District Promotions work is done by your BID? (including contracted and in house work)

Produce BID events

Sponsor/in-kind support to events produced by businesses and non-BID entities in the District

Maintain Event calendar on BID website

Input (non-BID) events in District onto BID/Visit Oakland event calendar

Produce District Guides/maps (including digital or printed)

What types of social media platforms does your BID actively use?

Facebook

Instagram

WeChat

For each of the following platforms you actively use, how many subscribers/followers do you have?

	Number of subscribers/followers as of Dec 31, 2023	Number of posts/emails sent in 2023	Total Reach/opens in 2023	Total engagement/clicks in 2023
Email Distribution List	274	20	1644	1863
Facebook	213	70	48000	
Instagram	1267	49	33000	
Twitter	0	0	0	0
Tiktok	0	0	0	0
WhatsApp	0	0	0	0
YouTube	0	0	0	0

Average open rate for Emails in 2023: 30

Events and District Promotions Outputs & Operations

Events and District Promotions outputs for Calendar Year 2023 by your BID:

	Number
Number of events produced by the BID	1
Number of non-BID events in the District sponsored by BID or in-kind support provided by BID	9
Amount (\$\$) of Event sponsorship provided in 2023	18352
Number of attendees to events produced by or sponsored/supported by the BID (best estimate):	10000

Business Support

Does your BID provide any supplemental Business Support services?(If you are unsure which services qualify as supplemental Business Support services, check "yes" to view the list.)

Yes

What kinds of initiatives did your BID implement to support existing businesses in your district

Information Sessions on federal/state/city regulations or programs (e.g.)

Workshops & Trainings (e.g. financial management, marketing, accounting)

In-person Merchant outreach & contacts

Business Support Outputs & Operations

Business Support outputs for Calendar Year 2023 by your BID:

	Number
Number of merchant contacts	20
Number of business support events coordinated by or supported by the BID for your businesses in 2023	1
Annual total number of your business attendees to business support events coordinated by or supported by the BID	17

BID 2023 Accomplishments & Plans for 2024

Please list out the BID's top accomplishments from 2023, as well as note-worthy new projects, services and plans for 2024. This is your chance to brag about your BID's impact! List at least three, and up to ten for each year.

Top Accomplishments or New programs/activities accomplished in 2023

Accomplishment/New activity description
<p>1. A More Vibrant Chinatown: The Chinatown District successfully organized and revived the 1st Lunar New Year (LNY) parade after decades of hiatus, drawing significant community participation. They further secure funding for the 2024 collaboration with the City's Oakland Cultural Funding Program to support artists and performers in the 2024 LNY parade.</p>
<p>2. A Safer Chinatown: Closed a major District Safety Patrol initiative to enhance public safety and security within the district. The Mayor's office 'Shop Safe' initiative kicked off Chinatown's Vehicle Patrol to fill safety gaps between OPD and Ambassador coverages, providing a hotline for shop-closing security watch.</p>
<p>3. A Cleaner Chinatown: Collaborated with the City and existing Chinatown organizations to facilitate 10 cleanup volunteer activations and coordinate 9 community events to promote community engagement, environmental awareness, and vibrancy. Aligned media campaigns ensure a broader reach for the Greater Chinatown community to visit Oakland Chinatown and support locals. Additionally, provided educational outreach with a matching website for improved local business waste management based on business inputs.</p>
<p>4. Understanding Oakland District's Businesses with Language Accessibility: Working with other improvement districts, Chinatown provided Chinese translations for the BID Alliance + Business Crime survey chaired by KONO, ensuring accessibility for Chinese-speaking audiences across all Oakland BIDs.</p>
<p>5. Smooth Operations with Opportunities for Local Businesses: Planned and initiated three major District Requests for Proposals (RFPs) for 'Chinatown Clean and Safe' and parade programming, ensuring fair and open opportunities for local small businesses and smooth vendor transitions.</p>

New programs/activities planned for 2024 calendar year (that the BID didn't do in 2023)

New program/activity description
<p>1. Security Camera Initiatives: Collaborated with JLID and KONO on the Safe City Grant initiative to implement security camera programs, enhancing public safety and reducing crime rates.</p>
<p>2. A Summer Night Market to Support District Business: In addition to the District parade production and Lincoln Summer Night sponsorship, the District will organize an AAPI (Asian American and Pacific Islander) night market through the "Activate Oakland" grant, promoting local businesses and cultural diversity within the district. This initiative involves collaboration with the City's Workforce Development Department and Visit Oakland Tourism District.</p>

New program/activity description

3. District Newsletter Series: Implementing enhanced communication channels for the District audience to align District operations with community-centered news. This initiative may be integrated with current Chinese and Vietnamese language services and outreach efforts to further connect with the diverse community, ensuring inclusivity and accessibility.

4. Exploring Opportunities for District Beautification: The District is developing a proposal to secure funding from the District Identity and Civil Sidewalk Committees to lease 10 units enhanced with the OCIC logo and artistic designs, enriching our community's cultural vibrancy. Additionally, the District is actively monitoring grants for acquiring Big Belly trash cans, aiming to enhance our neighborhood's aesthetic and functionality through waste management and artistic initiatives.

BID Financials

2023 Budget versus Actuals

Provide a line-item detailed budget versus actuals document of your BID expenses and revenues from the 2023 (already completed) calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan.

Upload your BID's 2023 line-item detailed budget versus actuals document here:



OCIC Compliance Report 202... .pdf

Please provide the Surplus or Deficit amount from the previous calendar year of 2023 that was carried over into 2024. If there is a surplus, please describe your plans for how it will be spent (eg. Operational reserves, etc)

In 2023, OCIC set aside up to \$249,280 carryover from the reserves of 2022 surplus assessments to expand District programs beyond the income projected for 2023. The remaining surplus will continue to be retained in reserve for 2024 use.

2024 Budget

Provide a line-item detailed budget of projected expenses and revenues for the current calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan. The budget you provide should be approved by your Board of Directors upon time of submission. If not, please note the budget as draft and alert City staff to determine next steps.

Upload your BID's 2024 line-item detailed budget document here, as approved by your BID's Board of Directors:



Compliance Report 2024 Bud... .pdf

For the 2024 Calendar Year, please provide the estimated amounts and sources of any contributions to be made from sources other than BID assessments to be levied. Eg. donations, grant funding, etc.

Estimated Amount (\$)	Source of Contribution
50000	Local Corporations, City of Oakland Grants

Will the BID be requesting an annual assessment rate increase for the upcoming fiscal year of 2024/2025?

Yes

What is the proposed assessment increase for Fiscal Year 2024/2025?

5

Please provide the date of the board meeting when this assessment was approved, and describe how this decision was communicated to the BID members:

To ensure consistent service delivery following discussions among representatives of property owners, businesses, and community organizations, the majority of the Board approved a 5% increase in tax assessments for the upcoming fiscal year. This annual action item was discussed and approved at the OCIC Board of Directors meeting held on March 26, 2024. The meeting was attended by 23 members in person, with 6 abstentions, 2 nays, and 15 ayes, resulting in majority approval of the 5% assessment increase. Notices will be sent to all property owners within the District via First Class mail, as required by the Brown Act Section 54954.6, informing them of the approved increase.

What is the projected total assessment amount to be billed in this upcoming fiscal year of 2024/2025?

1351646.26

Board of Directors Roster 2023/2024 (list all directors that served anytime during 2023 or 2024)

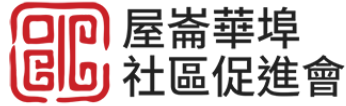
Name	Affiliation Type	Name of Affiliated Business/Org	Title	Status
Stewart Chen	Property Owner/Rep	Careplus Chiropractic Health	President	Current
Ann Fok	Property Owner/Rep	Chinatown Property Owner and Property Manager	Director	Current
Anderson Gin	Property Owner/Rep	Chinatown Property Owner, Local Elected Official	Director	Current
Hal Gin	Property Owner/Rep	Chinatown Property Owner	VP	Current

Name	Affiliation Type	Name of Affiliated Business/ Org	Title	Status
Josephine Hui	Property Owner/Rep	Oakland Chinese Community Services, OACC Volunteer, Toishan Benevolent Association Oakland Chinatown Patrol Team	Director	Current
Pauline Lam	Property Owner/Rep	Chinatown Property Owner	Director	Current
Carol Liao	Property Owner/Rep	Anrol International Inc.	Director	Current
Joe Ma	Property Owner/Rep	Toishan Benevolent Association	VP	Current
Bruce Ruan	Property Owner/Rep	Alameda Sherrif's Dept. & Toishan Association	Director	Current
Dong Suh	Property Owner/Rep	Asian Health Service	Treasurer	Current
Carol Liao	Property Owner/Rep	Anrol International Inc.	Treasurer	Past
Douglas Wong	Property Owner/Rep	Chinese American Citizens Alliance	VP	Current
Inger Li	Property Owner/Rep		Director	Current

Name	Affiliation Type	Name of Affiliated Business/ Org	Title	Status
Ener Chiu	Property Owner/Rep	EBLDC	Director	Current
Howard Lee	Property Owner/Rep		Director	Current
Michael Yim	Property Owner/Rep		Secretary	Current
Tim Chan	Property Owner/Rep	BART	Director	Current
Jabari Jourdan Ali	Community Member/Rep		Director	Current
Sky Liang	Community Member/Rep	Asian Pacific Environmental Network	Director	Current
Elaine Peng	Community Member/Rep	Mental Health Association for Chinese Communities	Director	Current
Elaine Peng	Community Member/Rep	Mental Health Association for Chinese Communities	VP	Past
Joshua Simon	Community Member/Rep	East Bay Asian Local Development Corporation	Director	Current
Kenneth Tang	Community Member/Rep	Asian Pacific Environmental Network	Director	Current

Name	Affiliation Type	Name of Affiliated Business/ Org	Title	Status
Kenneth Tang	Community Member/ Rep	Asian Pacific Environmental Network	Secretary	Past
Lisa Liu	Community Member/ Rep	Mental Health Association for Chinese Communities	Director	Current
Sandra Ue	Community Member/ Rep		Director	Current
Lindsay Young	Community Member/ Rep	Oakland Museum of CA	Director	Current
Rick Da Silva	Property Owner/Rep	Wellington Property Company	Director	Past
Kam Davis	Property Owner/Rep		Director	Past
Corinne Jan	Property Owner/Rep	Family Bridges	Director	Past
Irene Ko	Property Owner/Rep	Chinese Medicine & Acupressure Center	Director	Past
Saly Lee	Community Member/ Rep	OACC	Director	Past
Michael Moon	Community Member/ Rep	OCA East Bay	Director	Past
Yvette Mccoy	Community Member/ Rep	BART	Director	Past
Jimmy Zhao	Property Owner/R	Chao's Rosewoo	Director	Past

	ep	d Furniture		
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2023 District Financials: In 2023, the Chinatown District shifted the fiscal year (FY) to end in December instead of November. This transition resulted in FY 2023 spanning 13 months. The 13-month figures are interim estimates that will be finalized by November 2024 through accounting reconciliations.

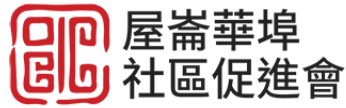
Please find overview revenue and expenses (Table 1) and line-item detailed budget versus actuals from FY 2023 (Table 2)Table 1.

Table 1. Overview of Chinatown District’s 2023 Revenues and Expenses

Income	General Benefits per Management Plan	Projected	Actuals
Assessment - Special Benefits		\$1,441,708	\$1,258,814
2023 Disbursement		\$1,185,849	\$1,185,849
Contingency Draw from Reserve: Use 2022 surplus carryovers as needed		\$249,280	\$66,386
Investments Interest		\$6,579	\$6,579
Non-Assessment		\$83,800	\$83,800
Donation + 2022 carryover		\$46,800	\$46,800
Management Plan - General Benefits (2% Assessment)	\$23,717	2.4%	2.8%
Shop Safe Grant		\$20,000	\$20,000
WWF Grant		\$17,000	\$17,000
District Total Income		\$1,525,508	\$1,342,614

Expense	Assessment Allocation	Budget (13 Month)	Actuals (13 Month)
Management Plan - Administration and contingency (20%)	\$288,342	20.3%	22.9%
Total Administration		\$310,280	\$349,452
Management Plan - Civil Sidewalks (66%)	\$951,527	64.1%	58.0%
Total Civil Sidewalks		\$977,228	\$884,057
Management Plan - District Identity & Placemaking (14%)	\$201,839	15.6%	7.2%
Total Identity & Placemaking		\$238,000	\$109,105
District Total Expense	\$1,441,708	\$1,525,508	\$1,342,614

2023 Surplus or Deficit	Actual Income- Expense	\$0
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Oakland Chinatown
Improvement Council

Table 2. Chinatown District's 2023 line-item detailed budget versus actuals

Expense	Assessment Allocation	Budget (13 Month)	Actuals (13 Month)
Management Plan - Administration and contingency (20%)	\$288,342	20.3%	22.9%
Accounting Fees		\$12,000	\$13,300
Annual tax return		\$2,000	
Bank Charges		\$200	\$40
Board meeting		\$2,400	\$8,751
Board meeting Interpreters /Translator		\$7,200	\$552
Depreciation and Amortization - Allowable		\$2,000	\$3,308
Insurance - Liability, Directors and Officers		\$10,000	\$8,159
Job Posting		\$1,500	\$807
Legal Fees		\$6,000	\$6,380
License and Fee		\$300	\$70
Office Expenses		\$800	\$8,369
Office Equipments		\$5,000	
Meals and Entertainments		\$1,000	\$220
Office Rent		\$36,000	\$45,060
Utilities (Prepaid)		\$10,000	\$21,647
Postage, Mailing Service		\$1,000	\$666
Printing and Copying		\$1,500	\$2,961
Staff and Directors development		\$10,000	\$10,221
Telecom Expense		\$7,500	\$9,515
Professional Services			\$6,641
Total Staff Administration (2.1 FTE)			\$169,199
Payroll Fees		\$300	\$744
Payroll Tax		\$15,000	\$18,546
Outside Contract Services			\$2,820
Internship			\$2,000
Contributions			\$5,742
Donation			\$2,000
Miscellaneous			\$1,023
Contingency		\$14,500	\$20,000
Total Administration		\$310,280	\$349,452

Expense	Assessment Allocation	Budget (13 Month)	Actuals (13 Month)
Management Plan - Civil Sidewalks (66%)	\$951,527	64.1%	58.0%
Clean & Safe Ambassador Service		\$813,228	\$782,253
DLSC (Security Patrol Services)			\$294,253
Contract		\$126,796	
Extension		\$257,057	
City of Oakland Shop-Safe Services		\$20,000	
Family Bridges (Ambassador Services)			\$487,500
Contract		\$284,375	
Extension		\$125,000	
Clean & Safe Ambassador Service - Other			\$500
Committee Meetings		\$10,000	\$2,646
Equipment for Patrols and Ambassadors		\$10,000	
Program Coordinator (0.9 FTE)		\$97,500	\$82,210
WWF: Chinatown's Food Waste Reduction Pilot			\$16,948
Branded Vests		\$2,500	
Contingency for Hiring of Executive Director		\$44,000	
Total Civil Sidewalks		\$977,228	\$884,057
Management Plan - District Identity & Placemaking (14%)	\$201,839	15.6%	7.2%
District Identity Projects			\$1,585
Lincoln Summer Festival		\$18,000	\$15,352
Winter Festival, Lunar NY parade, etc		\$103,000	\$90,184
Lighting Program Planning		\$10,000	
Lighting Program Implementation		\$50,000	
District Identity Planning and Signage		\$10,000	
OCIC Outreach/Event Promotion and Sponsorship		\$28,600	
Website/Social Media		\$5,000	\$283
Chinatown Trash Bin Beautification		\$5,000	
Contingency		\$8,400	
Miscellaneous			\$1,511
Operation expense/Admin. Fees			\$190
Total Identity & Placemaking		\$238,000	\$109,105
District Total Expense	\$1,441,708	\$1,525,508	\$1,342,614



2024 District Budget: Please find 2024 budget approved (Table 3) by Oakland Chinatown Improvement Council (OCIC) Board on January 30th 2024, with additional non-assessment income estimated in February 2024.

Table 3. Chinatown District’s 2024 Budget approved by OCIC Board of Directors, with detailed line items

A. District Revenue from Assessment and Non Assessment income

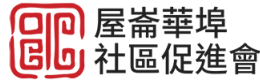
Revenue Line Items	Income
Assessment Income	\$1,245,141.75
Non-Assessment Income	\$50,000.00
City of Oakland Grant Neighborhood Voices: 2/18/23	\$13,000.00
City of Oakland Grant: Activate Oakland 5/10/2024	\$9,000.00
DoorDash Grants 2023/2024	\$5,000.00
Sutter Health	\$10,000.00
MHACC	\$3,000.00
Bank of Orient	\$5,000.00
California Waste Solutions	\$5,000.00
District Total Income	\$1,295,141.75

B. District Expense by Special Benefits per Management Plan

Expense Line Items	Expense
Administration (15%) Allocation	\$186,875.57
Administration Contingency	\$11,016.37
Accounting Fee	\$15,000.00
Annual tax return	\$2,000.00
Bank Charges	\$200.00
Board meeting Interpreters / Translator	\$6,300.00
Depr and Amort	\$2,000.00
Insurance-Liability Directors and Officers	\$6,000.00
Job posting	\$0.00
Legal Fees	\$6,243.78
License and Fees	\$300.00
Office Expenses	\$1,000.00
Office Equipments	\$1,500.00



Expense Line Items	Expense
Office furnitures	\$0.00
Office Rent	\$36,000.00
Office Utilities	\$12,300.00
Postage, Mailing Service	\$1,000.00
Printing and Copying	\$1,500.00
Staff Development	\$10,000.00
Board Retreat 1/3	\$3,333.33
TeleCom Expense	\$7,500.00
Executive Director 1/4	\$46,000.00
Administration 1/6	\$14,806.51
Operational Manager 1/6	\$16,091.95
Administrative Expense Total	\$197,891.93
Civil Sidewalks (66%)+ Contingency* (3%) Allocation	\$862,561.05
Family Bridges Extension Ending Jan 31, 2024	\$40,625.00
Regular Powerwashing 3 to 4 block face per year	\$66,000.00
DLS Corp Approved (Prorated 1/1/24 to 2/28/24)	\$21,390.00
Meeting costs, including translation and interpretation, and other related expenses	\$3,000.00
\$500K start date Feb 1, 2024	\$458,333.00
ED Participation in Safety Programs/Coordination with OPD/Key Stakeholders 1/2	\$92,000.00
Program Coordination - 311, OakDot, Public Works, Grant Writing, City of Oakland 1/6	\$16,091.95
Administrative Support - Oversee Civil Sidewalk Invoices/Community Updates 4/6	\$59,226.03
Board Retreat / Strategic Planning	\$3,333.33
Software CRM - Ambassadors/PBID Manager	\$10,000.00
Public Right of Way- Locks, Graffiti Abatement, Facade Support, Trash Cans, Bird Netting	\$51,643.48
Contingency*	\$40,917.93
Civil Sidewalks Expense Total	\$862,561.05
District Identity and Placemaking (14%) + Contingency* (1%) Allocation	\$184,688.77



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Expense Line Items	Expense
The inaugural Oakland Chinatown Lunar New Year Parade 2/18/2024	\$51,897.73
Oakland Chinatown Night Market - 5/10	\$9,000.00
Community Events: Lincoln Summer Nights	\$10,000.00
OPD Appreciation	\$500.00
OPD Appreciation	\$500.00
AYSC Scholarship	\$1,000.00
Christmas Toy Drive	\$1,000.00
District 3 - Alameda County Support	\$400.00
District 3 - Alameda County Support	\$191.83
District 3 - Alameda County Support	\$300.00
Lions Club - Health Fair	\$2,500.00
API Peace Officer	\$800.00
OACC GALA	\$1,050.00
OACC's Anniversary Dinner	\$1,000.00
OAPOA - Annual Holiday Party	\$600.00
OCCC Street Fests	\$1,200.00
OACC Street Fest. Lunch for Director	\$129.97
2024 Wa Sung Directory	\$420.00
Mayor Community / Wa Sung	\$1,000.00
Socially Responsible Network	\$2,000.00
Sponsored Alameda D5 Board of Supervisors	\$675.25
MISC DIP Projects	\$9,000.00
Executive Director 1/4	\$46,000.00
Operational Support (Grant Writing, Lunar New Year Planning, OCC / Summer Nights Coordination) 2/3	\$64,367.79
Accounting Administration (Social Media/Website Updating/Marketing/Accounting) 1/6	\$14,806.51
Board Development	\$3,333.33
Contingency*	\$11,016.37
District Identity and Placemaking Expense Total	\$234,688.77
District Total Expense	\$1,295,141.75



BID Annual Reporting

The Business Development Division of the City of Oakland Economic and Workforce Development Department asks that you submit an Annual Report for the previous Calendar Year 2023 (CY23) - Jan 1, 2023 – Dec 31, 2023, and current Calendar Year (CY24). The information you submit via the following Annual Report will serve to summarize your BID’s programs and impacts for CY23, provide transparency regarding your organization’s sources and use of funds, and inform the City about updates to your Board and management team. The data you submit will also be used to generate aggregated information about the activities and impacts of our Business Improvement Districts in Oakland.

BID Name Downtown Oakland Association

Contact Person and Information regarding Annual Reporting

This will not be shared publically, but rather needed for City of Oakland staff, in case of follow up questions or incomplete submissions

Name of person filling out the Annual Report Tori Decker

Email tori@downtownoakland.org

Phone Number (510) 213-1530

General Information & District Composition

Number of Full Time Equivelant paid staff members employed by your BID? (Including in-house and contracted) Please do not double-count staff members in multiple of the following categories.

	Number of FTE
General/Admin Staff	3
Cleaning Ambassadors/workers	7.125
Public Safety Officers/Security Ambassadors	0
Hospitality/Business Outreach Ambassadors	7.125
Other Seasonal/Part-time staff	0
Volunteers (not counting your board members)	0

Notes about staffing numbers

Our ambassador program is cleaning and hospitality-focused; all staff members serve in both capacities.

They clean during the first half of each shift and then return their mega-brutes to base and head back out to work to make business contacts and engage more with the public. I have divided the hours between cleaning and hospitality accordingly.

How many parcels in your BID? 884

Approximately how many residents in your BID? 918

Approximately how many occupied storefronts in your district? 573

Approximately how many vacant storefronts in your district? 36

Cleaning

Does your BID provide any supplemental cleaning services?(If you are unsure which services qualify as supplemental cleaning, check "yes" to view the list.)

Yes

Is there a workforce development component to the hiring and/or training of your cleaning staff? (either in-house or with a partner organization)

CROP, CEO

What types of work is done by your cleaning staff?

Sidewalk sweeping and clearing gutters

Power Washing

Graffiti removal - public property

Graffiti removal - private property

Gum, sticker and Flyer Removal

Street furniture and trashcan maintenance and sanitization

Landscaping services and plant watering

Event-related Waste/recycling/compost sorting/collection

Illegal dumping removal

Cleaning Outputs & Operations

Yearly Cleaning outputs for Calendar Year 2023 by your BID: (total per year, NOT per week or month)

	Number per year
Number of incidents of graffiti removed	49656
Number of bags of trash collected	0
Pounds of trash collected (if you measure trash in pounds not bags)	234670
Number of Incidents of illegal dumping removed	4378
Number of 311 requests made	503
Number of hours of pressure washing	216
Number of stickers/posters removed	8771

Which usernames, emails do you make 311 requests from? (please specify as many as you can)

charles@downtownoakland.org; dispatch2400@icloud.com

Number of days per week cleaning services are provided (1-7 days/wk)

7

Number of hours per week of cleaning services provided? (eg 40 hours, 120 hrs, etc)

300

Safety Services

Does your BID provide any supplemental safety services?(If you are unsure which services qualify as supplemental safety/hospitality, check "yes" to view the list.)

Yes

Is there a workforce development component to the hiring and/or training of your safety staff? (either in-house or with a partner organization)

No

What types of work is done by your safety staff?

Monitoring security cameras

Street patrol/ambassadors

Coordination with OPD

Hotline for visitors, merchants, residents to call to request immediate assistance

Walking safety escorts

Safety Outputs & Operations

Yearly Safety outputs for Calendar Year 2023 by your BID: (total per year, NOT per week or month)

	Number
Number of annual non-patrol hours dedicated by BID administrative staff and safety ambassadors/patrol to public safety program in 2023	1000
Number of annual patrol hours dedicated by public safety officers/ safety ambassadors hired by the BID to public safety program in 2023	15600
Number of merchant checks	39510
Number of 911 calls made by the BID	0
Number of non-emergency calls made by the BID	0
Number of security cameras installed by or in coordination with the BID as of Dec. 31, 2023	122
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies in 2023	11
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies prior to January 1, 2023 (if known)	0

Do you provide Safety patrol services throughout the year or just during the holidays/as needed?

Throughout the year

Regular schedule for Safety Patrol services

Day of the Week	Start Time	End Time
Monday	07:00 AM	11:00 PM
Tuesday	07:00 AM	11:00 PM
Wednesday	07:00 AM	11:00 PM
Thursday	07:00 AM	11:00 PM
Friday	07:00 AM	11:00 PM
Saturday	07:00 AM	11:00 PM
Sunday	07:00 AM	11:00 PM

Estimated number of security cameras to be installed by or in coordination with the BID in the District in 2024

116

Does your BID provide any supplemental streetscape/beautification services? (If you are unsure which services qualify as supplemental streetscape/beautification, check "yes" to view the list.)

Yes

What types of streetscape/beautification work is done by your BID? (including contracted and in house work)

Install/maintain planters and/or hanging baskets

Install / mantain banners on street/light poles

Install/maintain Big Belly trashcans

Install/maintain public plazas

Install/maintain public art pieces

Streetscape/Beautification Outputs & Operations

Streetscape/Beautification outputs for Calendar Year 2023 by your BID:

	Number
Number of planters and/or hanging baskets installed and maintained	77
Number of tree wells maintained	0
Number of banners on street/light poles installed/mantained	60
Number of pedestrian-oriented lighting elements (including stand-alone light poles and lights on private buildings that illuminate the public right of way) installed	0
Number of Big Belly trashcans Installed and maintained	5
Number of public plazas installed/maintained	3
Number of public art pieces installed/maintained	10

Does your BID provide any supplemental Marketing, Events and Communications services?(If you are unsure which services qualify as supplemental marketing, events and communications services, check "yes" to view the list.)

Yes

What types of marketing and communications work is done by your BID? (including contracted and in house work)

Print news advertising (e.g. EBX, East Bay times,)

Digital advertising (e.g. Oaklandside, Google, etc)

Social media advertising (eg. promoted posts and/or Facebook, Instagram ads campaigns, partnering with influencers)

Social media posts (non-promoted)

Direct mailings

Flyers & posters

Email newsletters

What types of Events and District Promotions work is done by your BID? (including contracted and in house work)

Produce BID events

Sponsor/in-kind support to events produced by businesses and non-BID entities in the District

Maintain Event calendar on BID website

What types of social media platforms does your BID actively use?

Facebook

Instagram

YouTube

TikTok

For each of the following platforms you actively use, how many subscribers/followers do you have?

	Number of subscribers/followers as of Dec 31, 2023	Number of posts/emails sent in 2023	Total Reach/opens in 2023	Total engagement/clicks in 2023
Email Distribution List	2760	70	26668	1310
Facebook	8613	206	96937	1210
Instagram	3383	548	103200	2500
Twitter	0	0	0	0
Tiktok	94	0	0	893
WhatsApp	0	0	0	0
YouTube	99	94	0	0

Average open rate for Emails in 2023: 41

Events and District Promotions Outputs & Operations

Events and District Promotions outputs for Calendar Year 2023 by your BID:

	Number
Number of events produced by the BID	71
Number of non-BID events in the District sponsored by BID or in-kind support provided by BID	7
Amount (\$\$) of Event sponsorship provided in 2023	42350.00
Number of attendees to events produced by or sponsored/supported by the BID (best estimate):	400

Business Support

Does your BID provide any supplemental Business Support services?(If you are unsure which services qualify as supplemental Business Support services, check "yes" to view the list.)

Yes

What kinds of initiatives did your BID implement to support existing businesses in your district

Social Events (e.g. networking events, meet & greets, sector meet-ups)

In-person Merchant outreach & contacts

Oakland Works Wednesdays small business support initiative

Business Support Outputs & Operations

Business Support outputs for Calendar Year 2023 by your BID:

	Number
Number of merchant contacts	39510
Number of business support events coordinated by or supported by the BID for your businesses in 2023	0
Annual total number of your business attendees to business support events coordinated by or supported by the BID	0

BID 2023 Accomplishments & Plans for 2024

Please list out the BID's top accomplishments from 2023, as well as note-worthy new projects, services and plans for 2024. This is your chance to brag about your BID's impact! List at least three, and up to ten for each year.

Top Accomplishments or New programs/activities accomplished in 2023

Accomplishment/New activity description

Oakland Works Wednesdays - 2023 Summary The story of OWW is one of direct engagement and connections. This new initiative has opened doors into our community in a fresh and dynamic way. We are connecting and showcasing our small storefront businesses with the office employee communities and the residential communities; developing and curating an ecosystem of mutually beneficial relationships. In addition to cultivating connections and highlighting our robust community of entrepreneurs and innovators, we are integrating the activation of public spaces to add to the vibrancy of our neighborhood. Our AMP partnership with the Oakland School for the Arts, showcasing the amazing talent of our youth to our downtown employees, residents, and visitors, is a prime example of the abundance and deep roots our organization has developed over the years. Wednesday is the tip of the iceberg. By focusing on Wednesdays, a day we found in preliminary surveys as the most busy day at corporate offices, we believe to show proof of concept that the energy and desire is here to bring back the vibrancy downtown had prior to the pandemic. The culmination of this effort is to uplift all enterprises, to highlight what is here, and help imagine what could be. Together we will activate, elevate, and celebrate our vibrant community. In mid-July of 2023 the Uptown Downtown Oakland Community Benefit Districts partnered with Aitan Mizrahi to move forward with the Oakland Works Wednesdays initiative. The initiative, originally conceived of by Cortt Dunlap of Awaken Cafe & Roasting in the Spring of 2023, had slowed down from the initial push due to lack of capacity by the stakeholders. The hiring of Aitan as coordinator reinvigorated this project, providing a dedicated individual to hit the streets and meet face-to-face with local businesses. This strategy has proven effective based on the number of ground-floor businesses, corporate offices, and residential complexes participating. In addition to connecting these key stakeholders, The Oakland School for the Arts students have put on five performances so far and are scheduled to perform twice a month, through May 2024, activating public space and enhancing the overall experience for our downtown community. Notable Successes Storefront Retail We are asking our ground floor businesses to join us in this initiative by: Registering on the website and adding their information to our directory Offering a special to their customers on Wednesdays Post the window cling on their storefront In exchange for participating we offer: Placement on the website and map Direct engagement Regular digital emails with highlights and strategies to maximize the impact Publicity on our social media platforms Of the 140 businesses approached to participate in the initiative, 79 have signed up to be featured on the website. Of those, 56 are offering discounts (70%), and 49 have window clings. Residential 9 residential buildings are spreading the word to their tenants by posting physical flyers in the common spaces and sharing our message via internal communications and their social media platforms. Corporate Offices Our corporate partners are also sharing the message with their teams and are looking forward to more opportunities to share with their employees. Public Space Activation We are proud of our partnership with OSA in activating the downtown public

space. When the weather permits they set up at Latham Square and if it rains they end up at Awaken Cafe. So far, we've had six performances ranging from big bands to duets to poetry readings. Local Economy The OakCentric eGift Card is a strategy to connect the consumer with our retail. Keeping the dollars local maximizes the impact. The card is purchased online and can be used at participating businesses. Summary The story of OWW is one of direct engagement and connections. This new initiative has opened doors into our community in a fresh and dynamic way. We are connecting and showcasing our small storefront businesses with the office employee communities and the residential communities; developing and curating an ecosystem of mutually beneficial relationships. In addition to cultivating connections and highlighting our robust community of entrepreneurs and innovators, we are integrating the activation of public spaces to add to the vibrancy of our neighborhood. Our AMP partnership with the Oakland School for the Arts, showcasing the amazing talent of our youth to our downtown employees, residents, and visitors, is a prime example of the abundance and deep roots our organization has developed over the years. Wednesday is the tip of the iceberg. By focusing on Wednesdays, a day we found in preliminary surveys as the most busy day at corporate offices, we believe to show proof of concept that the energy and desire is here to bring back the vibrancy downtown had prior to the pandemic. The culmination of this effort is to uplift all enterprises, to highlight what is here, and help imagine what could be. Together we will activate, elevate, and celebrate our vibrant community.

Vendor Transition from National clean and safe services provider, Block by Block, to Oakland-based, District Works. Their values align with those of the district with a focus on placemaking and community building and they embody an employee-first model.

n/a

New programs/activities planned for 2024 calendar year (that the BID didn't do in 2023)

New program/activity description
Activate Frank Ogawa Plaza using grant funds from the City of Oakland
Muralists of Oakland Film Screening - featuring the works of 6 talented muralists and their impact on our downtown.
Locals' Night Out Bar Crawl(s) - small business support initiative.

BID Financials

2023 Budget versus Actuals

Provide a line-item detailed budget versus actuals document of your BID expenses and revenues from the 2023 (already completed) calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan.

Upload your BID's 2023 line-item detailed budget versus actuals document here:



Please provide the Surplus or Deficit amount from the previous calendar year of 2023 that was carried over into 2024. If there is a surplus, please describe your plans for how it will be spent (eg. Operational reserves, etc)

We carried forward \$134,019.76 from 2023 into 2024 - a combination of expense category underspend and reserve funds. Those carry-forward dollars were plugged into the 2024 operating budget as a reserve and distributed according to our prescribed percentage allocations into Clean and Safe Enhancements and Marketing and Administrative Enhancement budget line items.

2024 Budget

Provide a line-item detailed budget of projected expenses and revenues for the current calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan. The budget you provide should be approved by your Board of Directors upon time of submission. If not, please note the budget as draft and alert City staff to determine next steps.

Upload your BID's 2024 line-item detailed budget document here, as approved by your BID's Board of Directors:



For the 2024 Calendar Year, please provide the estimated amounts and sources of any contributions to be made from sources other than BID assessments to be levied. Eg. donations, grant funding, etc.

Estimated Amount (\$)	Source of Contribution
313000	Additional Service Contracts
100000	grant funding

Will the BID be requesting an annual assessment rate increase for the upcoming fiscal year of 2024/2025?

Yes

What is the proposed assessment increase for Fiscal Year 2024/2025?

5

Please provide the date of the board meeting when this assessment was approved, and describe how this decision was communicated to the BID members:

The 5% annual assessment increase was discussed and approved at the March 13, 2024 DOA board meeting. Prior to that meeting, a postcard was mailed to all affected stakeholders alerting them to the discussion of said increase on March 13 and directing them to a letter on our website detailing the justification. The postcard was mailed out on February 23, 2024, in both English and Cantonese.

What is the projected total assessment amount to be billed in this upcoming fiscal year of 2024/2025?

2576421.62

Board of Directors Roster 2023/2024
(list all directors that served anytime during 2023 or 2024)

Name	Affiliation Type	Name of Affiliated Business/Org	Title	Status
Mike Guerra	Property Owner/Rep	Lincoln University	President	Current
Jamie Flaherty-Evans	Business Owner/Rep	Chromta Retail	VP	Current
Carmen Benjamin	Property Owner/Rep	City Center	Secretary	Current
Courtney Belanger	Property Owner/Rep	Shorenstein	Director	Current
Kurtis Hanson	Property Owner/Rep	Oakland Marriott	Director	Current
Greg Pasquali	Property Owner/Rep	Carmel Partners	Director	Current
William Goodman	Property Owner/Rep	Strada Investment Group	Director	Current
Adam Chall	Property Owner/Rep	TMG Partners	Director	Current
Durell Coleman	Community Member/Rep	17th and Broadway Resident/Sobre Mesa	Director	Current
Mark Morell	Property Owner/Rep	Oakland Marriott	Director	Past
Matt Klimerman	Property Owner/Rep	Tidewater Capital	Director	Current
Tamira Twile	Property Owner/Rep	STB/City Center	Director	Current
Cortt Dunlap	Business Owner/Rep	Awaken Cafe	Director	Current

Name	Affiliation Type	Name of Affiliated Business/ Org	Title	Status
Felicia Scruggs	Property Owner/Rep	EBALDC	Director	Past

Downtown Oakland Association
Budget vs. Actuals: DOA 2023 Operating Budget - FY23 P&L
January - December 2023

	Actual	Budget
Income		
Assessment Revenue	2,240,250.10	2,290,720.00
(Reserve)	0.00	-85,477.75
Prior Year Bal - Carry Forward	0.00	266,847.75
Total Assessment Revenue	\$ 2,240,250.10	\$ 2,472,090.00
Total Income	\$ 2,240,250.10	\$ 2,472,090.00
Gross Profit	\$ 2,240,250.10	\$ 2,472,090.00
Expenses		
Clean and Safe Enhancements	0.00	0.00
Clean and Safe	1,450,961.92	1,475,687.00
Misc.	2,506.16	5,000.00
Outreach Coordinator	17,000.42	20,000.00
Program Coordinator	71,016.00	71,016.00
Program Director	87,305.00	87,305.00
PROW Maintenance	181,456.07	198,247.00
Total Clean and Safe Enhancements	\$ 1,810,245.57	\$ 1,857,255.00
Marketing and Economic Enhance.	0.00	0.00
Accounting Expenses	14,738.50	15,100.00
Annual Stakeholder Event	0.00	5,250.00
Computer Service & Support	327.74	3,000.00
Consulting and Legal Expenses	0.00	1,500.00
Digital Media Coordinator	49,309.41	53,344.00
Fees & Permits	569.27	6,000.00
Insurance	0.00	0.00
Directors & Officers	600.00	600.00
General Liability	3,153.00	3,153.00
Total Insurance	\$ 3,753.00	\$ 3,753.00
Marketing and Communications	30,635.55	42,500.00
Misc	4,867.28	5,100.00
Office furniture & equipment	4,566.41	6,500.00
Postage, shipping, delivery	566.08	1,000.00
Printing & copying	3,071.95	3,000.00
Public Space Programming	92,201.45	115,000.00
Rent	73,568.37	72,500.00
Staff Personnel	267,287.60	267,288.00
Supplies	2,104.20	2,500.00
Telephone & telecommunications	3,123.20	3,000.00
Training & Prof. Development	12,142.51	8,500.00
Total Marketing and Economic Enhance.	\$ 562,832.52	\$ 614,835.00
Total Expenses	\$ 2,373,078.09	\$ 2,472,090.00

2024 DOA Operating Budget

	2024	
	Budget	Notes
Income		
Assessment Revenue (96% collection)	2,355,586.00	
(Reserve)	-70,541.36	3% of anticipated collection.
Prior Year Carry Forward	134,019.76	Includes remaining Reserve and anticipated expense category underspend.
Total Assessment Revenue	\$ 2,419,064.40	
Total Income	\$ 2,419,064.40	
Expenses		
Clean and Safe Enhancements		
Clean and Safe	1,518,169.00	Incorporates a 3% increase to maintain current service levels.
Misc.	5,000.00	
Program Coordinator	73,200.00	Incorporates 3% increase and COE increase inclusive of additional employee benefits.
Program Director	89,924.00	Incorporates a 3% increase and COE increase inclusive of additional employee benefits.
Outreach Coordinator	15,000.00	
PROW Maintenance	161,872.40	Allocation based on anticipated need. Includes monthly cost for Advanced Reporting Platform.
Total Clean and Safe Enhancements	\$ 1,863,165.40	
Accounting Expenses	5,000.00	Includes tax preparation and Bill.com processing fees.
Annual Stakeholder Event	5,250.00	We are going to make this happen in 2024!!
Computer Service & Support	1,500.00	
Consulting and Legal Expenses	500.00	
Digital Media Coordinator and Support	52,599.00	Incorporates 3% increase and COE increase inclusive of additional employee benefits.
Memberships, Fees & Permits	3,000.00	
Insurance		
Directors & Officers	600.00	
General Liability	3,193.00	
Marketing and Communications	35,000.00	
Misc.	5,100.00	
Office furniture & equipment	6,500.00	
Postage, shipping, delivery	1,000.00	
Printing & copying	3,100.00	
Public Space Programming	70,000.00	
Rent	72,500.00	Best guess with information at hand - will keep everyone apprised as things develop.
Staff Personnel	275,307.00	Incorporates 3% increase and COE increase inclusive of additional employee benefits.
Supplies	2,500.00	
Telephone & Internet	3,250.00	Increase due to wifi upgrade in ambassador suite.
Staff and Board Development	10,000.00	Allocation based on anticipated need.
Total Marketing and Economic Enhancements	\$ 555,899.00	
Total Expenses	\$ 2,419,064.40	

0.00



Monday, April 15, 2024

BID Annual Reporting

The Business Development Division of the City of Oakland Economic and Workforce Development Department asks that you submit an Annual Report for the previous Calendar Year 2023 (CY23) - Jan 1, 2023 – Dec 31, 2023, and current Calendar Year (CY24). The information you submit via the following Annual Report will serve to summarize your BID’s programs and impacts for CY23, provide transparency regarding your organization’s sources and use of funds, and inform the City about updates to your Board and management team. The data you submit will also be used to generate aggregated information about the activities and impacts of our Business Improvement Districts in Oakland.

BID Name Jack London Improvement District

Contact Person and Information regarding Annual Reporting

This will not be shared publically, but rather needed for City of Oakland staff, in case of follow up questions or incomplete submissions

Name of person filling out the Annual Report Savlan Hauser

Email savlan@jacklondonoakland.org

Phone Number (510) 388-4412

General Information & District Composition

Number of Full Time Equivelant paid staff members employed by your BID? (Including in-house and contracted) Please do not double-count staff members in multiple of the following categories.

	Number of FTE
General/Admin Staff	3
Cleaning Ambassadors/workers	10
Public Safety Officers/Security Ambassadors	1
Hospitality/Business Outreach Ambassadors	1
Other Seasonal/Part-time staff	0
Volunteers (not counting your board members)	6

How many parcels in your BID? 1449

Approximately how many residents in your BID? 4500

Approximately how many occupied storefronts in your district? 86

Approximately how many vacant storefronts in your district? 14

Cleaning

Does your BID provide any supplemental cleaning services?(If you are unsure which services qualify as supplemental cleaning, check "yes" to view the list.)

Yes

Is there a workforce development component to the hiring and/or training of your cleaning staff? (either in-house or with a partner organization)

In-house, and in addition have worked with Downtown Streets Team, Swords to Ploughshares

What types of work is done by your cleaning staff?

Sidewalk sweeping and clearing gutters

Power Washing

Graffiti removal - public property

Graffiti removal - private property

Gum, sticker and Flyer Removal

Street furniture and trashcan maintenance and sanitization

Landscaping services and plant watering

Event-related Waste/recycling/compost sorting/collection

Illegal dumping removal

Wayfinding and safety signage installation and maintenance

Cleaning Outputs & Operations

Yearly Cleaning outputs for Calendar Year 2023 by your BID: (total per year, NOT per week or month)

	Number per year
Number of incidents of graffiti removed	4441

	Number per year
Number of bags of trash collected	7868
Pounds of trash collected (if you measure trash in pounds not bags)	196718
Number of Incidents of illegal dumping removed	685
Number of 311 requests made	210
Number of hours of pressure washing	1036
Number of stickers/posters removed	6800

Which usernames, emails do you make 311 requests from? (please specify as many as you can)

savlan@jacklondonoakland.org, josh@jacklondonoakland.org, josh@smsholdings.com

Number of days per week cleaning services are provided (1-7 days/wk)

7

Number of hours per week of cleaning services provided? (eg 40 hours, 120 hrs, etc)

360

Safety Services

Does your BID provide any supplemental safety services?(If you are unsure which services qualify as supplemental safety/hospitality, check "yes" to view the list.)

Yes

Is there a workforce development component to the hiring and/or training of your safety staff? (either in-house or with a partner organization)

Have worked with Downtown Streets Team and Swords to Ploughshares

What types of work is done by your safety staff?

Monitoring security cameras

Crime prevention workshops

Street patrol/ambassadors

Coordination with OPD

Hotline for visitors, merchants, residents to call to request immediate assistance

Walking safety escorts

Safety Outputs & Operations

Yearly Safety outputs for Calendar Year 2023 by your BID: (total per year, NOT per week or month)

	Number
Number of annual non-patrol hours dedicated by BID administrative staff and safety ambassadors/patrol to public safety program in 2023	2775
Number of annual patrol hours dedicated by public safety officers/ safety ambassadors hired by the BID to public safety program in 2023	4680
Number of merchant checks	2081
Number of 911 calls made by the BID	11
Number of non-emergency calls made by the BID	21
Number of security cameras installed by or in coordination with the BID as of Dec. 31, 2023	2
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies in 2023	17
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies prior to January 1, 2023 (if known)	50

Do you provide Safety patrol services throughout the year or just during the holidays/as needed?

Throughout the year

Regular schedule for Safety Patrol services

Day of the Week	Start Time	End Time
Monday	12:00 PM	04:00 PM
Tuesday	12:00 PM	09:00 PM
Wednesday	12:00 PM	09:00 PM
Thursday	12:00 PM	09:00 PM
Friday	12:00 PM	09:00 PM
Saturday	12:00 PM	09:00 PM
Sunday	08:00 AM	04:00 PM

Estimated number of security cameras to be installed by or in coordination with the BID in the District in 2024

70

Does your BID provide any supplemental streetscape/beautification services? (If you are unsure which services qualify as supplemental streetscape/beautification, check "yes" to view the list.)

Yes

What types of streetscape/beautification work is done by your BID? (including contracted and in house work)

Install/maintain planters and/or hanging baskets

Maintain tree wells

Install / maintain banners on street/light poles

Install pedestrian-oriented lighting (including stand-alone light poles and lights on private buildings that illuminate the public right of way)

Install/maintain public art pieces

install/maintain historic signage program litter receptacles

Streetscape/Beautification Outputs & Operations

Streetscape/Beautification outputs for Calendar Year 2023 by your BID:

	Number
Number of planters and/or hanging baskets installed and maintained	48
Number of tree wells maintained	580
Number of banners on street/light poles installed/maintained	98
Number of pedestrian-oriented lighting elements (including stand-alone light poles and lights on private buildings that illuminate the public right of way) installed	0
Number of Big Belly trashcans Installed and maintained	0
Number of public plazas installed/maintained	0
Number of public art pieces installed/maintained	21

Does your BID provide any supplemental Marketing, Events and Communications services?(If you are unsure which services qualify as supplemental marketing, events and communications services, check "yes" to view the list.)

Yes

What types of marketing and communications work is done by your BID? (including contracted and in house work)

Digital advertising (e.g. Oaklandside, Google, etc)

Social media advertising (eg. promoted posts and/or Facebook, Instagram ads campaigns, partnering with influencers)

Social media posts (non-promoted)

Direct mailings

Flyers & posters

Email newsletters

Nextdoor, partner organization newsletters (D2 & D3, Visit Oakland, etc)

What types of Events and District Promotions work is done by your BID? (including contracted and in house work)

Produce BID events

Sponsor/in-kind support to events produced by businesses and non-BID entities in the District

Maintain Event calendar on BID website

Input (non-BID) events in District onto BID/Visit Oakland event calendar

Produce District Guides/maps (including digital or printed)

What types of social media platforms does your BID actively use?

Facebook

Twitter

Instagram

Next Door

For each of the following platforms you actively use, how many subscribers/followers do you have?

	Number of subscribers/followers as of Dec 31, 2023	Number of posts/emails sent in 2023	Total Reach/opens in 2023	Total engagement/clicks in 2023
Email Distribution List	1712	26	52	23146
Facebook	801	70	32770	32770
Instagram	3554	36	32770	32770
Twitter	516	1	82	82
Tiktok	0	0	0	0

	Number of subscribers/followers as of Dec 31, 2023	Number of posts/emails sent in 2023	Total Reach/opens in 2023	Total engagement/clicks in 2023
WhatsApp	0	0	0	0
YouTube	0	0	0	0

Average open rate for Emails in 2023: 52

Events and District Promotions Outputs & Operations

Events and District Promotions outputs for Calendar Year 2023 by your BID:

	Number
Number of events produced by the BID	4
Number of non-BID events in the District sponsored by BID or in-kind support provided by BID	18
Amount (\$\$) of Event sponsorship provided in 2023	2800
Number of attendees to events produced by or sponsored/supported by the BID (best estimate):	20000

Business Support

Does your BID provide any supplemental Business Support services?(If you are unsure which services qualify as supplemental Business Support services, check "yes" to view the list.)

Yes

What kinds of initiatives did your BID implement to support existing businesses in your district

Information Sessions on federal/state/city regulations or programs (e.g.)

Social Events (e.g. networking events, meet & greets, sector meet-ups)

Educational Events (e.g. speaker series, panels, roundtables, best practice sharing)

Workshops & Trainings (e.g. financial management, marketing, accounting)

In-person Merchant outreach & contacts

Direct grants and permit assistance for safety and outdoor seating improvements

Business Support Outputs & Operations

Business Support outputs for Calendar Year 2023 by your BID:

	Number
Number of merchant contacts	196
Number of business support events coordinated by or supported by the BID for your businesses in 2023	6
Annual total number of your business attendees to business support events coordinated by or supported by the BID	240

BID 2023 Accomplishments & Plans for 2024

Please list out the BID's top accomplishments from 2023, as well as note-worthy new projects, services and plans for 2024. This is your chance to brag about your BID's impact! List at least three, and up to ten for each year.

Top Accomplishments or New programs/activities accomplished in 2023

Accomplishment/New activity description
<ul style="list-style-type: none"> • Issued \$16K of Merchant mini grants and staff assistance – to assist in updating and creating improved, compliant parklet and encroachment spaces and maintain vibrant outdoor dining and commerce areas
<ul style="list-style-type: none"> • Produced three original street festivals bringing thousands of new visitors to Jack London and showcasing local merchants: St.Patrick's Day, Brewing District Block Party, Chimaek Festival, and National Night Out
<ul style="list-style-type: none"> • Served as Fiscal Sponsor for deployment of innovative new Downtown Corridor Safety Grant in partnership with 5 other downtown community organizations: Chinatown Chamber of Commerce, Oakland Chinatown Improvement Council, Uptown/Lake Merritt CBD, Downtown CBD, KONO, Oakland Metropolitan Chamber of Commerce
<ul style="list-style-type: none"> • Achieved successful renewal of new ten year term with overwhelming stakeholder vote in support, with increased budget to address continued goals.

New programs/activities planned for 2024 calendar year (that the BID didn't do in 2023)

New program/activity description
New event series- 3 new street festivals
New merchant training series - social media, resident and community manager outreach, professional photo shoots to develop merchant collateral
New task force dedicated to enhancing and supporting entertainment and special events in the District-- the Downtown Specific Plan adopted designates Jack London as an Entertainment District

BID Financials

2023 Budget versus Actuals

Provide a line-item detailed budget versus actuals document of your BID expenses and revenues from the 2023 (already completed) calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan.

Upload your BID's 2023 line-item detailed budget versus actuals document here:



Please provide the Surplus or Deficit amount from the previous calendar year of 2023 that was carried over into 2024. If there is a surplus, please describe your plans for how it will be spent (eg. Operational reserves, etc)

\$16,980 is unspent, but will be spent in Q1 2024 on 2023 planned projects.

2024 Budget

Provide a line-item detailed budget of projected expenses and revenues for the current calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan. The budget you provide should be approved by your Board of Directors upon time of submission. If not, please note the budget as draft and alert City staff to determine next steps.

Upload your BID's 2024 line-item detailed budget document here, as approved by your BID's Board of Directors:



For the 2024 Calendar Year, please provide the estimated amounts and sources of any contributions to be made from sources other than BID assessments to be levied. Eg. donations, grant funding, etc.

Estimated Amount (\$)	Source of Contribution
500000	Grant- City of Oakland Downtown Corridor Safety

Will the BID be requesting an annual assessment rate increase for the upcoming fiscal year of 2024/2025?

Yes

What is the proposed assessment increase for Fiscal Year 2024/2025?

5

Please provide the date of the board meeting when this assessment was approved, and describe how this decision was communicated to the BID members:

Board held public meeting where it approved proposed assessment increase on 4/10/2024. Written assessment increase notification post cards were sent to each property owner's mailing address in the District.

What is the projected total assessment amount to be billed in this upcoming fiscal year of 2024/2025?

1698690

Board of Directors Roster 2023/2024
(list all directors that served anytime
during 2023 or 2024

Name	Affiliation Type	Name of Affiliated Business/Org	Title	Status
Jennifer Nettles		CIM/ Jack London Square	Secretary	Past
Ener Chiu	Property Owner/Rep	EBALDC	Director	Current
Kim Cole	Business Owner/Rep	KCRE	President	Current
Jonathan Fong	Community Member/Rep	(Former) Jack London Square Farmer's Market	Treasurer	Current
Peter Gertler	Property Owner/Rep	HNTB	Director	Current
Greg Pasquali	Property Owner/Rep	Carmel Partners		Current
Keith Stephenson	Business Owner/Rep	Purple Heart	Director	Current
Michael Carilli	Property Owner/Rep	101 Broadway	Director	Current
John Eric Henry	Business Owner/Rep	Pinnacle Drone Light Show	Director	Current
Lisa Villhauer	Property Owner/Rep	Arthaus Jack London / Riaz Capital	Director	Current
Greg Golinski	Property Owner/Rep	Heluna Health	Director	Current
Chris Pastena	Community Member/Rep	Chop Bar (Past)	Director	Past

**Jack London Improvement District
Operating Budget**

	2023	2024
Revenue		
Total 4000 Assessment Income	\$1,160,256	\$1,592,282
8700 Contingency allowance for uncollected assessments	-\$92,821	-\$159,228
Budgeted Revenue	\$1,067,436	\$1,433,054
Expenditures		
7000 MBSSI Maintenance, Beautification, Safety & Streetscape		
7100 Ambassador Services- Non-Port Assessment Funds	\$390,360	\$557,346
7150 & 7200 Subtotal- Port Share	\$195,143	\$204,900
7400 Maintenance Operations + Management	\$53,408	\$214,411
Total 7000 MBSSI Maintenance, Beautification, Safety & Streetscape	\$638,911	\$976,657
7700 MED Marketing & Economic Development		
7710 & 7800 Management & Operations	\$137,735	\$155,569
7800 Special Projects	\$55,400	\$86,693
Total 7700 MED Marketing & Economic Development	\$193,135	\$242,262
8000 AGCR Administration & Government/Community Relations		
8010-8450 District Management & Governance	\$149,485	\$117,229
8510-8580 Office Operations	\$56,530	\$61,958
Total 8000 AGCR Administration & Government/Community Relations	\$206,015	\$179,187
Total 8600 Collection Fees	\$29,375	\$66,793
Total Expenditures	\$1,067,436	\$1,464,899
Gross Difference	\$0	\$0

Percentage Allocation by area of Work	Management Plan	2023	2024
Maintenance & Beautification	55%	55%	61%
Marketing & Economic Development	18%	17%	15%
Administration & Government	19%	18%	11%
Contingency & Collection	8%	11%	14%
<i>Budget Management.</i> The management corporation may reallocate funding within the service categories, not to exceed 10 percent of the annual budgeted amount for each category consistent with the Management District Plan.			

2024 Operating Budget Notes: Three new staff positions including two new Ambassador positions and a Public Space Manager, supporting equipment including bikes and branded clean/safe program equipment. Staff positions are more accurately funded by time allocation within work categories.



BID Annual Reporting

The Business Development Division of the City of Oakland Economic and Workforce Development Department asks that you submit an Annual Report for the previous Calendar Year 2023 (CY23) - Jan 1, 2023 – Dec 31, 2023, and current Calendar Year (CY24). The information you submit via the following Annual Report will serve to summarize your BID’s programs and impacts for CY23, provide transparency regarding your organization’s sources and use of funds, and inform the City about updates to your Board and management team. The data you submit will also be used to generate aggregated information about the activities and impacts of our Business Improvement Districts in Oakland.

BID Name Koreatown Oakland

Contact Person and Information regarding Annual Reporting

This will not be shared publically, but rather needed for City of Oakland staff, in case of follow up questions or incomplete submissions

Name of person filling out the Annual Report Shari Godinez

Email Shari@koreatownnorthgate.org

Phone Number (510) 343-5439

General Information & District Composition

Number of Full Time Equivelant paid staff members employed by your BID? (Including in-house and contracted) Please do not double-count staff members in multiple of the following categories.

	Number of FTE
General/Admin Staff	5
Cleaning Ambassadors/workers	3
Public Safety Officers/Security Ambassadors	0
Hospitality/Business Outreach Ambassadors	1
Other Seasonal/Part-time staff	0
Volunteers (not counting your board members)	120

Notes about staffing numbers

Two staff are 80% KONO and 20% First Fridays. Two other staff are 100% First Fridays and one staff is

80% First Fridays and 20% KONO.
The ambassador team is sub contracted through Streetplus.

How many parcels in your BID? 464

Approximately how many residents in your BID? 672

Approximately how many occupied storefronts in your district? 161

Approximately how many vacant storefronts in your district? 10

Cleaning

Does your BID provide any supplemental cleaning services?(If you are unsure which services qualify as supplemental cleaning, check "yes" to view the list.)

Yes

Is there a workforce development component to the hiring and/or training of your cleaning staff? (either in-house or with a partner organization)

Streetplus trains ambassadors on CPR, Narcan, and de-escalation

What types of work is done by your cleaning staff?

Sidewalk sweeping and clearing gutters

Power Washing

Graffiti removal - public property

Graffiti removal - private property

Gum, sticker and Flyer Removal

Street furniture and trashcan maintenance and sanitization

Landscaping services and plant watering

Event-related Waste/recycling/compost sorting/collection

Illegal dumping removal

Responds to merchants request to help remove homeless people sleeping in their doorway.

Cleaning Outputs & Operations

Yearly Cleaning outputs for Calendar Year 2023 by your BID: (total per year, NOT per week or month)

	Number per year
Number of incidents of graffiti removed	3193
Number of bags of trash collected	8164
Pounds of trash collected (if you measure trash in pounds not bags)	204100
Number of Incidents of illegal dumping removed	932
Number of 311 requests made	583
Number of hours of pressure washing	705
Number of stickers/posters removed	10575

Which usernames, emails do you make 311 requests from? (please specify as many as you can)

Rhall@Streetplus.net, also anonymous before account profile was set up.

Number of days per week cleaning services are provided (1-7 days/wk)

7

Number of hours per week of cleaning services provided? (eg 40 hours, 120 hrs, etc)

168

Safety Services

Does your BID provide any supplemental safety services?(If you are unsure which services qualify as supplemental safety/hospitality, check "yes" to view the list.)

Yes

Is there a workforce development component to the hiring and/or training of your safety staff? (either in-house or with a partner organization)

Deescalation training

What types of work is done by your safety staff?

Coordination with OPD

Hotline for visitors, merchants, residents to call to request immediate assistance

Walking safety escorts

Respond to calls from merchants for assistance, usually with unhoused people

Safety Outputs & Operations

Yearly Safety outputs for Calendar Year 2023 by your BID: (total per year, NOT per week or month)

	Number
Number of annual non-patrol hours dedicated by BID administrative staff and safety ambassadors/patrol to public safety program in 2023	260
Number of annual patrol hours dedicated by public safety officers/ safety ambassadors hired by the BID to public safety program in 2023	0
Number of merchant checks	3932
Number of 911 calls made by the BID	17
Number of non-emergency calls made by the BID	0
Number of security cameras installed by or in coordination with the BID as of Dec. 31, 2023	78
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies in 2023	12
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies prior to January 1, 2023 (if known)	0

Do you provide Safety patrol services throughout the year or just during the holidays/as needed?

As grant funds become available

Estimated number of security cameras to be installed by or in coordination with the BID in the District in 2024

60

Does your BID provide any supplemental streetscape/beautification services? (If you are unsure which services qualify as supplemental streetscape/beautification, check "yes" to view the list.)

Yes

What types of streetscape/beautification work is done by your BID? (including contracted and in house work)

Install/maintain planters and/or hanging baskets

Maintain tree wells

Install/maintain public art pieces

Maintain city trash cans, sweep sidewalks and curbs, pick up bulky waste, weed and mulch tree wells, plant flowers

Streetscape/Beautification Outputs & Operations

Streetscape/Beautification outputs for Calendar Year 2023 by your BID:

	Number
Number of planters and/or hanging baskets installed and maintained	5
Number of tree wells maintained	100
Number of banners on street/light poles installed/maintained	100
Number of pedestrian-oriented lighting elements (including stand-alone light poles and lights on private buildings that illuminate the public right of way) installed	0
Number of Big Belly trashcans Installed and maintained	0
Number of public plazas installed/maintained	0
Number of public art pieces installed/maintained	2

Does your BID provide any supplemental Marketing, Events and Communications services?(If you are unsure which services qualify as supplemental marketing, events and communications services, check "yes" to view the list.)

Yes

What types of marketing and communications work is done by your BID? (including contracted and in house work)

Print news advertising (e.g. EBX, East Bay times,)

Digital advertising (e.g. Oaklandside, Google, etc)

Social media advertising (eg. promoted posts and/or Facebook, Instagram ads campaigns, partnering with influencers)

Social media posts (non-promoted)

Direct mailings

Flyers & posters

Email newsletters

Publish press releases

News live interviews, radio

What types of Events and District Promotions work is done by your BID? (including contracted and in house work)

Produce BID events

Sponsor/in-kind support to events produced by businesses and non-BID entities in the District

Input (non-BID) events in District onto BID/Visit Oakland event calendar

Produce District Guides/maps (including digital or printed)

Banners

What types of social media platforms does your BID actively use?

Facebook

Twitter

Instagram

YouTube

TikTok

For each of the following platforms you actively use, how many subscribers/followers do you have?

	Number of subscribers/followers as of Dec 31, 2023	Number of posts/emails sent in 2023	Total Reach/opens in 2023	Total engagement/clicks in 2023
Email Distribution List	7095	48	29	47711
Facebook	18389	334	162656	7300
Instagram	30152	431	178723	33437
Twitter	250	8	1836	43
Tiktok	258	37	0	1015
WhatsApp	0	0	0	0
YouTube	58	11	24600	3100

Average open rate for Emails in 2023: 35

Events and District Promotions Outputs & Operations

Events and District Promotions outputs for Calendar Year 2023 by your BID:

	Number
Number of events produced by the BID	11
Number of non-BID events in the District sponsored by BID or in-kind support provided by BID	35
Amount (\$\$) of Event sponsorship provided in 2023	58959
Number of attendees to events produced by or sponsored/supported by the BID (best estimate):	275000

Business Support

Does your BID provide any supplemental Business Support services?(If you are unsure which services qualify as supplemental Business Support services, check "yes" to view the list.)

Yes

What kinds of initiatives did your BID implement to support existing businesses in your district

Information Sessions on federal/state/city regulations or programs (e.g.)

Social Events (e.g. networking events, meet & greets, sector meet-ups)

Educational Events (e.g. speaker series, panels, roundtables, best practice sharing)

In-person Merchant outreach & contacts

Business Support Outputs & Operations

Business Support outputs for Calendar Year 2023 by your BID:

	Number
Number of merchant contacts	5000
Number of business support events coordinated by or supported by the BID for your businesses in 2023	15
Annual total number of your business attendees to business support events coordinated by or supported by the BID	500

BID 2023 Accomplishments & Plans for 2024

Please list out the BID's top accomplishments from 2023, as well as note-worthy new projects, services and plans for 2024. This is your chance to brag about your BID's impact! List at least three, and up to ten for each year.

Top Accomplishments or New programs/activities accomplished in 2023

Accomplishment/New activity description

KONO Completed a 50-question survey on the Impact of Crime on Oakland Businesses, garnering 139 responses from across Oakland. The results were shared with the D3 councilmember, the Mayor's office, and the California Governor. This survey proved instrumental in influencing the Governor's decision to deploy CHP officers to Oakland and assign additional prosecutors from the California National Guard and the state's Department of Justice to bolster prosecution efforts in Alameda County.

Accomplishment/New activity description
KONO Camera Project Phase 2 - a). Installed additional 20 cameras in 2023, bringing our total to 78 cameras. Received Donation for camera \$6,850.00 b). Shared video footage with OPD and businesses owners approximately 96 times in 2023. c).Solved four homicides with video footage provided to OPD investigators. (26th St., 25th St. (double homicide), 28th St.) d.)Received \$4,700.00 mini-grant for security cameras from Mayor’s office.
KONO Installed 13 new Oakland First Friday street pole banners on Telegraph Ave.
Walked door to door to alter KONO businesses about the Façade and Tenant Improvement grant and successful in getting 15 KONO businesses to apply.
KONO completed a successful tree pruning in February by all volunteers and compost bins donated by Councilmember Gallo.
KONO set up a shipping container to collect bulky waste pick up items and have Public Works collect all the items from one location weekly or as needed.
KONO was awarded \$20,000 Cultural Arts grant for Korean CultureFest 2023
KONO worked with Oakland BID Alliance to generated a list of OPD policy changes and shared with city.
The KONO gateway mural at 27th and Northgate was completed in 2022. In 2023 we installed a plaque and lights for mural.
KONO held Board training on the Brown Act & organizational operations.

New programs/activities planned for 2024 calendar year (that the BID didn't do in 2023)

New program/activity description
KONO plans to install 40 new cameras, covering five more intersections that have been identified as crime “hot spots”.
Completed KONO organizations Audit for 2022 on March 12, 2024 by Aprio.
KONO is working with four other BID/CBD’s to create a single hub for all the security video footage in an effort to make it easier and quicker for OPD to investigate crimes. This initiative aims to streamline the video retrieval process. We will be working with Safe City.
KONO was picked to do a pilot for reusable food ware, cups, in 2024 at the KONO Lounge First Fridays.
KONO is working with a film maker, funded by the city, to produce a KONO district promotional short film.

New program/activity description

KONO will produce our first Annual Golf Tournament Fundraiser for Oakland First Fridays on June 24, 2024 in Vallejo at Blue Ridge golf course with a goal to raise \$30,000.

BID Financials

2023 Budget versus Actuals

Provide a line-item detailed budget versus actuals document of your BID expenses and revenues from the 2023 (already completed) calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan.

Upload your BID's 2023 line-item detailed budget versus actuals document here:



KONO Budget vs. Actuals 2023.pdf

Please provide the Surplus or Deficit amount from the previous calendar year of 2023 that was carried over into 2024. If there is a surplus, please describe your plans for how it will be spent (eg. Operational reserves, etc)

\$89,535.71 is 1/3 of the carry forward that is being used in the 2024 budget. The total carry forward was divided into the next three years and will be exhausted by or before the renewal year. Our basic budget is inadequate to meet our basic needs therefore we plan to increase the assessment by 5% for the 2024/25 tax year. We plan to use \$11k for new cameras if we do not receive an adequate amount of grant funds from the safety grant.

2024 Budget

Provide a line-item detailed budget of projected expenses and revenues for the current calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan. The budget you provide should be approved by your Board of Directors upon time of submission. If not, please note the budget as draft and alert City staff to determine next steps.

Upload your BID's 2024 line-item detailed budget document here, as approved by your BID's Board of Directors:



2024 KONO Final Budget wit... .pdf

For the 2024 Calendar Year, please provide the estimated amounts and sources of any contributions to be made from sources other than BID assessments to be levied. Eg. donations, grant funding, etc.

Estimated Amount (\$)	Source of Contribution
24100	Donations
20000	grants
20000	Sales
59996	Sponsors
149988	Vendors
1200	Interest

Will the BID be requesting an annual assessment rate increase for the upcoming fiscal year of 2024/2025?

Yes

What is the proposed assessment increase for Fiscal Year 2024/2025? 5

Please provide the date of the board meeting when this assessment was approved, and describe how this decision was communicated to the BID members:

April 2, 2024 a Special Board meeting was held to approve the 2024 budget and to discuss the 2024/2025 assessment increase.

April 12, 2024 post cards mailed out to every parcel owner to inform them of the assessment increase vote happening on April 23, 2024. The card includes a QR code that goes to a letter on the KONO website with more details.

April 23, 2024 Special Board meeting to vote on assessment increase

What is the projected total assessment amount to be billed in this upcoming fiscal year of 2024/2025? 668764.02

Board of Directors Roster 2023/2024 (list all directors that served anytime during 2023 or 2024

Name	Affiliation Type	Name of Affiliated Business/Org	Title	Status
Joseph Jung	Property Owner/Rep		President	Current
Curt Haven	Property Owner/Rep	KP Market	VP	Current
Alan Wilk	Property Owner/Rep		Treasurer	Current
Nick Haven	Property Owner/Rep		Secretary	Current
Mike Thaler	Property Owner/Rep		Director	Current
Mindy Landmark	Property Owner/Rep	Sutter Health	Director	Current
Keun Bae Yoo	Property Owner/Rep		Director	Current
Shakira Scott	Community Member/Rep		Director	Current
Toni Blackstone	Community Member/Rep		Director	Current

Name	Affiliation Type	Name of Affiliated Business/Org	Title	Status
Gidget Pugh	Community Member/Rep		Director	Current
Alex Hahn	Property Owner/Rep		Director	Current
Hye Kyung Allen	Property Owner/Rep		Director	Current
Charles Long	Property Owner/Rep		Director	Current
Don Mayberry	Community Member/Rep		Director	Current
Nia Jones	Community Member/Rep		Director	Past

KOREATOWN OAKLAND 2023 BUDGET VS. ACTUALS				
BUDGET PERFORMANCE				Dec 31, 2023
			Budget	YTD Actuals
INCOME			2023	
CBD Assessments			\$644,865.46	\$660,823.13
Other (4.47% of assessments)			\$28,825.49	\$28,196.40
Total Income			\$673,690.95	\$689,019.53
Endowment for Renewal 1.0318%			\$6,951.14	\$7,109.30
Operating Reserves 5%		\$40,635.69	\$33,684.55	\$34,450.98
Carry fwd (1/3) of \$380,981.04		\$648,383.84	\$126,993.68	\$126,993.68
Total Operating Budget		\$775,377.52	\$760,048.94	\$774,452.93
EXPENSE DETAILS				
Security & Operations Security/Maintenance				
Streetplus			\$302,000.00	\$298,619.48
Administrative/Staff				
-Executive Assist: CR			\$14,502.31	\$17,751.98
-Executive Director:SG			\$91,109.14	\$80,649.04
Streetscape Improvements			\$5,800.00	\$0.00
Equipment			\$500.00	\$0.00
One Time Projects			\$0.00	\$3,800.00
Supplies			\$1,000.00	\$0.00
Water for power washing			\$3,750.00	\$3,949.89
Storage Rental			\$900.00	\$1,641.96
Landscaping/Tree trimming			\$3,500.00	\$1,527.10
Camera Project phase 2			\$45,000.00	\$9,980.00
Misc.			\$3,169.17	\$4,680.00
	Total		\$471,230.62	\$422,599.45
Administration				
Administraion Exec. Director			\$31,400.00	\$44,951.95
ED Medical Compensation			\$ 10,000.00	\$0.00
Bonus ED			\$ 10,000.00	\$0.00
Assistant			\$34,183.35	\$43,843.94
Rent			\$29,400.00	\$29,500.00
Supplies			\$2,000.00	\$5,805.30
Telephone/Internet			\$3,200.00	\$3,092.40
Online Services			\$2,500.00	\$4,212.55

Postage and Delivery			\$500.00	\$84.69
Office alarm			\$800.00	\$781.48
Office Equipment			\$500.00	\$2,687.99
Payroll Tax and Fees			\$17,000.00	\$28,384.02
Professional Fees				
-Accounting			\$7,500.00	\$8,110.00
-Consulting			\$7,000.00	\$5,357.96
Health Insurance			\$4,809.45	
AUDIT			\$0.00	\$7,500.00
Retirement:403b/Retirement Insurance			\$6,420.00	\$31,532.72
WFH			\$6,240.00	
Insurance				
-Liability Insurance			\$2,400.00	\$3,157.94
-D&O			\$1,400.00	\$1,623.00
-Worker's Compensation			\$1,900.00	\$1,106.56
- Property Insurance - garage			\$450.00	\$0.00
Licenses and Permits			\$100.00	\$299.75
Meals and Entertainment			\$3,500.00	\$6,145.88
Development & Training			\$2,000.00	\$2,741.00
Dues and Memberships			\$350.00	\$0.00
Repair & Maintenance			\$700.00	\$306.16
Travel			\$500.00	\$4,106.05
Taxes			\$40.00	\$0.00
Parking and Tolls			\$100.00	\$82.40
Bank Service Charges			\$75.00	\$56.00
Interest Expense			\$50.00	\$0.00
Utilities			\$2,700.00	\$4,077.50
Misc.			\$0.00	\$162.39
	Total		\$189,717.80	\$239,709.63
Marketing & Identity Enhancement Special Events				
Administration				
Executive Director			\$7,196.43	\$6,610.59
Marketing Director			\$10,400.00	\$3,803.20
Executive Assistant			\$3,107.48	\$3,804.01
Intern			\$10,500.00	\$0.00
Health Care			\$16,448.03	

Banners/Signage			\$2,000.00	\$9,589.78	
Holiday Celebrations			\$4,000.00	\$0.00	
Print Material, Brochures			\$3,300.00	\$1,933.96	
Special Events					
First Fridays			\$25,000.00	\$25,000.00	
WFH Compension			\$7,800.00	\$6,240.00	
Koreatown Culture			\$4,000.00	\$4,487.01	
Storage			\$3,800.00	\$3,939.00	
Misc.			\$1,548.58	\$0.00	
		\$99,100.52		\$65,407.55	
Total Expenses			\$760,048.94	\$727,716.63	\$32,332.31
			Budget	YTD Actuals	

KOREATOWN OAKLAND	2024	FINAL BUDGET APPROVED 4/2/2024	
	Budget		
INCOME		Notes	
CBD Assessments	\$668,764.02	2023/24 Assessment 644,865.46 (+ direct bills \$22,165.60 and utility rolls \$1,733.00) \$23,898.60 total	
Other (4.47% of assessments)	\$29,893.75	To be raised from grants, donations, foundations	
Total Income	\$698,657.77		
City Fees	\$6,687.64	City charges 1% fee to collect and distribute assessments	
Endowment for Renewal 1.0318%	\$6,900.31	2027 Renewal year	
Operating Reserves 5%	\$33,438.20		
Carry fwd current end of yr. \$343,607.14 includes \$75k CD	\$89,535.71	new carry fwd. (less 75k) Divided by 3 years = \$89,535.71 each year	
Total Operating Budget	\$741,167.33		
EXPENSE DETAILS:		Notes	
Security & Operations			
Security/Maintenance			
Streetplus	\$305,723.68	includes 2% increase	
Executive Director	\$77,766.67		
Executive Assistant	\$30,180.80		
Streetscape Improvements	\$0.00		
Equipment	\$0.00	\$0 last year	
One Time Projects	\$0.00	private security, new trash cans, etc.	
Supplies	\$0.00	\$0 last year	
Water for power washing	\$4,100.00		
Trash Services	\$1,500.00	Shipping Container; 121.28 month x 12 months = \$1,455.36	
Landscaping/Tree trimming	\$1,600.00	Tree well gorilla hair/mulch.	
Camera Project phase 3	\$23,829.25		
		\$444,700.40	60%
Administration			
Exec. Director	\$40,197.60	w/ 2% COL increase	
ED Medical Compensation	\$10,000.00		
Bonus ED	\$10,000.00		
Executive Assistant	\$0.00		
Staff Bonus	\$2,000.00		
Social Media Manager	\$10,000.00	8 hours week avg.	
WFH	\$14,040.00	5 Employees	
Health Benefits	\$21,000.00	For 2 employees (includes dental & vision for 4 employees)	
403b Retirement/Insurance	\$11,200.00	\$230 annual payment to be added for ERISA retirement Insurance	
Payroll Tax and Fees	\$30,000.00		
Total Salary/Benefits/fees		\$148,437.60	
Rent	\$31,200.00		

Supplies	\$4,000.00		
Telephone/Internet	\$3,200.00		
Online Services	\$4,000.00		
Postage and Delivery	\$100.00		
Office alarm	\$800.00		
Office Equipment	\$500.00		
Professional Fees			
-Accounting	\$8,200.00		
-Consulting	\$5,500.00	NBS	
Insurance			
-Liability Insurance	\$4,000.00		
-D&O	\$1,700.00		
-Worker's Compensation	\$1,300.00		
- Property Insurance - garage			
Licenses and Permits	\$300.00		
Meals and Entertainment	\$3,000.00	Includes Holiday dinner/board trainings/board meals	
Development & Training	\$500.00	CA Downtown Association and IDA conferences	
Dues and Memberships	\$0.00	\$0 last year	
Repair & Maintenance	\$300.00		
Travel	\$0.00	For conferences	
Taxes	\$0.00	\$0 last year	
Parking and Tolls	\$100.00		
Bank Service Charges	\$70.00	Domestic wire fees for receiving funds @\$14 each	
Interest Expense	\$0.00	\$0 last year	
Utilities	\$4,200.00	PG&E	
Misc.	\$942.60		
TOTAL ADMIN		\$222,350.20	30%
MARKETING			
Executive Director	\$4,435.93		
Executive Assistant	\$30,180.80		
Banners/Signage	\$0.00		
Holiday Celebrations	\$0.00		
Print Material, Brochures	\$2,000.00	Annual mail out and a resource guide	
Special Events			
First Fridays	\$25,000.00		
Koreatown Culture	\$8,500.00	grant funds coming in March	
Storage	\$4,000.00	basement storage	
Total Marketing Expenses		\$74,116.73	10%
Grand Total	\$741,167.33		
Net	\$0.00		100%

EXPENSE CATEGORIES 2024			
Marketing and Identity Enhancement	\$74,116.73	10%	
Safety, Maintenance, and Sidewalk Operations	\$444,700.40	60%	
Administrative Costs	\$222,350.20	30%	
Total Expenses	\$741,167.33	100%	



BID Annual Reporting

The Business Development Division of the City of Oakland Economic and Workforce Development Department asks that you submit an Annual Report for the previous Calendar Year 2023 (CY23) - Jan 1, 2023 – Dec 31, 2023, and current Calendar Year (CY24). The information you submit via the following Annual Report will serve to summarize your BID’s programs and impacts for CY23, provide transparency regarding your organization’s sources and use of funds, and inform the City about updates to your Board and management team. The data you submit will also be used to generate aggregated information about the activities and impacts of our Business Improvement Districts in Oakland.

BID Name The Lake Merritt Uptown District Association

Contact Person and Information regarding Annual Reporting

This will not be shared publically, but rather needed for City of Oakland staff, in case of follow up questions or incomplete submissions

Name of person filling out the Annual Report Tori Decker

Email tori@downtownoakland.org

Phone Number (510) 213-1530

General Information & District Composition

Number of Full Time Equivelant paid staff members employed by your BID? (Including in-house and contracted) Please do not double-count staff members in multiple of the following categories.

	Number of FTE
General/Admin Staff	3
Cleaning Ambassadors/workers	5.4
Public Safety Officers/Security Ambassadors	0
Hospitality/Business Outreach Ambassadors	5.4
Other Seasonal/Part-time staff	0
Volunteers (not counting your board members)	0

Notes about staffing numbers

Our ambassador program is cleaning and hospitality-focused; all staff members serve in both capacities.

They clean during the first half of each shift and then return their mega-brutes to base and head back out to work to make business contacts and engage more with the public. I have divided the hours between cleaning and hospitality accordingly.

How many parcels in your BID? 459

Approximately how many residents in your BID? 1533

Approximately how many occupied storefronts in your district? 420

Approximately how many vacant storefronts in your district? 62

Cleaning

Does your BID provide any supplemental cleaning services?(If you are unsure which services qualify as supplemental cleaning, check "yes" to view the list.)

Yes

Is there a workforce development component to the hiring and/or training of your cleaning staff? (either in-house or with a partner organization)

CROP, CEO

What types of work is done by your cleaning staff?

Sidewalk sweeping and clearing gutters

Power Washing

Graffiti removal - public property

Graffiti removal - private property

Gum, sticker and Flyer Removal

Street furniture and trashcan maintenance and sanitization

Landscaping services and plant watering

Event-related Waste/recycling/compost sorting/collection

Illegal dumping removal

Cleaning Outputs & Operations

Yearly Cleaning outputs for Calendar Year 2023 by your BID: (total per year, NOT per week or month)

	Number per year
Number of incidents of graffiti removed	37460
Number of bags of trash collected	0
Pounds of trash collected (if you measure trash in pounds not bags)	177026
Number of Incidents of illegal dumping removed	3302
Number of 311 requests made	380
Number of hours of pressure washing	163
Number of stickers/posters removed	6616

Which usernames, emails do you make 311 requests from? (please specify as many as you can)

charles@downtownoakland.org

Number of days per week cleaning services are provided (1-7 days/wk)

7

Number of hours per week of cleaning services provided? (eg 40 hours, 120 hrs, etc)

220

Safety Services

Does your BID provide any supplemental safety services?(If you are unsure which services qualify as supplemental safety/hospitality, check "yes" to view the list.)

Yes

Is there a workforce development component to the hiring and/or training of your safety staff? (either in-house or with a partner organization)

No

What types of work is done by your safety staff?

Monitoring security cameras

Street patrol/ambassadors

Coordination with OPD

Hotline for visitors, merchants, residents to call to request immediate assistance

Walking safety escorts

Safety Outputs & Operations

Yearly Safety outputs for Calendar Year 2023 by your BID: (total per year, NOT per week or month)

	Number
Number of annual non-patrol hours dedicated by BID administrative staff and safety ambassadors/patrol to public safety program in 2023	1000
Number of annual patrol hours dedicated by public safety officers/ safety ambassadors hired by the BID to public safety program in 2023	11284
Number of merchant checks	29806
Number of 911 calls made by the BID	0
Number of non-emergency calls made by the BID	0
Number of security cameras installed by or in coordination with the BID as of Dec. 31, 2023	86
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies in 2023	47
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies prior to January 1, 2023 (if known)	0

Do you provide Safety patrol services throughout the year or just during the holidays/as needed?

Throughout the year

Regular schedule for Safety Patrol services

Day of the Week	Start Time	End Time
Monday	07:00 AM	11:00 PM
Tuesday	07:00 AM	11:00 PM
Wednesday	07:00 AM	11:00 PM
Thursday	07:00 AM	11:00 PM
Friday	07:00 AM	11:00 PM
Saturday	07:00 AM	11:00 PM
Sunday	07:00 AM	11:00 PM

Estimated number of security cameras to be installed by or in coordination with the BID in the District in 2024

136

Does your BID provide any supplemental streetscape/beautification services? (If you are unsure which services qualify as supplemental streetscape/beautification, check "yes" to view the list.)

Yes

What types of streetscape/beautification work is done by your BID? (including contracted and in house work)

Install/maintain planters and/or hanging baskets

Streetscape/Beautification Outputs & Operations

Streetscape/Beautification outputs for Calendar Year 2023 by your BID:

	Number
Number of planters and/or hanging baskets installed and maintained	70
Number of tree wells maintained	0
Number of banners on street/light poles installed/maintained	60
Number of pedestrian-oriented lighting elements (including stand-alone light poles and lights on private buildings that illuminate the public right of way) installed	0
Number of Big Belly trashcans Installed and maintained	5
Number of public plazas installed/maintained	2
Number of public art pieces installed/maintained	15

Does your BID provide any supplemental Marketing, Events and Communications services?(If you are unsure which services qualify as supplemental marketing, events and communications services, check "yes" to view the list.)

Yes

What types of marketing and communications work is done by your BID? (including contracted and in house work)

Print news advertising (e.g. EBX, East Bay times,)

Digital advertising (e.g. Oaklandside, Google, etc)

Social media advertising (eg. promoted posts and/or Facebook, Instagram ads campaigns, partnering with influencers)

Social media posts (non-promoted)

Direct mailings

Flyers & posters

Email newsletters

What types of Events and District Promotions work is done by your BID? (including contracted and in house work)

Produce BID events

Sponsor/in-kind support to events produced by businesses and non-BID entities in the District

Maintain Event calendar on BID website

Input (non-BID) events in District onto BID/Visit Oakland event calendar

Produce District Guides/maps (including digital or printed)

What types of social media platforms does your BID actively use?

Facebook

Instagram

YouTube

TikTok

For each of the following platforms you actively use, how many subscribers/followers do you have?

	Number of subscribers/followers as of Dec 31, 2023	Number of posts/emails sent in 2023	Total Reach/opens in 2023	Total engagement/clicks in 2023
Email Distribution List	2760	70	26668	1310
Facebook	11805	205	151700	1210
Instagram	3383	548	103200	2500
Twitter	0	0	0	0
Tiktok	94	0	0	893
WhatsApp	0	0	0	0
YouTube	99	94	0	0

Average open rate for Emails in 2023: 41

Events and District Promotions Outputs & Operations

Events and District Promotions outputs for Calendar Year 2023 by your BID:

	Number
Number of events produced by the BID	46

	Number
Number of non-BID events in the District sponsored by BID or in-kind support provided by BID	4
Amount (\$\$) of Event sponsorship provided in 2023	23750
Number of attendees to events produced by or sponsored/supported by the BID (best estimate):	400

Business Support

Does your BID provide any supplemental Business Support services?(If you are unsure which services qualify as supplemental Business Support services, check "yes" to view the list.)

Yes

What kinds of initiatives did your BID implement to support existing businesses in your district

In-person Merchant outreach & contacts

Business Support Outputs & Operations

Business Support outputs for Calendar Year 2023 by your BID:

	Number
Number of merchant contacts	29806
Number of business support events coordinated by or supported by the BID for your businesses in 2023	0
Annual total number of your business attendees to business support events coordinated by or supported by the BID	0

BID 2023 Accomplishments & Plans for 2024

Please list out the BID's top accomplishments from 2023, as well as note-worthy new projects, services and plans for 2024. This is your chance to brag about your BID's impact! List at least three, and up to ten for each year.

Top Accomplishments or New programs/activities accomplished in 2023

Accomplishment/New activity description

Oakland Works Wednesdays - 2023 Summary The story of OWW is one of direct engagement and connections. This new initiative has opened doors into our community in a fresh and dynamic way. We are connecting and showcasing our small storefront businesses with the office employee communities and the residential communities; developing and curating an ecosystem of mutually beneficial relationships. In addition to cultivating connections and highlighting our robust community of entrepreneurs and innovators, we are integrating the activation of public spaces to add to the vibrancy of our neighborhood. Our AMP partnership with the Oakland School for the Arts, showcasing the amazing talent of our youth to our downtown employees, residents, and visitors, is a prime example of the abundance and deep roots our organization has developed over the years. Wednesday is the tip of the iceberg. By focusing on Wednesdays, a day we found in preliminary surveys as the most busy day at corporate offices, we believe to show proof of concept that the energy and desire is here to bring back the vibrancy downtown had prior to the pandemic. The culmination of this effort is to uplift all enterprises, to highlight what is here, and help imagine what could be. Together we will activate, elevate, and celebrate our vibrant community. In mid-July of 2023 the Uptown Downtown Oakland Community Benefit Districts partnered with Aitan Mizrahi to move forward with the Oakland Works Wednesdays initiative. The initiative, originally conceived of by Cortt Dunlap of Awaken Cafe & Roasting in the Spring of 2023, had slowed down from the initial push due to lack of capacity by the stakeholders. The hiring of Aitan as coordinator reinvigorated this project, providing a dedicated individual to hit the streets and meet face-to-face with local businesses. This strategy has proven effective based on the number of ground-floor businesses, corporate offices, and residential complexes participating. In addition to connecting these key stakeholders, The Oakland School for the Arts students have put on five performances so far and are scheduled to perform twice a month, through May 2024, activating public space and enhancing the overall experience for our downtown community. Notable Successes Storefront Retail We are asking our ground floor businesses to join us in this initiative by: Registering on the website and adding their information to our directory Offering a special to their customers on Wednesdays Post the window cling on their storefront In exchange for participating we offer: Placement on the website and map Direct engagement Regular digital emails with highlights and strategies to maximize the impact Publicity on our social media platforms Of the 140 businesses approached to participate in the initiative, 79 have signed up to be featured on the website. Of those, 56 are offering discounts (70%), and 49 have window clings. Residential 9 residential buildings are spreading the word to their tenants by posting physical flyers in the common spaces and sharing our message via internal communications and their social media platforms. Corporate Offices Our corporate partners are also sharing the message with their teams and are looking forward to more opportunities to share with their employees. Public Space Activation We are proud of our partnership with OSA in activating the downtown public

space. When the weather permits they set up at Latham Square and if it rains they end up at Awaken Cafe. So far, we've had six performances ranging from big bands to duets to poetry readings. Local Economy The OakCentric eGift Card is a strategy to connect the consumer with our retail. Keeping the dollars local maximizes the impact. The card is purchased online and can be used at participating businesses. Summary The story of OWW is one of direct engagement and connections. This new initiative has opened doors into our community in a fresh and dynamic way. We are connecting and showcasing our small storefront businesses with the office employee communities and the residential communities; developing and curating an ecosystem of mutually beneficial relationships. In addition to cultivating connections and highlighting our robust community of entrepreneurs and innovators, we are integrating the activation of public spaces to add to the vibrancy of our neighborhood. Our AMP partnership with the Oakland School for the Arts, showcasing the amazing talent of our youth to our downtown employees, residents, and visitors, is a prime example of the abundance and deep roots our organization has developed over the years. Wednesday is the tip of the iceberg. By focusing on Wednesdays, a day we found in preliminary surveys as the most busy day at corporate offices, we believe to show proof of concept that the energy and desire is here to bring back the vibrancy downtown had prior to the pandemic. The culmination of this effort is to uplift all enterprises, to highlight what is here, and help imagine what could be. Together we will activate, elevate, and celebrate our vibrant community.

Vendor Transition from National clean and safe services provider, Block by Block, to Oakland-based, District Works. Their values align with those of the district with a focus on placemaking and community building and they embody an employee-first model.

n/a

New programs/activities planned for 2024 calendar year (that the BID didn't do in 2023)

New program/activity description
Muralists of Oakland Film Screening - featuring the works of 6 talented muralists and their impact on our downtown.
Locals' Night Out Bar Crawl(s) - small business support initiative.
n/a

BID Financials

2023 Budget versus Actuals

Provide a line-item detailed budget versus actuals document of your BID expenses and revenues from the 2023 (already completed) calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan.

Upload your BID's 2023 line-item detailed budget versus actuals document here:


December_2023_LMU_Budge....pdf

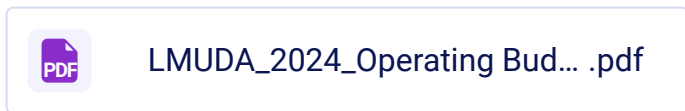
Please provide the Surplus or Deficit amount from the previous calendar year of 2023 that was carried over into 2024. If there is a surplus, please describe your plans for how it will be spent (eg. Operational reserves, etc)

We carried forward \$48,761.60 from 2023 into 2024 - a combination of expense category underspend and reserve funds. Those carry-forward dollars were plugged into the 2024 operating budget as a reserve and distributed according to our prescribed percentage allocations into Clean and Safe Enhancements and Marketing and Administrative Enhancement budget line items.

2024 Budget

Provide a line-item detailed budget of projected expenses and revenues for the current calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan. The budget you provide should be approved by your Board of Directors upon time of submission. If not, please note the budget as draft and alert City staff to determine next steps.

Upload your BID's 2024 line-item detailed budget document here, as approved by your BID's Board of Directors:



For the 2024 Calendar Year, please provide the estimated amounts and sources of any contributions to be made from sources other than BID assessments to be levied. Eg. donations, grant funding, etc.

Estimated Amount (\$)	Source of Contribution
800000	Additional Services Contracts - PG&E, Kaiser

Will the BID be requesting an annual assessment rate increase for the upcoming fiscal year of 2024/2025?

Yes

What is the proposed assessment increase for Fiscal Year 2024/2025?

5

Please provide the date of the board meeting when this assessment was approved, and describe how this decision was communicated to the BID members:

The 5% annual assessment increase was discussed and approved at the March 13, 2024 LMUDA board meeting. Prior to that meeting, a postcard was mailed to all affected stakeholders alerting them to the discussion of said increase on March 13 and directing them to a letter on our website detailing the justification. The postcard was mailed out on February 23, 2024.

What is the projected total assessment amount to be billed in this upcoming fiscal year of 2024/2025?

2109926.76

Board of Directors Roster 2023/2024 (list all directors that served anytime during 2023 or 2024)

Name	Affiliation Type	Name of Affiliated Business/Org	Title	Status
Sara de la Riva	Property Owner/Rep	Rubicon Point Partners	President	Current

Name	Affiliation Type	Name of Affiliated Business/Org	Title	Status
Kim Bardakian	Business Owner/Rep	Kapor Center for Social Impact	VP	Current
Ruth Simon	Condo Owner/Rep	Broadway Grand Resident	Treasurer	Current
Nicole Price	Property Owner/Rep	Starwood Capital Group	Secretary	Current
Terry Wood	Business Owner/Rep	Kaiser Permanente	Director	Past
Don Rogers	Property Owner/Rep	CIM Group	Director	Current
Yvette McCoy	Business Owner/Rep	BART	Director	Past
Ke Norman	Business Owner/Rep	Nailphoria Day Spa	Director	Past
Ramsey Wright	Community Member/Rep	Kidder Mathews	Director	Current
Tederal Glover	Property Owner/Rep	Kaiser Permanente	Director	Current
Deborah Boyer	Community Member/Rep	n/a	Director	Current

Lake Merritt-Uptown District Association
Budget vs. Actuals: LMUDA 2023 OPerating Budget - FY23 P&L
January - December 2023

	Actual	Budget
Income		
Assessment Revenue	1,835,616.22	1,859,856.02
(Reserve)	0.00	-55,000.00
Prior Year Bal - Carry Forward	0.00	126,330.37
Total Assessment Revenue	\$ 1,835,616.22	\$ 1,931,186.39
Total Income	\$ 1,835,616.22	\$ 1,931,186.39
Gross Profit	\$ 1,835,616.22	\$ 1,931,186.39
Expenses		
Clean and Safe Enhancements	0.00	0.00
Clean and Safe	1,105,173.38	1,113,237.00
Misc.	1,093.09	3,000.00
Outreach Coordinator	12,282.42	15,000.00
Program Coordinator	53,574.00	53,574.00
Program Director	65,862.00	65,862.00
PROW Maintenance	147,178.62	133,202.59
Total Clean and Safe Enhancements	\$ 1,385,163.51	\$ 1,383,875.59
Marketing and Economic Enhance.	0.00	0.00
Accounting Expenses	16,591.04	15,100.00
Annual Stakeholder Event	0.00	3,500.00
Computer Service & Support	292.51	1,500.00
Consulting & Legal Expenses	0.00	500.00
Digital Media Coordinator	49,293.98	53,344.00
Fees & Permits	654.37	5,685.80
Insurance	0.00	0.00
Directors & Officers	600.00	600.00
General Liability	5,242.00	5,242.00
Total Insurance	\$ 5,842.00	\$ 5,842.00
Marketing and Communications	36,533.60	35,000.00
Misc	4,314.15	4,000.00
Office furniture & equipment	4,518.68	7,500.00
Postage, shipping, delivery	423.96	260.00
Printing & copying	2,620.11	2,500.00
Public Space Programming	51,774.79	60,000.00
Rent	71,611.72	73,500.00
Staff and Board Development	14,652.62	10,000.00
Staff Personnel	262,979.00	262,979.00
Supplies	2,475.85	3,000.00
Telephone & telecommunications	3,443.10	3,100.00
Total Marketing and Economic Enhance.	\$ 528,021.48	\$ 547,310.80
Total Expenses	\$ 1,913,184.99	\$ 1,931,186.39

2024 LMUDA Operating Budget

	2024		
	Budget	Notes	% by Category
Income			
Assessment Revenue (97% collection)	1,944,146.37		
(Reserve)	-51,878.97	2% of anticipated collection.	2%
Prior Year Carry Forward	48,761.60	Includes remaining Reserve and and projected expense category underspend.	
Total Assessment Revenue	\$ 1,941,029.00		
Total Income	\$ 1,941,029.00		
Expenses			
Clean and Safe Enhancements			
Clean and Safe	1,145,285.00	Incorporates a 3% increase to maintain current service levels.	
Misc.	2,000.00		
Outreach Coordinator	15,000.00		
Program Coordinator	55,181.00	Incorporates a 3% increase and COE increase inclusive of additional employee benefits.	
Program Director	67,838.00	Incorporates a 3% increase and COE increase inclusive of additional employee benefits.	
PROW Maintenance	135,000.00	Allocation based on anticipated need. Includes monthly cost for Advanced Reporting Platform.	
Total Clean and Safe Enhancements	\$ 1,420,304.00		71%
Marketing and Economic Enhance.			
Accounting Expenses	4,600.00	Includes tax preparation and Bill.com processing fees.	
Annual Stakeholder Event	3,500.00	We are going to make this happen in 2024!!	
Computer Service & Support	500.00		
Consulting & Legal Expenses	500.00		
Digital Media Coordinator and Support	52,999.00	Incorporates a 3% increase and COE increase inclusive of additional employee benefits.	
Memberships, Fees & Permits			
Insurance	2,000.00		
Directors & Officers	600.00		
General Liability	5,408.00		
Marketing and Communications	30,000.00		
Misc	5,000.00		
Office furniture & equipment	5,000.00		
Postage, shipping, delivery	500.00		
Printing & copying	2,750.00		
Public Space Programming	50,000.00		
Rent	72,500.00	Best guess with information at hand - will keep everyone apprised as things develop.	
Staff and Board Development	7,500.00	Allocation based on anticipated needs.	
Staff Personnel	270,868.00	Incorporates 3% increase and COE increase inclusive of additional employee benefits.	
Supplies	3,000.00		
Telephone & Telecommunications	3,500.00	Increase due to wifi upgrade in ambassador suite.	
Total Marketing and Economic Enhancements	\$ 520,725.00		27%
Total Expenses	\$ 1,941,029.00		
	\$ 0.00		



BID Annual Reporting

The Business Development Division of the City of Oakland Economic and Workforce Development Department asks that you submit an Annual Report for the previous Calendar Year 2023 (CY23) - Jan 1, 2023 – Dec 31, 2023, and current Calendar Year (CY24). The information you submit via the following Annual Report will serve to summarize your BID’s programs and impacts for CY23, provide transparency regarding your organization’s sources and use of funds, and inform the City about updates to your Board and management team. The data you submit will also be used to generate aggregated information about the activities and impacts of our Business Improvement Districts in Oakland.

BID Name Lakeshore Avenue BID

Contact Person and Information regarding Annual Reporting

This will not be shared publically, but rather needed for City of Oakland staff, in case of follow up questions or incomplete submissions

Name of person filling out the Annual Report Carol Knight

Email Carol@lakeshoreavenue.com

Phone Number 5105080253

General Information & District Composition

Number of Full Time Equivelant paid staff members employed by your BID? (Including in-house and contracted) Please do not double-count staff members in multiple of the following categories.

	Number of FTE
General/Admin Staff	0
Cleaning Ambassadors/workers	1
Public Safety Officers/Security Ambassadors	1
Hospitality/Business Outreach Ambassadors	1
Other Seasonal/Part-time staff	3
Volunteers (not counting your board members)	3

How many parcels in your BID? 45

Approximately how many residents in your BID? 0

Approximately how many occupied storefronts in your district? 70

Approximately how many vacant storefronts in your district? 13

Cleaning

Does your BID provide any supplemental cleaning services?(If you are unsure which services qualify as supplemental cleaning, check "yes" to view the list.)

Yes

Is there a workforce development component to the hiring and/or training of your cleaning staff? (either in-house or with a partner organization)

Unity Council

What types of work is done by your cleaning staff?

Sidewalk sweeping and clearing gutters

Power Washing

Graffiti removal - public property

Graffiti removal - private property

Gum, sticker and Flyer Removal

Cleaning Outputs & Operations

Yearly Cleaning outputs for Calendar Year 2023 by your BID: (total per year, NOT per week or month)

	Number per year
Number of incidents of graffiti removed	104
Number of bags of trash collected	480
Pounds of trash collected (if you measure trash in pounds not bags)	
Number of Incidents of illegal dumping removed	3
Number of 311 requests made	52
Number of hours of pressure washing	48
Number of stickers/posters removed	20

Which usernames, emails do you make 311 requests from? (please

Carol Knight,
Carol@lakeshore.com,
510.500.0050

Number of days per week cleaning services are provided (1-7 days/wk) 5

Number of hours per week of cleaning services provided? (eg 40 hours, 120 hrs, etc) 20

Safety Services

Does your BID provide any supplemental safety services?(If you are unsure which services qualify as supplemental safety/hospitality, check "yes" to view the list.)

Yes

Is there a workforce development component to the hiring and/or training of your safety staff? (either in-house or with a partner organization)

No

What types of work is done by your safety staff?

Crime prevention workshops

Street patrol/ambassadors

Coordination with OPD

Hotline for visitors, merchants, residents to call to request immediate assistance

Walking safety escorts

Safety Outputs & Operations

Yearly Safety outputs for Calendar Year 2023 by your BID: (total per year, NOT per week or month)

	Number
Number of annual non-patrol hours dedicated by BID administrative staff and safety ambassadors/patrol to public safety program in 2023	200
Number of annual patrol hours dedicated by public safety officers/ safety ambassadors hired by the BID to public safety program in 2023	2912
Number of merchant checks	8000
Number of 911 calls made by the BID	100
Number of non-emergency calls made by the BID	200

	Number
Number of security cameras installed by or in coordination with the BID as of Dec. 31, 2023	0
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies in 2023	40
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies prior to January 1, 2023 (if known)	25

Do you provide Safety patrol services throughout the year or just during the holidays/as needed?

Throughout the year

Does your BID provide any supplemental streetscape/beautification services? (If you are unsure which services qualify as supplemental streetscape/beautification, check "yes" to view the list.)

Yes

What types of streetscape/beautification work is done by your BID? (including contracted and in house work)

Install/maintain planters and/or hanging baskets

Maintain tree wells

Install / maintain banners on street/light poles

Install pedestrian-oriented lighting (including stand-alone light poles and lights on private buildings that illuminate the public right of way)

Install/maintain Big Belly trashcans

Install/maintain public plazas

Install/maintain public art pieces

Streetscape/Beautification Outputs & Operations

Streetscape/Beautification outputs for Calendar Year 2023 by your BID:

	Number
Number of planters and/or hanging baskets installed and maintained	15
Number of tree wells maintained	20

	Number
Number of banners on street/light poles installed/maintained	0
Number of pedestrian-oriented lighting elements (including stand-alone light poles and lights on private buildings that illuminate the public right of way) installed	20
Number of Big Belly trashcans Installed and maintained	3
Number of public plazas installed/maintained	4
Number of public art pieces installed/maintained	2

Does your BID provide any supplemental Marketing, Events and Communications services?(If you are unsure which services qualify as supplemental marketing, events and communications services, check "yes" to view the list.)

Yes

What types of marketing and communications work is done by your BID? (including contracted and in house work)

Social media advertising (eg. promoted posts and/or Facebook, Instagram ads campaigns, partnering with influencers)

Social media posts (non-promoted)

Flyers & posters

Email newsletters

monthly newsletter posted to website

What types of Events and District Promotions work is done by your BID? (including contracted and in house work)

Produce BID events

Sponsor/in-kind support to events produced by businesses and non-BID entities in the District

Parades at Easter and Halloween for families

What types of social media platforms does your BID actively use?

Facebook

Instagram

NEws letters of Homeowners and Splash Pad News

For each of the following platforms you actively use, how many subscribers/followers do you have?

	Number of subscribers/followers as of Dec 31, 2023	Number of posts/emails sent in 2023	Total Reach/opens in 2023	Total engagement/clicks in 2023
Email Distribution List	125	1500		
Facebook	897	556		809
Instagram	877	562		
Twitter				
Tiktok				
WhatsApp				
YouTube				

Average open rate for Emails in 2023: 0

Events and District Promotions Outputs & Operations

Events and District Promotions outputs for Calendar Year 2023 by your BID:

	Number
Number of events produced by the BID	4
Number of non-BID events in the District sponsored by BID or in-kind support provided by BID	6
Amount (\$\$) of Event sponsorship provided in 2023	4000
Number of attendees to events produced by or sponsored/supported by the BID (best estimate):	75

Business Support

Does your BID provide any supplemental Business Support services?(If you are unsure which services qualify as supplemental Business Support services, check "yes" to view the list.)

Yes

What kinds of initiatives did your BID implement to support existing businesses in your district

Social Events (e.g. networking events, meet & greets, sector meet-ups)

Educational Events (e.g. speaker series, panels, roundtables, best practice sharing)

In-person Merchant outreach & contacts

Business Support Outputs & Operations

Business Support outputs for Calendar Year 2023 by your BID:

	Number
Number of merchant contacts	70
Number of business support events coordinated by or supported by the BID for your businesses in 2023	35
Annual total number of your business attendees to business support events coordinated by or supported by the BID	

BID 2023 Accomplishments & Plans for 2024

Please list out the BID's top accomplishments from 2023, as well as note-worthy new projects, services and plans for 2024. This is your chance to brag about your BID's impact! List at least three, and up to ten for each year.

Top Accomplishments or New programs/activities accomplished in 2023

Accomplishment/New activity description
This years focus was to bring Merchants from Grand and Lakeshore together to create a strong retail presence. With this idea in mind we have brought together OPD, Homeowners, community leaders and merchants to meet every quarter and create a list of items that will benefit our retailers with sales and safety. This project has been very successful and is growing in participation with more and more merchants coming each time.
We have worked with the LGBTQ center to make our BID part of the Cultural Community, and we accomplished this.
We have made sure Lakeshore Avenue stays clean, by hiring PCS of the Unity Council here in Oakland, to do steam cleaning every four months with the increase of homelessness in Oakland and the lack of places for the unhoused to go to the restroom. We feel this is a very important move to keep our Avenue safe and clean.
Every year for the past 28 years Our BID has provided a Easter parade, a Halloween parade and a Christmas stroll. These are very important events to our community and to our merchants.

Accomplishment/New activity description

We also put out a monthly blog along with Splashpad news, gathering information from each merchant of what is happening in their shop example :special sales, special promotion and new arrivals. Share new store openings, this letter goes out to entire community.

New programs/activities planned for 2024 calendar year (that the BID didn't do in 2023)

New program/activity description

Our main goal, is to find and create an office space for the OPD walking officers, And CRO officers in our area, we feel that with crime been up a larger police presence will help. we also feel that we need to give them a place to go to the restroom a place to sit down and do reports will be a win-win for all.

We are also working with the LGBTQ to try and raise money to have some community ambassadors in our area

We also have a triangle at Lakeshore and Lakepark, this is an open dirt hole right now that's supposed to be managed by the city. We cannot seem to get them to do it as they keep saying they have no funds and no one to do it so we are going to beautify this triangle so when you first come onto Lakeshore, you could see something pretty. The bid will be providing plants dirt and labor the LGBTQ is going to get volunteers.

We are also trying to get the city to help us with the landlords that have not rented they're building in many many years. We have three properties that people would like to rent and the landlord continually turned down offers. One of these properties has been vacant for over 10 years.

BID Financials

2023 Budget versus Actuals

Provide a line-item detailed budget versus actuals document of your BID expenses and revenues from the 2023 (already completed) calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan.

Please provide the Surplus or Deficit amount from the previous calendar year of 2023 that was carried over into 2024. If there is a surplus, please describe your plans for how it will be spent (eg. Operational reserves, etc)

1. Public and Merchant Safety more communication with OPD and our community Resource Officer. Our Security works 7 days a week 9 hours each day.
2. Collaboration with LGBTQ Center and GABA to Make Lakeshore a Cultural District
3. Collaboration with GABA, Nikki Bas and OPD to sponsor Safety meetings with all Merchants in our area.
4. Our Christmas, Easter and Halloween Events that invite the community to our Avenue for numerous, activities for Family fun and shopping.
5. Keeping our streets clean for shoppers, the community, and merchants.
6. Better communication between businesses and BID with monthly meeting attendance increasing every month.

We have a carry over from last year of \$15,000. for security cameras
We do put a \$2000.00 away each year to save for next BID renewal

2024 Budget

Provide a line-item detailed budget of projected expenses and revenues for the current calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan. The budget you provide should be approved by your Board of Directors upon time of submission. If not, please note the budget as draft and alert City staff to determine next steps.

Will the BID be requesting an annual assessment rate increase for the upcoming fiscal year of 2024/2025?

Yes

What is the proposed assessment increase for Fiscal Year 2024/2025?

5

Please provide the date of the board meeting when this assessment was approved, and describe how this decision was communicated to the BID members:

Our Annual meeting is Scheduled for June 24, 2024. All BID members will be notified by mail, about meeting voting on new Officers and Increase along with guest speakers from city.

What is the projected total assessment amount to be billed in this upcoming fiscal year of 2024/2025?

239

Lakeshore Avenue Business Improvement District
3534 Lakeshore Ave, Oakland, California 94610

LAKESHORE/LAKE PARK BID		
BUDGET FOR 2023		
Description	BID RENEWAL	2023 YTD
Income		12/31/2023
Estimated Bid Collections (FY 22/23 Assessment roll total) 5% INCREASE	<u>\$216,054.50</u>	207589.85
Carry Forward from 2021 (Reserve for Nonpayment) (Interest Bearing)	<u>\$0.00</u>	
Community Raised Funds (1.39% of Budget)	<u>\$3,045.50</u>	3000
Total Available Funds (includes \$10K grant and \$117.71 interest income)	<u><u>\$219,100.00</u></u>	210589.85
Expenditures		
Environmental/Clean/Safe/Beautiful		
Security	(\$97,000.00)	\$ 103,787.20
Street Maintenance	(\$49,500.00)	\$ 53,397.20
Gardners	(\$10,500.00)	\$ 13,130.20
Economic Vitality		
Promotions/Facebook/Instagram	(\$3,500.00)	\$ 1,471.91
Banners	(\$2,500.00)	\$ 600.00
Administration/Reserve Fees		
Administration	(\$32,837.00)	\$ 19,963.09
Office (\$1700)/ Annual Meeting (\$1800)	(\$3,500.00)	\$ 247.14
Bid Renewal (annual reserve) (business registration on budget)	(\$2,000.00)	\$ 2,000.00
Professional Expenses (Accounting \$2500/Insurance \$2300)	(\$4,800.00)	\$ 4,365.23
City Fees 3% and County Fees 3% based upon \$219,100 (business ex on budget)	(\$12,963.00)	\$5,716.20
Total Expenses	(\$219,100.00)	\$ 204,678.17
Reserve For Nonpayment (Year-End Balance)	\$0.00	\$5,911.58
Total Expenditures	(\$219,100.00)	210,589.75

Reserve set aside for OPD Resource Center @\$500/mo

3534 Lakeshore Ave, Oakland, California 94610	
LAKESHORE/LAKE PARK BID	
PROPOSED BUDGET FOR BID 2024	
Description	BID RENEWAL
<i>Income</i>	
Estimated Bid Collections (FY 23/24 Assessment roll total) 5% INCREASE	<u>\$226,855.00</u>
Carry Forward from 2023 (Reserve for Nonpayment) (Interest Bearing)	<u>\$0.00</u>
Community Raised Funds (1.39% of Budget)	<u>\$3,198.00</u>
Total Available Funds	<u>\$230,053.00</u>
<i>Expenditures</i>	
Environmental/Clean/Safe/Beautiful	
Security	(\$106,700.00)
Street Maintenance	(\$50,000.00)
Gardners	(\$10,025.00)
Economic Vitality	
Promotions/Facebook/Instagram	(\$3,150.00)
Banners	(\$2,500.00)
Administration/Reserve Fees	
Administration	(\$31,313.00)
Office (\$1700)/ Annual Meeting (\$1800)	(\$3,500.00)
Bid Renewal (annual reserve) (business registration on budget)	(\$2,000.00)
Profesional Expenses (Accounting \$2500/Insurance \$4562)	(\$7,065.00)
City Fees 3% and County Fees 3% based upon \$230,000 (business ex on budget)	(\$13,800.00)
Total Expenses	(\$230,053.00)
Reserve For Nonpayment (Year-End Balance)	\$0.00
Total Expenditures	(\$230,053.00)



Monday, April 15, 2024

BID Annual Reporting

The Business Development Division of the City of Oakland Economic and Workforce Development Department asks that you submit an Annual Report for the previous Calendar Year 2023 (CY23) - Jan 1, 2023 – Dec 31, 2023, and current Calendar Year (CY24). The information you submit via the following Annual Report will serve to summarize your BID’s programs and impacts for CY23, provide transparency regarding your organization’s sources and use of funds, and inform the City about updates to your Board and management team. The data you submit will also be used to generate aggregated information about the activities and impacts of our Business Improvement Districts in Oakland.

BID Name Laurel District Association

Contact Person and Information regarding Annual Reporting

This will not be shared publically, but rather needed for City of Oakland staff, in case of follow up questions or incomplete submissions

Name of person filling out the Annual Report Daniel Swafford

Email laureldistrictassociation@gmail.com

Phone Number (510) 452-7392

General Information & District Composition

Number of Full Time Equivelant paid staff members employed by your BID? (Including in-house and contracted) Please do not double-count staff members in multiple of the following categories.

	Number of FTE
General/Admin Staff	.6
Cleaning Ambassadors/workers	.5
Public Safety Officers/Security Ambassadors	.5
Hospitality/Business Outreach Ambassadors	.1
Other Seasonal/Part-time staff	.25
Volunteers (not counting your board members)	35

How many parcels in your BID? 102

Approximately how many residents in your BID? 100

Approximately how many occupied storefronts in your district? 106

Approximately how many vacant storefronts in your district? 19

Cleaning

Does your BID provide any supplemental cleaning services?(If you are unsure which services qualify as supplemental cleaning, check "yes" to view the list.)

Yes

Is there a workforce development component to the hiring and/or training of your cleaning staff? (either in-house or with a partner organization)

Peralta Services

What types of work is done by your cleaning staff?

Sidewalk sweeping and clearing gutters

Power Washing

Graffiti removal - public property

Graffiti removal - private property

Gum, sticker and Flyer Removal

Street furniture and trashcan maintenance and sanitization

Landscaping services and plant watering

Event-related Waste/recycling/compost sorting/collection

Cleaning Outputs & Operations

Yearly Cleaning outputs for Calendar Year 2023 by your BID: (total per year, NOT per week or month)

	Number per year
Number of incidents of graffiti removed	225
Number of bags of trash collected	1000
Pounds of trash collected (if you measure trash in pounds not bags)	0

	Number per year
Number of Incidents of illegal dumping removed	55
Number of 311 requests made	40
Number of hours of pressure washing	25
Number of stickers/posters removed	300

Which usernames, emails do you make 311 requests from? (please specify as many as you can)

Daniel Swafford; Montclair Village

Number of days per week cleaning services are provided (1-7 days/wk)

7

Number of hours per week of cleaning services provided? (eg 40 hours, 120 hrs, etc)

30

Safety Services

Does your BID provide any supplemental safety services?(If you are unsure which services qualify as supplemental safety/hospitality, check "yes" to view the list.)

Yes

Is there a workforce development component to the hiring and/or training of your safety staff? (either in-house or with a partner organization)

No

What types of work is done by your safety staff?

Installing security cameras

Monitoring security cameras

Crime prevention workshops

Street patrol/ambassadors

Coordination with OPD

Walking safety escorts

Safety Outputs & Operations

Yearly Safety outputs for Calendar Year 2023 by your BID: (total per year, NOT per week or month)

	Number
Number of annual non-patrol hours dedicated by BID administrative staff and safety ambassadors/patrol to public safety program in 2023	500
Number of annual patrol hours dedicated by public safety officers/ safety ambassadors hired by the BID to public safety program in 2023	1964
Number of merchant checks	1000
Number of 911 calls made by the BID	20
Number of non-emergency calls made by the BID	30
Number of security cameras installed by or in coordination with the BID as of Dec. 31, 2023	10
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies in 2023	18
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies prior to January 1, 2023 (if known)	100

Do you provide Safety patrol services throughout the year or just during the holidays/as needed?

Throughout the year

Regular schedule for Safety Patrol services

Day of the Week	Start Time	End Time
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		

Estimated number of security cameras to be installed by or in coordination with the BID in the District in 2024

0

Does your BID provide any supplemental streetscape/beautification services? (If you are unsure which services qualify as supplemental streetscape/beautification, check "yes" to view the list.)

Yes

What types of streetscape/beautification work is done by your BID? (including contracted and in house work)

Install/maintain planters and/or hanging baskets

Maintain tree wells

Install / mantain banners on street/light poles

Install pedestrian-oriented lighting (including stand-alone light poles and lights on private buildings that illuminate the public right of way)

Install/maintain public plazas

Install/maintain public art pieces

Streetscape/Beautification Outputs & Operations

Streetscape/Beautification outputs for Calendar Year 2023 by your BID:

	Number
Number of planters and/or hanging baskets installed and maintained	80
Number of tree wells maintained	40
Number of banners on street/light poles installed/mantained	54
Number of pedestrian-oriented lighting elements (including stand-alone light poles and lights on private buildings that illuminate the public right of way) installed	0
Number of Big Belly trashcans Installed and maintained	0
Number of public plazas installed/maintained	0
Number of public art pieces installed/maintained	12

Does your BID provide any supplemental Marketing, Events and Communications services?(If you are unsure which services qualify as supplemental marketing, events and communications services, check "yes" to view the list.)

Yes

What types of marketing and communications work is done by your BID? (including contracted and in house work)

Print news advertising (e.g. EBX, East Bay times,)

Digital advertising (e.g. Oaklandside, Google, etc)

Social media advertising (eg. promoted posts and/or Facebook, Instagram ads campaigns, partnering with influencers)

Social media posts (non-promoted)

Physical advertising (billboards, bus shelters, BART stations, etc)

Flyers & posters

Email newsletters

Publish press releases

What types of Events and District Promotions work is done by your BID? (including contracted and in house work)

Produce BID events

Sponsor/in-kind support to events produced by businesses and non-BID entities in the District

Maintain Event calendar on BID website

Input (non-BID) events in District onto BID/Visit Oakland event calendar

What types of social media platforms does your BID actively use?

Facebook

Instagram

For each of the following platforms you actively use, how many subscribers/followers do you have?

	Number of subscribers/followers as of Dec 31, 2023	Number of posts/emails sent in 2023	Total Reach/opens in 2023	Total engagement/clicks in 2023
Email Distribution List	3500	23	40000	1200
Facebook	2900	260	2600	600
Instagram	3983	260	35000	2200
Twitter	0	0	0	0
Tiktok	0	0	0	0
WhatsApp	0	0	0	0
YouTube	0	0	0	0

Average open rate for Emails in 2023: 52

Events and District Promotions Outputs & Operations

Events and District Promotions outputs for Calendar Year 2023 by your BID:

	Number
Number of events produced by the BID	12
Number of non-BID events in the District sponsored by BID or in-kind support provided by BID	8
Amount (\$\$) of Event sponsorship provided in 2023	3000
Number of attendees to events produced by or sponsored/supported by the BID (best estimate):	35000

Business Support

Does your BID provide any supplemental Business Support services?(If you are unsure which services qualify as supplemental Business Support services, check "yes" to view the list.)

Yes

What kinds of initiatives did your BID implement to support existing businesses in your district

Information Sessions on federal/state/city regulations or programs (e.g.)

Social Events (e.g. networking events, meet & greets, sector meet-ups)

Educational Events (e.g. speaker series, panels, roundtables, best practice sharing)

Business Support Outputs & Operations

Business Support outputs for Calendar Year 2023 by your BID:

	Number
Number of merchant contacts	1000
Number of business support events coordinated by or supported by the BID for your businesses in 2023	2
Annual total number of your business attendees to business support events coordinated by or supported by the BID	40

BID 2023 Accomplishments & Plans for 2024

Please list out the BID's top accomplishments from 2023, as well as note-worthy new projects, services and plans for 2024. This is your chance to brag about your BID's impact! List at least three, and up to ten for each year.

Top Accomplishments or New programs/activities accomplished in 2023

Accomplishment/New activity description
Trash Can Repair (18)
Custom art from Oakland artist on 11 trash cans
Live In The Laurel monthly concert series
Holiday Safety Ambassador Program and comprehensive data analysis

New programs/activities planned for 2024 calendar year (that the BID didn't do in 2023)

New program/activity description
Live in the Laurel Music Series
Street Pole Banner Art
Laurel Mural Tour

BID Financials

2023 Budget versus Actuals

Provide a line-item detailed budget versus actuals document of your BID expenses and revenues from the 2023 (already completed) calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan.

Upload your BID's 2023 line-item detailed budget versus actuals document here:

2023 Laurel_BID_Budget toxlsx

Please provide the Surplus or Deficit amount from the previous calendar year of 2023 that was carried over into 2024. If there is a surplus, please describe your plans for how it will be spent (eg. Operational reserves, etc)

\$13,282 Carryover into safety and security as there is currently a safety crisis in Oakland, especially in commercial districts.

2024 Budget

Provide a line-item detailed budget of projected expenses and revenues for the current calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan. The budget you provide should be approved by your Board of Directors upon time of submission. If not, please note the budget as draft and alert City staff to determine next steps.

Upload your BID's 2024 line-item detailed budget document here, as approved by your BID's Board of Directors:

2024 Laurel_BID_Budget.xlsx

For the 2024 Calendar Year, please provide the estimated amounts and sources of any contributions to be made from sources other than BID assessments to be levied. Eg. donations, grant funding, etc.

Estimated Amount (\$)	Source of Contribution
100000	Event Income
50000	Grant Funding
4000	Interest income

Will the BID be requesting an annual assessment rate increase for the upcoming fiscal year of 2024/2025?

No

What is the projected total assessment amount to be billed in this upcoming fiscal year of 2024/2025?

232828.13

Board of Directors Roster 2023/2024 (list all directors that served anytime during 2023 or 2024)

Name	Affiliation Type	Name of Affiliated Business/Org	Title	Status
Jain Williams	Property Owner/Rep	State Farm Insurance	President	Current
Joanne Wong-Lam	Property Owner/Rep		Secretary	Current
Dorothy Okamoto	Property Owner/Rep		Treasurer	Current
Alysia Gritz	Property Owner/Rep	Marquardt Property Management	Director	Current
Kao Saelee	Business Owner/Rep	Jo's Modern Thai	Director	Current
Lorie Mata	Property Owner/Rep		Director	Current
Jonathan Evans	Community Member/Rep		Director	Past
Toshia Thompson	Business Owner/Rep	Savvy The Salon	Director	Past
Vincent Phua	Property Owner/Rep		Director	Current
Zinzi Zareef	Business Owner/Rep	Mizaan Boutique	Director	Current

Laurel District Association 2023 Budget			
	Projected	Actual	
INCOME			
Projected Assessments 2023	\$ 232,828.13	\$ 211,921.52	
Estimated Income from Other Sources - Grants	\$ -	\$ 50,637.50	Direct Community Grant, was spent mainly in 2022 on Ambassadors
Estimated Income from Other Sources - Events	\$ 45,000.00	\$ 167,898.94	
Estimated Income from Other Sources - Interest, Donations/ Direct	\$ 10,000.00	\$ 10,128.00	
Carryover 2022	\$ 1,000.00	\$ 3,853.14	
Total BID Balance for 2023	\$ 288,828.13	\$ 444,479.10	
	2023 Budget	2023 Actual	Notes
EXPENSES			
Organization			
Rent	\$ 1,200	\$ 2,100.00	
Staffing	\$52,000	\$ 52,000.00	
Payroll Expenses	\$1,500	\$ 1,419.29	
Grant Program Administration	\$0	\$ 24,940.93	Won grants admin
Telephone & Fax	\$900	\$ 900.00	
Internet	\$0		see rent
Insurance	\$6,000	\$ 3,142.28	
Accounting & Taxes	\$2,500	\$ 2,650.00	
Bank Charges/Interest			
Annual Dinner/Merchant Meetings/Memberships	\$1,000	\$ -	Deferred due to safety crisis
Office Supplies	\$1,000	\$ 1,152.63	
Postage	\$300	\$ 285.00	
Printing	\$3,600	\$ 3,600.00	
Unallocated/Misc	\$0		
Subtotal	\$69,900	\$ 92,181.13	
DISI General			
Website & Graphic Design	\$3,000	\$ 3,000.00	
Directory	\$2,000	\$ -	Deferred due to safety crisis
Signage/Banners/Artwork/Decorations*	\$11,500		
Merchant & Social Media	\$5,000	\$ 277.75	
Special Events & Marketing	\$12,000	\$ 29,350.33	Increased sponsor/vendor revenue for small events required increased expenses for production
Street Festival	\$100,000	\$ 123,924.58	Increased sponsor/vendor revenue for LSP required increased expenses for production
Advertising	\$7,400		
Security	\$38,500	\$ 104,798.20	Grant funded Holiday Safety Ambassador Program: Grant funding payment received in 2024 (\$93,700) of which \$66,298.20 was spent in 2023. \$38,500 of Assessment funds are directed to the annual (12 month) security program
Unallocated			
Subtotal	\$179,400	\$ 261,350.86	
PROWSO			
Maintenance and Landscaping	\$43,000	\$ 44,406.86	
Capital Improvements	\$26,000	\$ 22,510.00	
Unallocated			
Subtotal	\$69,000	\$ 66,916.86	
OTHER			
County Fee (1.7%)	\$2,888	\$ 3,602.67	
City Fee	\$600	\$ 2,119.00	1%
Subtotal	\$3,388	\$ 5,721.67	
Contingency Reserves	\$9,785	\$ 10,500.00	- 5% of Assessment
Total Expenses	\$330,473	\$ 436,470.52	
Carryover		\$ 8,008.58	

Laurel District Association 2024 Budget		
INCOME	Projected	Actual
Projected Assessments 2024	\$ 232,828.13	
Estimated Income from Other Sources - Grants	\$ 50,000.00	
Estimated Income from Other Sources - Events	\$ 100,000.00	
Estimated Income from Other Sources - Interest	\$ 10,000.00	
Carryover 2023	\$ 13,000.00	
Total BID Balance for 2023	\$ 405,828.13	\$ -
	2024 Budget	2024 Actual
EXPENSES		
Organization		
Rent	\$ 2,100	
Staffing	\$52,000	
Payroll Expenses	\$2,500	
Grant Program Administration	\$15,000	
Telephone & Fax	\$900	
Internet	\$0	
Insurance	\$6,000	
Accounting & Taxes	\$2,500	
Bank Charges/Interest		
Annual Dinner/Merchant Meetings/Memberships	\$1,000	
Office Supplies	\$1,000	
Postage	\$300	
Printing	\$3,500	
Unallocated/Misc	\$0	
Subtotal	\$86,800	\$ -
DISI General		
Website & Graphic Design	\$3,000	
Directory	\$2,000	
Signage/Banners/Artwork/Decorations*	\$16,000	
Merchant & Social Media	\$5,000	
Special Events & Marketing	\$20,000	
Street Festival	\$100,000	
Advertising	\$7,400	
Security	\$45,000	
Unallocated		
Subtotal	\$198,400	\$ -
PROWSO		
Maintenance and Landscaping	\$43,000	
Capital Improvements	\$28,000	
Unallocated		
Subtotal	\$71,000	\$ -
OTHER		
County Fee (1.7%)	\$3,958	
City Fee	\$3,492	
Suspense	\$9,785	
Subtotal	\$17,235	\$ -
Contingent Reserves		
Total Expenses	\$373,435	\$ -
Carryover	\$ 32,393.13	\$ -



BID Annual Reporting

The Business Development Division of the City of Oakland Economic and Workforce Development Department asks that you submit an Annual Report for the previous Calendar Year 2023 (CY23) - Jan 1, 2023 – Dec 31, 2023, and current Calendar Year (CY24). The information you submit via the following Annual Report will serve to summarize your BID’s programs and impacts for CY23, provide transparency regarding your organization’s sources and use of funds, and inform the City about updates to your Board and management team. The data you submit will also be used to generate aggregated information about the activities and impacts of our Business Improvement Districts in Oakland.

BID Name Oakland Convention and Visitors Bureau

Contact Person and Information regarding Annual Reporting

This will not be shared publically, but rather needed for City of Oakland staff, in case of follow up questions or incomplete submissions

Name of person filling out the Annual Report Brook Yciano

Email brook@visitoakland.com

Phone Number (209) 740-6634

General Information & District Composition

Number of Full Time Equivelant paid staff members employed by your BID? (Including in-house and contracted) Please do not double-count staff members in multiple of the following categories.

	Number of FTE
General/Admin Staff	5.3
Cleaning Ambassadors/workers	0
Public Safety Officers/Security Ambassadors	0
Hospitality/Business Outreach Ambassadors	0
Other Seasonal/Part-time staff	0
Volunteers (not counting your board members)	0

Notes about staffing numbers

FTE for staffing represents the split of Visit Oakland staff and consultants between Measure C funding

and TBID funding.

Consultants include, marketing, finance, HR, governance, public relationships, and partnerships.

How many parcels in your BID? 26

Approximately how many residents in your BID? 26

Approximately how many occupied storefronts in your district? 26

Approximately how many vacant storefronts in your district? 5

Cleaning

Does your BID provide any supplemental cleaning services?(If you are unsure which services qualify as supplemental cleaning, check "yes" to view the list.)

No

Cleaning Outputs & Operations

Safety Services

Does your BID provide any supplemental safety services?(If you are unsure which services qualify as supplemental safety/hospitality, check "yes" to view the list.)

No

Safety Outputs & Operations

Does your BID provide any supplemental streetscape/beautification services? (If you are unsure which services qualify as supplemental streetscape/beautification, check "yes" to view the list.)

No

Streetscape/Beautification Outputs & Operations

Does your BID provide any supplemental Marketing, Events and Communications services?(If you are unsure which services qualify as supplemental marketing, events and communications services, check "yes" to view the list.)

Yes

What types of marketing and communications work is done by your BID? (including contracted and in house work)

Print news advertising (e.g. EBX, East Bay times,)

Digital advertising (e.g. Oaklandside, Google, etc)

Social media advertising (eg. promoted posts and/or Facebook, Instagram ads campaigns, partnering with influencers)

Social media posts (non-promoted)

Physical advertising (billboards, bus shelters, BART stations, etc)

Direct mailings

Flyers & posters

Email newsletters

Publish press releases

What types of Events and District Promotions work is done by your BID? (including contracted and in house work)

Produce BID events

Sponsor/in-kind support to events produced by businesses and non-BID entities in the District

Maintain Event calendar on BID website

Input (non-BID) events in District onto BID/Visit Oakland event calendar

Produce District Guides/maps (including digital or printed)

What types of social media platforms does your BID actively use?

Facebook

Instagram

LinkedIn

YouTube

TikTok

Threads

For each of the following platforms you actively use, how many subscribers/followers do you have?

	Number of subscribers/followers as of Dec 31, 2023	Number of posts/emails sent in 2023	Total Reach/opens in 2023	Total engagement/clicks in 2023
Email Distribution List	23614	75	130200	9200
Facebook	25255	247	1900000	41400
Instagram	59213	1485	1400000	401000
Twitter	0	0	0	0
Tiktok	412	42		
WhatsApp	0	0	0	0

	Number of subscribers/followers as of Dec 31, 2023	Number of posts/emails sent in 2023	Total Reach/opens in 2023	Total engagement/clicks in 2023
YouTube	820	17	0	0

Average open rate for Emails in 2023: 54.55

Events and District Promotions Outputs & Operations

Events and District Promotions outputs for Calendar Year 2023 by your BID:

	Number
Number of events produced by the BID	5
Number of non-BID events in the District sponsored by BID or in-kind support provided by BID	17
Amount (\$\$) of Event sponsorship provided in 2023	166500
Number of attendees to events produced by or sponsored/supported by the BID (best estimate):	60455

Business Support

Does your BID provide any supplemental Business Support services?(If you are unsure which services qualify as supplemental Business Support services, check "yes" to view the list.)

Yes

What kinds of initiatives did your BID implement to support existing businesses in your district

Social Events (e.g. networking events, meet & greets, sector meet-ups)

Partnership Promotions for Kind Traveler, Amtrak, BART, SF Bay Ferry, Bay Crossing, Oakland Airport, Southwest Airlines, and Oakland Restaurants and Shops are promoted through out the year, we have Oakland Restaurant Week, Shop Local (Oakland Businesses), Oakland Style, Chef Highlights

Business Support Outputs & Operations

Business Support outputs for Calendar Year 2023 by your BID:

	Number
Number of merchant contacts	1

	Number
Number of business support events coordinated by or supported by the BID for your businesses in 2023	1
Annual total number of your business attendees to business support events coordinated by or supported by the BID	1

BID 2023 Accomplishments & Plans for 2024

Please list out the BID's top accomplishments from 2023, as well as note-worthy new projects, services and plans for 2024. This is your chance to brag about your BID's impact! List at least three, and up to ten for each year.

Top Accomplishments or New programs/activities accomplished in 2023

Accomplishment/New activity description
<p>Oakland Style: In October 2023, Visit Oakland introduced Oakland Style, an annual fall extravaganza celebrating the essence of The Town through art, fashion, music, cuisine, and culture. The inaugural five-day event garnered significant attention, attracting a total of 274,000 active users to our website, engaging 345,000 social media accounts, and amassing over 396,000 views on reels and videos. The event sold out its diverse array of unique activities, fostering a dynamic atmosphere that resonated with both residents and tourists, revitalizing Oakland's cultural landscape.</p>
<p>2023 Marketing Accomplishments: In 2023, Visit Oakland made significant strides in marketing, including the creation of dedicated landing pages for key citywide events and initiatives such as Lunar New Year, Black History Month, Juneteenth, AAPI Heritage Month, and Hispanic Heritage Month. The organization's social media presence experienced notable growth, surpassing 100,000 users across various channels and reaching 3.4 million accounts. A TikTok account was successfully launched, expanding the reach to a new platform. The Visit Oakland website maintained strong performance, attracting 1.03 million active users and generating over 1.3 million sessions. Moreover, the consumer newsletter subscriber list expanded to over 13,600 subscribers, achieving an impressive 42% open rate. Inspiration Guide Produced our new 2023 Inspiration Guide showcasing more than 80 local businesses, highlights 25 members of our community, and shares The Town with more than 3 million annual viewers.</p>
<p>Oakland Restaurant Week: In 2023, Oakland Restaurant Week showcased the city's culinary scene with 130 participating restaurants and garnered significant online engagement, with 159,000 pageviews on the event's website. Social media outreach was robust, reaching 429,000 accounts, and reels/videos amassed 537,000 views. The event received extensive media coverage, with 31 placements and appearances in just 14 days, reaching an impressive audience of 79.2 million. Overall, Oakland Restaurant Week was successfully promoted, generating media impressions totaling 24.5 million.</p>

Accomplishment/New activity description

Michelin Event In 2023, Visit Oakland brought MICHELIN to Oakland where more than 200 chefs from across California came to The Town for the Michelin Star Awards Ceremony. The event was held at Chabot Space and Science Center - under the stars.

Think Oakland First In 2023, Visit Oakland planned the "Think Oakland First" Holiday campaign and showcased many Oakland businesses as we encouraged our residents and visitors to shop local.

James Beard Platform Event with Oakland Chefs in New York Took Oakland Chefs to New York City to cook at the James Beard Platform space and showcase Oakland to media and New York City residences to encourage travel to Oakland.

Public Relations Highlights: Collaborated with CBS Travel Correspondent Peter Greenberg on an Oakland radio show and television segment, extending our reach to a national audience of 250 million. Welcomed nine writers and influencers from the Black Travel Alliance for a three-day immersion in Oakland. Their social media content and blog posts highlighted the city's attractions, restaurants, and event venues, amplifying Oakland's appeal. Created a kid-friendly coloring sheet featuring Oakland's local attractions, engaging younger audiences and promoting community involvement. Secured extensive media coverage throughout the year, spotlighting Oakland's neighborhoods and community, resulting in an impressive 1.2 billion impressions.

Sales Highlights for 2023: Successfully hosted the Northern California Meeting Professionals International Annual Conference & Expo at the Oakland Convention Center, engaging 450 professional meeting planners and suppliers through a dynamic trade show and sessions. Exhibited and hosted seventeen (17) trade shows and client events across various markets including corporate, association, government, leisure, and sports. Participated in the Blue Shield Employee Town Hall meeting, providing local restaurant, hotel, and activity information to headquarters employees. Distributed "Travel Safely" safety tips to meeting professionals and community members in hotels and venues, enhancing Oakland's reputation as a desirable city for meetings. Hosted a familiarization trip for the Black Travel Alliance travel managers, promoting hotels and venues for future group bookings and individual travel. Sponsored the Municipal Association of Women in Northern California annual meeting and the East Bay Chapter of the American Institute of Architects, supporting women in government and architectural professionals. Hosted the Professional Convention Management Association at the Oakland Coliseum and organized a breakfast meeting at Kissel Uptown Oakland. Hosted the California Society of Association Executives Bay Area Council chapter meeting, fostering networking and collaboration among association executives in the region.

Accomplishment/New activity description

Partnerships Accomplishments: Developed the following 2023 Strategic Partnerships to amplify marketing efforts and increase visitors to Oakland Wanderlust Content Studio - created partnership for Visit Oakland's 2023 Inspiration Guide Kind Traveler - created partnership to participate in a Visit California Campaign BART - collaborated on partnership for Oakland Restaurant week and Art Murmur's East Bay Open Studios to highlight Oakland Art galleries and Studios Amtrak San Joaquins - worked together to create a Black Joy Parade Getaway Giveaway SF Bay Ferry - developed partnership which allows Visit Oakland to promote on their digital marketing screens Bay Crossings SF Ferry Bldg - began partnership to promote Oakland on their marketing screens and to have our VO rack cards available in the SF Ferry Building Oakland Airport - developed partnership to have digital screen opportunities to promote various Oakland Community events as well as welcome signs for event attendees

New programs/activities planned for 2024 calendar year (that the BID didn't do in 2023)

New program/activity description

2024 Public Relations and Communications Outlook: • Welcoming 16 International journalists to showcase Oakland as California's Culinary Playground in partnership with Visit California. • Secured feature that will include Oakland's Chinatown neighborhood in AFAR – one of the leading travel publications that reaches 34 million readers. The story will run in 2024. • Expanding the second annual Oakland Style event taking place October 9 – 13, 2024. • Taking Oakland on the road to promote The Town in Mexico City, New York, Los Angeles, Sacramento and other feeder markets.

2024 Sales Outlook: • Host a familiarization rip with Volaris Airlines for wholesale tour operators from San Salvador; Volaris Airlines has direct flights to OAK from El Salvador and Mexico City. • Participate in Tour Connection; travel show focusing on all aspects of the entertainment market. • Hosting professional clients at an event in Sacramento promoting Oakland has a premier destination to conduct meetings and events. • Conduct (17) seventeen trade shows & client events in the corporation, association, sports, entertainment, leisure and government markets. • Sponsor association groups that bring group business to Oakland.

2024 Partnership Outlooks: Identify multicultural marketing opportunities, including outreach to various affinity groups and organizations to promote community events and overnight hotel stays. Collaborate with Amtrak Capitol Corridor to increase visitors from Sacramento to Oakland. Develop a partnership with the new owners of the Oakland Marathon and cross-promote Oakland Restaurant Week. Work closely with Delta Airlines to promote the new ATL-OAK daily nonstop flight starting June 7, 2024. Focus on offsetting overhead costs for Visit Oakland's Signature Events through prospecting and developing partnerships.

New program/activity description


2024 Marketing Outlook: Launch the "Love our Lake" campaign in partnership with Fairyland and the OMCA to promote events at Lake Merritt. Introduce the "Oakland Summer Vibes" campaign from Memorial Day through Labor Day, highlighting summer activities in Oakland.

BID Financials

2023 Budget versus Actuals

Provide a line-item detailed budget versus actuals document of your BID expenses and revenues from the 2023 (already completed) calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan.

Upload your BID's 2023 line-item detailed budget versus actuals document here:

 Visit Oakland Financials (Sta... .xlsx

 Visit Oakland Financials (Sta... .xlsx


Please provide the Surplus or Deficit amount from the previous calendar year of 2023 that was carried over into 2024. If there is a surplus, please describe your plans for how it will be spent (eg. Operational reserves, etc)

Of the total surplus, 3% contingency was help as operating reserves, the remaining \$60,656 will be used to fund FY 23-24 TBID activities. It typically takes 90 days to receive an update on total revenue collected for a specific month and payments are made 90-120 days after a month ends. Not knowing the revenue total and knowing there is a delay in payments, we do try to be on the conservative side to avoid cash flow problems.

2024 Budget

Provide a line-item detailed budget of projected expenses and revenues for the current calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan. The budget you provide should be approved by your Board of Directors upon time of submission. If not, please note the budget as draft and alert City staff to determine next steps.

Upload your BID's 2024 line-item detailed budget document here, as approved by your BID's Board of Directors:

 Visit Oakland Board Approve... .xlsx

 Visit Oakland Current 2023-2... .pdf

For the 2024 Calendar Year, please provide the estimated amounts and sources of any contributions to be made from sources other than BID assessments to be levied. Eg. donations, grant funding, etc.

Estimated Amount (\$)	Source of Contribution
6000	Sponsorships

Will the BID be requesting an annual assessment rate increase for the upcoming fiscal year of 2024/2025?

No

What is the projected total assessment amount to be billed in this upcoming fiscal year of 2024/2025?

0

**Board of Directors Roster 2023/2024
(list all directors that served anytime during 2023 or 2024)**

Name	Affiliation Type	Name of Affiliated Business/Org	Title	Status
Dhruv Patel (Board Chair)	Property Owner/Rep	Ridgemo nt Hospitality	President	Current
John Albrecht (past Chair)	Business Owner/Rep	Port of Oakland	Other Officer	Current
Peter DePaschalis	Business Owner/Rep	Southwe st Airlines	Secretary	Current
John March	Business Owner/Rep	District Oakland	Treasurer	Current



Board of Directors

Home / About

Board of Directors Executive Committee

Dhruv Patel	Chair	Ridgmont Hospitality
John Albrecht	Immediate Past Chair	Port of Oakland
Peter DePaschalis	Secretary	Southwest Airlines
John Marsh	Chief Financial Officer	District Oakland
Thomas Cavanagh	Vice Chair	BANDALOOP
Gyasi Edwards	Vice Chair	HotelEngine
Kurt Hanson	Vice Chair	Oakland Marriott City Center
Bharat Lugani	Vice Chair	Hilton Oakland Airport
Jana Pastena	Vice Chair	Calavera at OAK
Edward Roe	Vice Chair	Claremont Club & Spa, A Fairmont Hotel
Barbara Leslie	Advisor to the CEO	Oakland Metropolitan Chamber of Commerce

Board of Directors

Kenneth Aglubat	Regional Director of Operations	Ridgmont Hospitality
Dennis Berris	General Manager	Homewood Suites by Hilton Oakland-Waterfront
Carl Chan	President	Oakland Chinese Chamber of Commerce
Nik Dehejia	Chief Executive Officer	Oakland Zoo
James Dinnall	General Manager	The Waterfront Hotel
Barney Fonzi	President	Diablo Publications
Susan Garcia	General Manager	Kissel Hotel Uptown
Mieko Hatano	Executive Director	Oakland Symphony
Savlan Hauser	Executive Director	Jack London Improvement District
Josh Howard	Dual General Manager	AC Hotel & Residence Inn Downtown Oakland
Tyrell Johnson	General Manager	Courtyard Downtown Oakland
L. Autumn King	Senior Director of Marketing & Communications	Oakland Museum of California
John Lauritsen	General Manager	Oakland Moxy
Kymberly Miller	Executive Director	Children's Fairyland
Bryan Osaki	General Manager	Best Western Plus Bayside Hotel
Nikhil Patel	General Manager	Westward Lodge
Adam Tobin	Executive Director & CEO	Chabot Space & Science Center
Angela Tsay	CEO & Creative Director	Oaklandish Never Elsewhere BOSK Oakland Supply Co.

[Click here](#) to review the bylaws of the Oakland Convention and Visitors Bureau.



About

Visit Oakland is a private, not-for-profit, 501(c)(6) organization, with a 21-member board of directors and full time staff. Visit Oakland is funded by a dedicated hotel tax, Measure C...



Contact Us

Contact Visit Oakland for sales, marketing, media, and general inquiries.



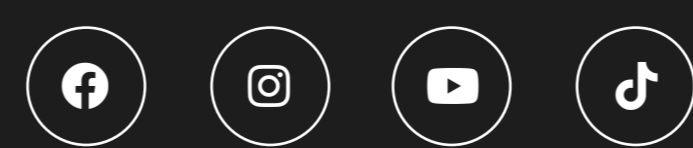
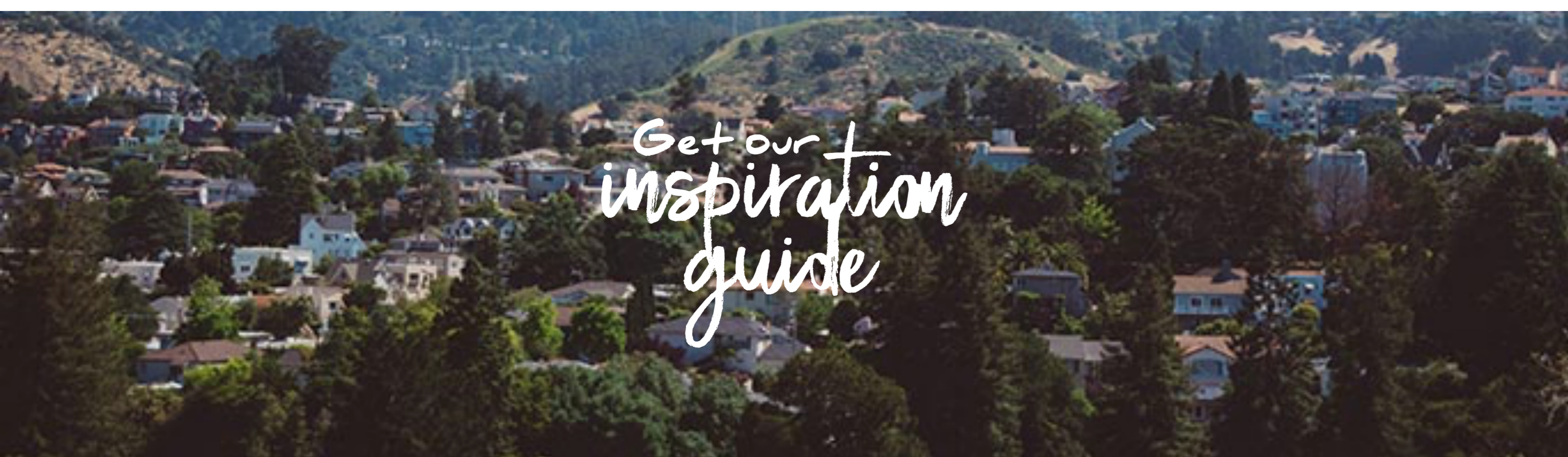
Staff

Find contact information in our staff directory here.



Meetings & Agendas

Find a full list of upcoming partner meetings here.





Monday, April 15, 2024

BID Annual Reporting

The Business Development Division of the City of Oakland Economic and Workforce Development Department asks that you submit an Annual Report for the previous Calendar Year 2023 (CY23) - Jan 1, 2023 – Dec 31, 2023, and current Calendar Year (CY24). The information you submit via the following Annual Report will serve to summarize your BID’s programs and impacts for CY23, provide transparency regarding your organization’s sources and use of funds, and inform the City about updates to your Board and management team. The data you submit will also be used to generate aggregated information about the activities and impacts of our Business Improvement Districts in Oakland.

BID Name Temescal Telegraph Business Improvement District (TTBID)

Contact Person and Information regarding Annual Reporting

This will not be shared publically, but rather needed for City of Oakland staff, in case of follow up questions or incomplete submissions

Name of person filling out the Annual Report Daniel Swafford

Email swafforddaniel@gmail.com

Phone Number (510) 452-7392

General Information & District Composition

Number of Full Time Equivelant paid staff members employed by your BID? (Including in-house and contracted) Please do not double-count staff members in multiple of the following categories.

	Number of FTE
General/Admin Staff	.75
Cleaning Ambassadors/workers	3
Public Safety Officers/Security Ambassadors	3
Hospitality/Business Outreach Ambassadors	5
Other Seasonal/Part-time staff	.5
Volunteers (not counting your board members)	10

How many parcels in your BID? 611

Approximately how many residents in your BID? 0

Approximately how many occupied storefronts in your district? 194

Approximately how many vacant storefronts in your district? 12

Cleaning

Does your BID provide any supplemental cleaning services?(If you are unsure which services qualify as supplemental cleaning, check "yes" to view the list.)

Yes

Is there a workforce development component to the hiring and/or training of your cleaning staff? (either in-house or with a partner organization)

No

What types of work is done by your cleaning staff?

Sidewalk sweeping and clearing gutters

Power Washing

Graffiti removal - public property

Graffiti removal - private property

Gum, sticker and Flyer Removal

Street furniture and trashcan maintenance and sanitization

Landscaping services and plant watering

Event-related Waste/recycling/compost sorting/collection

Auto glass clean up

Cleaning Outputs & Operations

Yearly Cleaning outputs for Calendar Year 2023 by your BID: (total per year, NOT per week or month)

	Number per year
Number of incidents of graffiti removed	2826
Number of bags of trash collected	4398

	Number per year
Pounds of trash collected (if you measure trash in pounds not bags)	0
Number of Incidents of illegal dumping removed	0
Number of 311 requests made	300
Number of hours of pressure washing	199
Number of stickers/posters removed	1493

Which usernames, emails do you make 311 requests from? (please specify as many as you can)

Daniel Swafford, Montclair Village

Number of days per week cleaning services are provided (1-7 days/wk)

7

Number of hours per week of cleaning services provided? (eg 40 hours, 120 hrs, etc)

120

Safety Services

Does your BID provide any supplemental safety services?(If you are unsure which services qualify as supplemental safety/hospitality, check "yes" to view the list.)

Yes

Is there a workforce development component to the hiring and/or training of your safety staff? (either in-house or with a partner organization)

No

What types of work is done by your safety staff?

Installing security cameras

Monitoring security cameras

Crime prevention workshops

Street patrol/ambassadors

Coordination with OPD

Hotline for visitors, merchants, residents to call to request immediate assistance

Walking safety escorts

Safety Outputs & Operations

Yearly Safety outputs for Calendar Year 2023 by your BID: (total per year, NOT per week or month)

	Number
Number of annual non-patrol hours dedicated by BID administrative staff and safety ambassadors/patrol to public safety program in 2023	20
Number of annual patrol hours dedicated by public safety officers/ safety ambassadors hired by the BID to public safety program in 2023	0
Number of merchant checks	1000
Number of 911 calls made by the BID	100
Number of non-emergency calls made by the BID	3
Number of security cameras installed by or in coordination with the BID as of Dec. 31, 2023	0
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies in 2023	4
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies prior to January 1, 2023 (if known)	0

Do you provide Safety patrol services throughout the year or just during the holidays/as needed?

As needed

Estimated number of security cameras to be installed by or in coordination with the BID in the District in 2024

0

Does your BID provide any supplemental streetscape/beautification services? (If you are unsure which services qualify as supplemental streetscape/beautification, check "yes" to view the list.)

Yes

What types of streetscape/beautification work is done by your BID? (including contracted and in house work)

Install/maintain planters and/or hanging baskets

Maintain tree wells

Install / mantain banners on street/light poles

Install pedestrian-oriented lighting (including stand-alone light poles and lights on private buildings that illuminate the public right of way)

Install/maintain public plazas

Install/maintain public art pieces

Streetscape/Beautification Outputs & Operations

Streetscape/Beautification outputs for Calendar Year 2023 by your BID:

	Number
Number of planters and/or hanging baskets installed and maintained	604
Number of tree wells maintained	813
Number of banners on street/light poles installed/maintained	80
Number of pedestrian-oriented lighting elements (including stand-alone light poles and lights on private buildings that illuminate the public right of way) installed	0
Number of Big Belly trashcans Installed and maintained	0
Number of public plazas installed/maintained	0
Number of public art pieces installed/maintained	0

Does your BID provide any supplemental Marketing, Events and Communications services?(If you are unsure which services qualify as supplemental marketing, events and communications services, check "yes" to view the list.)

Yes

What types of marketing and communications work is done by your BID? (including contracted and in house work)

Print news advertising (e.g. EBX, East Bay times,)

Digital advertising (e.g. Oaklandside, Google, etc)

Social media advertising (eg. promoted posts and/or Facebook, Instagram ads campaigns, partnering with influencers)

Social media posts (non-promoted)

Flyers & posters

Email newsletters

Publish press releases

What types of Events and District Promotions work is done by your BID? (including contracted and in house work)

Produce BID events

Sponsor/in-kind support to events produced by businesses and non-BID entities in the District

Maintain Event calendar on BID website

Input (non-BID) events in District onto BID/Visit Oakland event calendar

What types of social media platforms does your BID actively use?

Facebook

Instagram

For each of the following platforms you actively use, how many subscribers/followers do you have?

	Number of subscribers/followers as of Dec 31, 2023	Number of posts/emails sent in 2023	Total Reach/opens in 2023	Total engagement/clicks in 2023
Email Distribution List	3000	15	1500	240
Facebook	4000	100	10000	200
Instagram	8005	100	20000	400
Twitter	0	0	0	0
Tiktok	0	0	0	0
WhatsApp	0	0	0	0
YouTube	0	0	0	0

Average open rate for Emails in 2023: 50

Events and District Promotions Outputs & Operations

Events and District Promotions outputs for Calendar Year 2023 by your BID:

	Number
Number of events produced by the BID	2
Number of non-BID events in the District sponsored by BID or in-kind support provided by BID	5
Amount (\$\$) of Event sponsorship provided in 2023	0
Number of attendees to events produced by or sponsored/supported by the BID (best estimate):	2000

Business Support

Does your BID provide any supplemental Business Support services?(If you are unsure which services qualify as supplemental Business Support services, check "yes" to view the list.)

Yes

What kinds of initiatives did your BID implement to support existing businesses in your district

Information Sessions on federal/state/city regulations or programs (e.g.)

Social Events (e.g. networking events, meet & greets, sector meet-ups)

Educational Events (e.g. speaker series, panels, roundtables, best practice sharing)

Business Support Outputs & Operations

Business Support outputs for Calendar Year 2023 by your BID:

	Number
Number of merchant contacts	1000
Number of business support events coordinated by or supported by the BID for your businesses in 2023	2
Annual total number of your business attendees to business support events coordinated by or supported by the BID	50

BID 2023 Accomplishments & Plans for 2024

Please list out the BID's top accomplishments from 2023, as well as note-worthy new projects, services and plans for 2024. This is your chance to brag about your BID's impact! List at least three, and up to ten for each year.

Top Accomplishments or New programs/activities accomplished in 2023

Accomplishment/New activity description
Earth Day Community Clean Up
Shop Safe Oakland
Temescal Roots Project
Temescal Trick or Treat
Freedom Farmers Market

New programs/activities planned for 2024 calendar year (that the BID didn't do in 2023)

New program/activity description
Small Event Series
Music on the streets
Return of Taste of Temescal

BID Financials

2023 Budget versus Actuals

Provide a line-item detailed budget versus actuals document of your BID expenses and revenues from the 2023 (already completed) calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan.

Upload your BID's 2023 line-item detailed budget versus actuals document here:



Please provide the Surplus or Deficit amount from the previous calendar year of 2023 that was carried over into 2024. If there is a surplus, please describe your plans for how it will be spent (eg. Operational reserves, etc)

Remaining funds from 2023 total \$ \$299,000.45 which will be used for operational costs in 2024.

2024 Budget

Provide a line-item detailed budget of projected expenses and revenues for the current calendar year, organized into the expense/revenue categories and percentages that were in approved in your management plan. The budget you provide should be approved by your Board of Directors upon time of submission. If not, please note the budget as draft and alert City staff to determine next steps.

Upload your BID's 2024 line-item detailed budget document here, as approved by your BID's Board of Directors:



For the 2024 Calendar Year, please provide the estimated amounts and sources of any contributions to be made from sources other than BID assessments to be levied. Eg. donations, grant funding, etc.

Estimated Amount (\$)	Source of Contribution
93501.00	Event Income
4472.35	Interest Income

Will the BID be requesting an annual assessment rate increase for the upcoming fiscal year of 2024/2025?

No

What is the projected total assessment amount to be billed in this upcoming fiscal year of 2024/2025?

723582.49

Board of Directors Roster 2023/2024 (list all directors that served anytime during 2023 or 2024

Name	Affiliation Type	Name of Affiliated Business/Org	Title	Status
Pat Smith	Property Owner/R ep		President	Current

Name	Affiliation Type	Name of Affiliated Business/Org	Title	Status
Daniel Chung	Business Owner/Rep	Root'd in the 510	VP	Current
Jordie Bornstein	Community Member/Rep		VP	Current
Don Macleay	Property Owner/Rep		Treasurer	Current
Tom Murphy	Property Owner/Rep	MurphyFinancing.com	Secretary	Current
Seung-Yen Hong	Business Owner/Rep	BART		Current
Alex Schafran	Business Owner/Rep			Current
Jessica Arline	Business Owner/Rep	Children's Hospital		Current
Adraina Valencia	Community Member/Rep			Current
Emil Peinert	Business Owner/Rep	Kingfish Pub & Cafe		Past
Tom Ames	Community Member/Rep			Current

Temescal Telegraph BID			
Budget--Actuals 2023			
	Projection TTL	Actual	
Income			
5490 Miscellaneous revenue	\$ -		
BID Assessments	\$ 723,582.49	720,331.74	
Event Income	\$ 90,000.00	0	
Interest Income	\$ 4,000.00	4,384.99	
Special Projects Revenue	\$ -	26,685.00	
Total Income	\$ 817,582.49	\$751,401.73	
Expenses			
100 PROWSO			
Cleaning/maintenance contract	\$ 266,000.00	296,745.12	
Management contract (PROWSO) [New]	\$ 8,800.00		
PR1 - Executive Director Fees	\$ 21,703.31	21,436.56	
PR2 - Admin Assistant	\$ 12,480.00	7,200.00	
PR4 - Operations Director	\$ 66,000.00	57,304.13	
PROWSO Ped Lighting Debt Service	\$ 5,447.00	4,085.25	
Security	\$ 11,283.15	8,462.36	
Ped Lighting Principal	\$ 113,998.08		
Total 100 PROWSO	\$ 505,711.54	\$395,233.42	
200 Mkting & Identity Enhancement			
Executive Directors Fees	\$ 13,514.79	15,329.50	
Farmers Market	\$ 1,122.28	2,167.42	
Halloween Event	\$ 334.10	0	
Holiday Event	\$ 6,695.00	1,718.05	
Management contract (Marketing) [New]	\$ 5,600.00		
Mkting Ped Lighting Debt Service	\$ 3,478.12	2,608.59	
PR2 - Admin Assistant	\$ 10,085.21	13,281.07	
PR3 - Events Assistant	\$ 49,000.00		
Special Projects Expense	\$ 4,666.67	5,045.00	
Taste of Temescal	\$ 20,086.30	0	
Temescal Street Fair	\$ 87,035.00	1,595.00	
Website, Logo, Walking Map, Dining & Shopping Guide	\$ 31,200.45	900.34	
Total 200 Mkting & Identity Enhancement	\$ 232,817.92	42,644.97	
300 Admin & Corp Operations			
BID Renewal (consultant firm 40k, Darlene 70k)	\$ 115,000.00	23,750.00	
BID Storage Container	\$ 2,110.77	2,079.32	
Food for Meetings	\$ 547.51	410.63	
Insurance	\$ 1,860.00	500	
Legal & Accounting	\$ 35,654.73	15,216.80	
Management contract (Admin) [New]	\$ 25,600.00		
Office			
Bank Charges	\$ 138.40	103.8	
copies	\$ 26.00	19.5	
Office Programs	\$ 5,243.63	4,128.24	
Parking/Travel	\$ 34.99	26.24	
Postage	\$ 84.76	63.57	

Printing	\$	211.85	364.51	
Supplies	\$	103.20	405.23	
Total Office	\$	5,842.83	\$5,111.09	
Other - Administrative Fees	\$	6.67	5	
Phone, Internet & Utilities	\$	1,336.19	1,174.71	
PR1 -Executive Director Fees	\$	64,075.91	55,907.28	
PR2- Admin Assistant	\$	2,521.29	3,320.28	
Professional Development	\$	103.73	77.8	
Professional Services	\$	3,015.00	3,165.00	
Rent	\$	17,594.73	16,166.05	
Worker's Compensation Insurance	\$	3,168.03	2,402.62	
Total 300 Admin & Corp Operations	\$	252,837.38	\$129,286.58	
Payroll Expenses				
Company Contributions				
Health Insurance	\$	2,805.47	1,604.10	
Total Company Contributions	\$	2,805.47	\$1,604.10	
Taxes	\$	1,344.21	0	
Wages	\$	17,280.92	0	
Total Payroll Expenses	\$	21,430.60	\$1,604.10	
Reimbursements	\$	3,000.00	5,981.29	
Total Expenses	\$	1,015,797.44	\$ 574,750.36	
Net Operating Income	\$	(198,214.95)	\$ 176,651.37	
Net Income	\$	(198,214.95)	\$ 176,651.37	
Remaining Funds from 2022	\$	122,349.08	\$ 122,349.08	
Reserve for 2024	\$	(75,865.87)	\$ 299,000.45	

Temescal Telegraph BID	
Income and Expense budget FY 2024	
	Projection TTL
Income	
5490 Miscellaneous revenue	\$ -
Projected Carry Over 2023	\$ 299,000.45
BID Assessments	\$ 723,582.49
Event Income	\$ 93,501.00
Interest Income	\$ 4,472.35
Special Projects Revenue	
Total Income	\$ 1,120,556.29
Gross Profit	\$ 1,120,556.29
Expenses	
100 PROWSO	
Cleaning/maintenance contract	\$ 266,000.00
Management contract (PROWSO) [New]	\$ 8,800.00
PR1 - Executive Director Fees	\$ 21,703.31
PR2 - Admin Assistant	\$ 12,480.00
PR4 - Operations Director	\$ 66,000.00
PROWSO Ped Lighting Debt Service	\$ 5,447.00
Security	\$ 11,283.15
Ped Lighting Principal	\$ 113,998.08
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Taste of Temescal	\$ 20,086.30
Temescal Street Fair	\$ 87,035.00
Website, Logo, Walking Map, Dining & Shopping Guide	\$ 31,200.45
Total 200 Mkting & Identity Enhancement	\$ 232,817.92
300 Admin & Corp Operations	
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Food for Meetings	\$ 547.51
Insurance	\$ 1,860.00
Legal & Accounting	\$ 35,654.73
Management contract (Admin) [New]	\$ 25,600.00
Office	\$ -
Bank Charges	\$ 138.40
copies	\$ 26.00
Office Programs	\$ 5,243.63
Parking/Travel	\$ 34.99

Postage	\$	84.76
Printing	\$	211.85
Supplies	\$	103.20
Total Office	\$	5,842.83
Other - Administrative Fees	\$	6.67
Phone, Internet & Utilities	\$	1,336.19
PR1 -Executive Director Fees	\$	64,075.91
PR2- Admin Assistant	\$	2,521.29
Professional Development	\$	103.73
Professional Services	\$	3,015.00
Rent	\$	17,594.73
Worker's Compensation Insurance	\$	3,168.03
Total 300 Admin & Corp Operations	\$	252,837.38
Payroll Expenses		
Company Contributions		
Health Insurance	\$	2,805.47
Total Company Contributions	\$	2,805.47
Taxes	\$	1,344.21
Wages	\$	17,280.92
Total Payroll Expenses	\$	21,430.60
Reimbursements	\$	3,000.00
Total Expenses	\$	1,015,797.44
Net Operating Income	\$	104,758.85
Net Income	\$	104,758.85
Remaining Funds from 2024	\$	104,758.85