

Friday, September 6, 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

Montclair Village Association

General Information & District Composition

Are you a Property-based BID or
Business-based BID?

Business-Based BID

Number of Full Time Equivalent 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	.25
Public Safety Officers/Security Ambassadors	.25
Hospitality/Business Outreach Ambassadors	.1
Other Seasonal/Part-time staff	.2
Volunteers (not counting your board members)	5

How many businesses in your BID? 220

Approximately how many residents in your BID? 1000

Approximately how many occupied storefronts in your district? 100

Approximately how many vacant storefronts in your district? 2

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

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	75
Number of bags of trash collected	110
Pounds of trash collected (if you measure trash in pounds not bags)	.0
Number of Incidents of illegal dumping removed	25
Number of 311 requests made	50
Number of hours of pressure washing	10
Number of stickers/posters removed	50

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

Daniel Swafford daniel@montclairvillage.com

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

2

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

12

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	300
Number of annual patrol hours dedicated by public safety officers/ safety ambassadors hired by the BID to public safety program in 2023	605
Number of merchant checks	400
Number of 911 calls made by the BID	10
Number of non-emergency calls made by the BID	40
Number of security cameras installed by or in coordination with the BID as of Dec. 31, 2023	62
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies in 2023	50
Number of incidents for which camera footage was provided to OPD/merchants/insurance companies prior to January 1, 2023 (if known)	300

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		

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

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 / 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 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	32
Number of tree wells maintained	80
Number of banners on street/light poles installed/maintained	49

	Number
Number of pedestrian-oriented lighting elements (including stand-alone light poles and lights on private buildings that illuminate the public right of way) installed	9
Number of Big Belly trashcans Installed and maintained	0
Number of public plazas installed/maintained	1
Number of public art pieces installed/maintained	42

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

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	3528	65	60295	3424
Facebook	3400	160	125000	3400
Instagram	2200	63	22700	5900
Twitter	0	0	0	0
Tiktok	0	0	0	0
WhatsApp	0	0	0	0
YouTube		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	6
Number of non-BID events in the District sponsored by BID or in-kind support provided by BID	10
Amount (\$\$) of Event sponsorship provided in 2023	5000
Number of attendees to events produced by or sponsored/supported by the BID (best estimate):	15000

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	400
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 (List at least three, and up to ten)

Accomplishment/New activity description
Produced the Montclair Beer, Wine & Music Festival in May welcoming 4000 Oaklanders to the Village and to raise funds for community events;
Supported a Trick-or-Treat event, supplying MVA branded bags and merchants with candy for a safe, fun outing Halloween weekend with pumpkin carving and a flash mob;
Produced the annual Holiday Stroll in the village that included live music in three venues, roaming entertainment, photos with Santa, family fun zone for children and over 40 participating merchants;
Farmer's Market - Supported a vibrant and active destination market every Sunday year-round, worked to foster health safety measures at the open air market;
Maintain rooftop outdoor class space at the Montclair Parking Garage for merchants to hold outdoor classes;
Held monthly board meetings open to merchants and public to comment, share updates, and ask questions;
Maintained and repaired rooftop lighting program encompassing 9 blocks of the district;

Accomplishment/New activity description

Continued the Montclair Village Shopping & Dining Guide to promote all businesses and ask the public to strengthen their Shop Local ~ Shop Montclair value commitment;

The Montclair Village Parking Garage continues with the ParkMobile app that allows visitors to pay using a smartphone. This program has paved the way for adoption at other City of Oakland garages and lots, MVA has provided guidance and advice to those other operators.

New program/activity description

Launch Reusables campaign for restaurants to use reusable to-go ware with support from Stop Waste and Oakland Recycles

Activating Antioch Court / The Village Plaza for Halloween Spooktacular to coincide with the weekly Farmer’s market featuring DJ, high school bands, MVA goody bags, vendors and merchant trick-or-treating;

Redesign the MVA website and calendar events

Advance Montclair Cares Club, giving individuals the opportunity to demonstrate their support by making a recurring annual donation, and engage in community volunteerism;

Install benches on Antioch Court Village Plaza for added seating during events and community;

Coordinate with OPD on setting up a substation in Montclair Village.

Hold quarterly meetings with the mayor and D4 leadership to better coordinate improvements for safety funding, economic development, infrastructure and blight in the business districts.

49 new street banners

Outdoor Movie Nights on a 50’ screen with free popcorn and a DJ in the parking lot of Red Oak Realty


New programs/activities planned for 2024 calendar year that the BID didn't do in 2023 (List at least three, and up to ten)

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:


Working Budget Montclair 2... .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)

20,216
see 2024 budget column

2025 Budget

Provide a line-item detailed budget of projected expenses and revenues for the next 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 2025 line-item detailed budget document here, as approved by your BID's Board of Directors:



For the 2025 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
120000	Fundraising Events
40000	Individual Charitable Contirbuions
10000	Grants

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

Yes

What is the proposed assessment increase for Calendar Year 2025?

5

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

98600

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

January 18, 2023 - Merchant email re meeting notice and agenda item announcement, agenda posting

Will the BID be proposing changes to the boundaries of the district, the basis and method of levying the assessment, and/or any changes in the classification of businesses for Calendar Year 2025?

No changes proposed

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
David Petlin	Business Owner/R ep	Flair Travel	President	Past

Name	Affiliation Type	Name of Affiliated Business/Org	Title	Status
Pat Benson	Business Owner/Rep	Mix Montclair	VP	Past
Darla Brezac	Property Owner/Rep	F&M Bank	Secretary	Current
Virginia Davis	Property Owner/Rep	Yellow Door Cafe	President	Current
Theresa Henrekin	Business Owner/Rep	Pelago	VP	Past
Mia Honoré	Business Owner/Rep	CRUfit	Director	Current
Sailesh Patel	Business Owner/Rep	Annie's Hallmark Shop	Director	Current
Sean Parkin	Business Owner/Rep	City Health	Director	Current
Tom Revelli	Business Owner/Rep	Montclair Sporting Goods	Treasurer	Current
Winter Williams	Business Owner/Rep	Winter Williams Presents	Director	Past
Marissa Betts	Property Owner/Rep	Ken Betts Company	Director	Current

MONTCLAIR VILLAGE ASSOCIATION						
WORKING BUDGET						
	<i>2023 Budget</i>	<i>2023 Actual</i>	<i>2024 Budget</i>	<i>2025 Budget</i>	<i>2023 Notes</i>	<i>2025 Notes</i>
Sources						
BID Assessments	\$ 92,830	\$ 106,369	\$ 93,700	\$ 98,600	Substantial Past-Due collection effort accounted for one time increase in disbursement	\$98,600 (2024 + 5% increase on assessments) less 3% for COO processing fees
Total Non-BID Sources of Funds	\$ 55,000	\$ 188,085	\$ 85,000	\$ 170,000		
Fundraising Events	\$ 25,000	\$ 120,859	\$ 55,000	\$ 120,000	Event total revenue; see expenses below	Event total revenue; see expenses below
Individual Charitable Contributions	\$ 20,000	\$ 52,526	\$ 20,000	\$ 40,000	A Mural project amounted to \$18K donations	A Mural project amounted to \$18K donations
Grants	\$ 10,000	\$ 14,700	\$ 10,000	\$ 10,000	City of Oakland Safety Infrastructure and Shop Safe grants	City of Oakland Safety Infrastructure and Shop Safe grants
Total Sources of Funds	\$ 147,830	\$ 294,454	\$ 178,700	\$ 268,600		
30% BID Assessments	\$ 27,849	\$ 31,910	\$ 28,110	\$ 29,580		
Non-BID Funds Allocated to PROW	\$ 9,000	\$ 44,496	\$ 10,000	\$ 50,000		Anticipating growing security demand
Total Economic Restructuring/PROW Income	\$ 36,849	\$ 76,406	\$ 38,110	\$ 79,580		
Project Management		\$ 5,000		\$ 5,000		
Area & Planter Maintenance	\$ 12,000	\$ 16,885	\$ 12,000	\$ 14,000	New Plants	
Security	\$ 19,000	\$ 44,346	\$ 20,500	\$ 55,000	Shop Safe + Holiday Security	
Security Camera Program	\$ 4,000	\$ 9,259	\$ 5,000	\$ 5,000	Safety Infrastructure Grant	
Public Improvement Design Services						
Equipment Rentals	\$ 1,000	\$ 916	\$ 1,000	\$ 1,000		
Total Economic Restructuring/PROW Expenses	\$ 36,000	\$ 76,406	\$ 38,500	\$ 80,000		
Economic Restructuring/PROW Income - Expenses	\$ 849	\$ -	\$ (390)	\$ (420)		
40% BID Assessments	\$ 37,132	\$ 42,547	\$ 37,480	\$ 39,440		
Non-BID Funds Allocated to District Identity	\$ 37,000	\$ 113,885	\$ 55,000	\$ 100,000		
Total Promotions and Design (District Identity) Income	\$ 74,132	\$ 156,432	\$ 92,480	\$ 139,440		
Project Management/PR	\$ 20,000	\$ 38,000	\$ 21,000	\$ 35,000		
Pedestrian Lighting/ Holiday Décor	\$ 18,000	\$ 19,970	\$ 18,000	\$ 18,000		
Events and Event Marketing						
Restaurant Walk	\$ 3,500	\$ 7,189	\$ 4,500	\$ 4,500	Revenue neutral or positive	Revenue neutral or positive
Art Walk	\$ 500	\$ 500	\$ 500	\$ 500	Revenue neutral or positive	Revenue neutral or positive
Beer, Wine and Music Festival	\$ 18,000	\$ 53,114	\$ 18,000	\$ 50,000	Revenue neutral or positive	Revenue neutral or positive
Montclair Outdoor Movie Nights	\$ 500	\$ 388	\$ 500	\$ 500	returning in 2023	returning in 2023
Farmer's Market	\$ 500	\$ 500	\$ 500	\$ 500		
Halloween - Trick-or-Treat	\$ 500	\$ 500	\$ 500	\$ 500		
Holiday Stroll	\$ 4,000	\$ 16,322	\$ 5,000	\$ 15,000		
Advertising & Design Services - Ads, Website	\$ 3,000	\$ 3,000	\$ 4,000	\$ 4,000		
Social Media Marketing (inc above)						

	2023 Budget	2023 Actual	2024 Budget	2025 Budget	2023 Notes	2025 Notes
Marketing Booth Fees/Staffing/ Merchant Mixers		\$ 3,609	\$ 5,000	\$ 6,000	Non Assement Funds [Cares Club]	Non Assement Funds [Cares Club]
Public Art		\$ 12,000		\$ 3,000	Non Assement Funds [Individual Contributions]	
Banners	\$ 5,500	\$ 1,340	\$ 15,000	\$ 1,000	new banners expensed in 2024	
Total Promotions and Design (District Identity) Expenses	\$ 74,000	\$ 156,432	\$ 92,500	\$ 138,500		
Promotions and Design (District Identity) Income - Expenses	\$ 132	\$ -	\$ (20)	\$ 940		
30% BID Assessments	\$ 27,849	\$ 31,910	\$ 28,110	\$ 29,580		
Non-BID Funds Allocated to Organization/Administration	\$ 10,000	\$ 9,490	\$ 10,000	\$ 20,000		
Total Organization/Administration Income	\$ 37,849	\$ 41,400	\$ 38,110	\$ 49,580		
District Management/Assistants	\$ 28,250	\$ 28,640	\$ 28,400	\$ 34,000		
Office Rent & Storage	\$ 5,096	\$ 6,888	\$ 6,888	\$ 6,888	2023 rent increase	
Office Supplies	\$ 300	\$ 764	\$ 300	\$ 800		
Bank Fees Minus Interest	\$ -	\$ 134	\$ 200	\$ 250		
Postage/Box Rental	\$ 200	\$ 200	\$ 200	\$ 200		
Accounting/Filing Fees/Licenses	\$ 1,200	\$ 1,446	\$ 1,200	\$ 1,500		
Meeting Supplies Expenses	\$ 300	\$ 299	\$ 300	\$ 300		
Insurance	\$ 1,255	\$ 1,843	\$ 1,255	\$ 2,000	Add'l event insurance	Add'l event insurance
Dues/Subscriptions/Memberships		\$ 46	\$ 50	\$ 50	Oakland Chamber	Oakland Chamber
Utilities/Phone/Internet Service	\$ 1,050	\$ 570	\$ 1,050	\$ 1,050		
Computer/Software - Upgrades	\$ 200	\$ 570	\$ 300	\$ 3,000		Web Site Rebuild
Total Organization/Administration Expenses	\$ 37,851	\$ 41,400	\$ 40,143	\$ 50,038		
Organization/Administration Income - Expenses	\$ (2)	\$ 0	\$ (2,033)	\$ (458)		
Total Income	\$ 147,830	\$ 294,454	\$ 178,700	\$ 268,600		
Total Expenses	\$ (147,851)	\$ (274,238)	\$ (171,143)	\$ (268,538)		
Carryforward/Reserve	\$ -		\$ 20,216	\$ 27,773		
Net	\$ (21)	\$ 20,216	\$ 27,773	\$ 27,835		