

**BID ANNUAL REPORT**  
**ROCKRIDGE DISTRICT ASSOCIATION, 2023**  
**OAKLAND, CALIFORNIA**

**1. Any proposed changes in the boundaries of the BIMD or in any benefits zones within the district:**

*There are no proposed changes to the boundaries of the Business Improvement Management District.*

**2. Improvements and activities provided in the past calendar year to 2022:**

The Rockridge District Association continued to organize our work around two principal poles of action: 1) the promotion and 2) the preservation & improvement of our business district.

**THE PROMOTION OF THE ROCKRIDGE BID COMMUNITY AS A DESTINATION:**

In 2022 we focused on placemaking and business attraction initiatives, a persistent need as our merchants recover from covid impacts. We erected new, vibrant street banners along College Avenue that promote dining, shopping, and personal services found in the district. We published and distributed a print and digital photo-magazine promoting the businesses in the district. This publication was also shared with local realtors, AirBNBs, hoteliers, visitors' bureaus, and other interested partners. We developed a strategic partnership with BART to promote the businesses in the district. This included a major promotion during the holiday season where the Bay Area BART ridership and social media audience were encouraged to shop, dine, and explore Rockridge with an opportunity to win thousands of dollars in Rockridge gift cards.

Though we have a limited budget for event production, we have created an ongoing monthly series called Rockridge Rock-N-Stroll that showcases live music, sales, pop-up vendors, tastings, kids' crafts, and other thematic features like a scavenger hunt and pup promenade, as examples. This series spans the full length of College Avenue, includes all merchants interested in participating, and successfully draws from a Bay Area-wide audience. Merchants have repeatedly given us feedback that they see increased sales during these events.

We also invested significant time and resources into programming and promoting Rockridge's annual Halloween Parade which is produced in partnership with the Rockridge Community Planning Council and the Oakland Library Rockridge Branch. In 2022, we saw hundreds of families attending, a significant increase from past years. We believe the Halloween Parade — bolstered by our family-friendly and walkable district — will be a major Bay Area Halloween attraction in the coming years.

Throughout the year, the Rockridge District Association maintained an ongoing social media, paid advertising, and earned media program in order to promote our district and spotlight

individual merchants. By relying on in-house solutions for marketing, design, and event production, we were able to create themed shopping guides, street banners, advertising campaigns, and other campaigns at marginal costs to the organization.

## **THE PRESERVATION & IMPROVEMENT OF THE ROCKRIDGE BID RESOURCES AND COMMUNITY: STREETScape AND SECURITY**

The Rockridge District Association continues to provide the highest quality of service and support to our merchant and professional community as well as a vital link to property owners, on one of the smallest budgets city-wide due to our retail-based assessment structure.

We have a robust graffiti removal program which includes maintaining city street light poles and other fixtures. To help make the district more pleasant we engage a subcontractor to power wash the city trash containers, this includes the cage and the liner, which is sanitized. This helps to eliminate the odor of decaying remains left behind after emptying. Our subcontracted street cleaning team goes well beyond providing basic service for the district. We continue to take on the task of trimming trees where possible and when budget allows, we hope to be able to do more extensive and thorough maintenance as well as planting and replacing of dead and dying trees.

Our dedication goes well beyond the district boundary. We serve as a vital link to our council member, The Oakland Police Department, fire/ medical, Oak 311, and the MACRO team as well as other social outreach programs. In terms of security our BID staff is on the front-line dealing daily with issues from shoplifting to unhoused encampments in collaboration with the Oakland Police Department. Our staff is the public face of security and safety in our BID district. Chris Jackson is often one of the first calls made when merchants are looking for direct help and assistance in dealing with the different city departments relevant to such issues.

In 2023 we had a merchant breakfast attended by more than 50 people at which we trained merchants on the resources available to them in terms of security ranging from OPD to MACRO. We also created and passed out informational sheets for each merchant including relevant contact information for help within the city, OPD and the Oakland Fire Department. We also purchased and gave out security whistles to merchants to distribute among their staff for safety as they walk to their cars after work shifts. We have worked hard to create a community-wide sense of collaboration, communication and solidarity in regards to safety issues. This work crosses many areas of our budget planning and is summed up in staff time and investment.

We partner with the Rockridge Community Planning Council and Rockridge Neighborhood Crime Prevention Council along with the College Avenue Presbyterian Church to help better our community. Some of these streetscape improvements include the beautification of trash containers along the avenue, maintaining the decomposed granite in the tree wells, pruning

and caring for the various trees along the avenue, and weekly street cleaning, graffiti removal and beautification of our public spaces. These activities are all paid for out of our BID income and in partnering relationships.

We work closely with BART to help maintain the plaza as this is such a focal point in the heart of our district. We have an excellent relationship with their contractor who was doing an outstanding job maintaining their property.

We'll be proud once again this year to bring our holiday lighting program back. For those of you who are not familiar with this, it was no small feat or without great expense. We worked with the city staff and PG and E for over two years to gain a permit to add lighted holiday decorations to each streetlight pole here in the boundary of the district where possible.

Our partnership with BART has allowed us to light the redwood tree on the southeast corner of the plaza not only adding cheer to the district but beckoning folks as they pass on Highway 24 to explore the district.

The Rockridge Business District Association continues to strive to make College Ave one of the most inviting and vibrant shopping districts our city has to offer by focusing on both promotion and preservation. We see the success of that efforts in an article published in [September's Rockridge News](#) that validates our efforts.

*“College Avenue Retail is HOT!*

*According to John Cumbelich & Associates of Walnut Creek, Rockridge has proven to be Oakland’s hottest retail district with occupancy rates moving from 96.10 percent to 97.32 percent, and this includes new leases signed with three shops soon to be open on College Avenue, including Bad Walter’s Boot - leg Ice Cream, Love + Chocolate, and The Xocolate Bar.”*

### **3. The improvements and activities to be provided for the current calendar year - 2023:**

#### **THE PROMOTION OF THE ROCKRIDGE BID COMMUNITY AS A DESTINATION:**

The Rockridge District Association is building upon all of the marketing initiatives from 2022 for this year and future years. [The monthly Rock-N-Stroll series](#) was renewed for 2023 and now includes more themes. For instance, this July, the event was themed “Art Bizarre” and featured 24 Rockridge-area artists showcasing their works outside of businesses along College Avenue.

The team planning the annual Halloween Parade has started planning two months earlier than in 2022, and are preparing a significant increase in families attending this year. We are activating two outdoor zones for family-friendly activities, storytelling, singalongs, and Halloween music. We expect to have over 50 businesses participating in passing out candy, offering sales, and hosting activities for kids.

We have deepened our relationship with local media outlets which has secured monthly advertorials featured in the *Rockridge News*, coverage of our events in local outlets such as Bay Area News Group, East Bay Express, and Oaklandside. And Bay Area blogs and calendar listings now regularly feature our events.

We continue to invest in advertising the district in local media outlets and on social media. We have nearly doubled the amount of social media posts promoting our merchants in 2023 and our number of followers continues to grow. We plan to again produce [the annual Rockridge Guide](#), which is in print and digital format, and distribute to locals, new residents, and visitors. This beautiful photo-exhibit of our merchants is an effective showcase of the unique products, services, and experiences you can find in Rockridge.

#### **THE PRESERVATION & IMPROVEMENT OF THE ROCKRIDGE BID RESOURCES AND COMMUNITY:**

In 2023 we continue in our effort to preserve and improve our business district in particular in the light of increased crime, substantial car-break-ins along the avenue, problems related to unhoused visitors and graffiti. We continue with our programs of graffiti removal, street cleaning, cleaning our trash bins, garden/vegetation maintenance, and empowering district merchants in the face of increased crime with trainings, community meetings, and liaising with OPD and MACRO.

In February of 2023, the Rockridge District Association performed an extensive audit to identify businesses that, despite operating a for-profit business within our district's footprint, were not getting Assessed their annual RBID fees by the City of Oakland. Our audit identified 92 probable cases — with a belief that there are far more — and have been working with various departments at the City of Oakland to explore why they were missed. Reasons identified have included the business not having a current business license, HdL database limitations and errors, and confusion on who qualifies for annual RBID Assessments. We believe these systematic problems have resulted in missed annual Assessments that have cost our district tens of thousands of dollars. As of August, we have developed a new plan, in partnership with the City of Oakland, to improve processes and to assist the City in capturing more qualifying businesses moving forward. This should result in increasing our revenue, if not this calendar year, then in future fiscal cycles. We plan to continue to work with the City of Oakland to help them with identifying and contacting businesses that are out of compliance and/or delinquent. In October, we expect to receive a status report on efforts to collect from RBID Assessment delinquencies.

#### **4. Estimated costs for providing the improvement and services in the upcoming calendar year 2024:**

*(see attached budget).*

<b>Projected Budget 2024 Rockridge BID</b>		
<b>Income</b>		161,000
<b>Expenses</b>		
Total Marketing & Promotion Committee	42,150.00	26%
Total Organization Committee	78,124.98	24%
Total Streetscape & Security Committe	35,938	47%
Uncategorized Expense	0	0%
Total Expenses	\$156,212.98	97%
<b>OPERATING INCOME</b>	161,000	
<b>NET INCOME</b>	\$4,787.02	3%
		100%

We allocate administrative staff salaries towards the different categories in amounts that represent the amount of time that they spend supervising and administering those different programs.

## **5. Method and basis for levying the assessment:**

*A) Assessments are based on business revenue of our merchants in the District.*

For the FY 2024-2025 assessment, a sub-classification of businesses that earn annual gross receipts of \$25,000 or less will be maintained. They will have a reduced fee for that assessment year of \$60 (instead of \$120). Such sub-classification begun as a temporary solution to reduce the number and expense of processing hardship partial fee waiver requests. This identical sub-classification and reduced assessment was first permitted in FY 2004-2005 and has now become permanent.

*B) We are NOT requesting an Assessment increase for the upcoming fiscal year.*

Rather, we will continue working with City of Oakland staff to improve processes and to assist the City in receiving assessments from more qualifying businesses moving forward. This should result in increasing our revenue.

## **6. Surplus or Deficit for the upcoming calendar year – 2024: to be carried over from previous calendar year.**

If we have any surplus at the end of the year, it will be carried over as a reserve. As in the past years, because of the business-based structure of our BID we don't usually have any sort of surplus – using all the revenue we are given to do the most of our identified priorities.

**7. The amount of any contribution to be made from sources other than BID/CBD assessments to be levied.**

We are projecting to receive \$2,000 in other sources, including grants, and event sponsorships.

This revenue will be folded into the budget to pay for or to empower us to do specific things beyond our budgetary limits.

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Report compiled by Rev. Monte McClain, RDA President, along with help from our BID staff members.

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*Attachments:*

*Budgetary projections on income and potential expenses for 2023-24*

# Rockridge District Association

Profit and Loss

January - December 2022

2022 Budget

	TOTAL	%	
Income			
<b>Total BID Revenues</b>	<b>243,896.31</b>		240,000
<b>Total Income</b>	<b>\$243,896.31</b>		240,000
GROSS PROFIT	<b>\$243,896.31</b>		
<b>Expenses</b>			
Bank service charges	1,462.64		1500
Marketing & Promotion Committee	8,722.07		10,000
Advertising & Graphics			15,000
Advertising/Promotional	247.95		1,000
Events	3,044.98		5,000
Marketing & Materials	1,393.40		2,000
Rock n Stroll	31,245.40		35,000
Web Design & Communication	25,497.30		25,000
<b>Total Marketing &amp; Promotion Committee</b>	<b>70,151.10</b>	26%	59500
Organization Committee	3,960.00		4,000
Accounting & Legal			5,000
Administrative	6,000.00		3,500
Insurance	3,579.00		500
Office Expense	338.50		1,000
Postage, Copy & Printing Professional	571.98		500
Insurance-Prof Admin	358		1,500
Payroll Service Fees-Prof Admin	1,317.31		5,000
Payroll Tax Expense	4,464.05		55,000
Wages-Prof Admin	54,967.96		1,000
Workers Comp-Prof Admin	823.00		
<b>Total Professional Administration</b>	<b>61,930.32</b>		
<b>Total Organization Committee</b>	<b>76,379.80</b>	30%	77,000
Streetscape & Security Committee	104,184.00		100,000
Beautification-Streetscape Misc			
<b>Total Streetscape &amp; Security Committee</b>	<b>104,184.00</b>	40%	10,000
Uncategorized Expense	10,018.06	4%	
<b>Total Expenses</b>	<b>\$262,195.60</b>	100%	<b>246,500</b>
NET OPERATING INCOME	<b>-\$18,299.29</b>		
NET INCOME	<b>-\$18,299.29</b>		

# Rockridge District Association

2023 Budget

Profit and Loss, March-September, 2023

	2023 BUDGET	MAR-SEP, 2023	TOTAL %
Income			
<b>Total BID Revenues</b>	160,000	180,523.90	
Additional Revenue	10,000		
<b>Total Income</b>	<b>170,000</b>	180,523.90	
GROSS PROFIT	170,000	180,523.90	
Expenses		867.14	
Bank Service Charges	1,500		
Marketing & Promotion	6,000	1,136.46	
Advertising/Promotional	250		
Events	1500	976.9	
Marketing & Materials	1000		
Rock n Stroll	16,000	5,750.00	
Web Design & Communication	19,000	14,040.67	
<b>Total Marketing &amp; Promotion</b>	<b>45,250</b>	21,904.03	19%
Organization Committee	3,960	2,385.00	
Administrative	6,000	3,500.00	
Insurance	3,579	830.22	
Office Expense	350	22.00	
Postage, Copy & Printing	600	925.77	
Professional Administration	400	1,011.53	
Payroll Tax Expense	1300	3,711.27	
Wages-Prof Admin	59,000	48,513.38	
Workers Comp-Prof Admin	1,600	455.00	
<b>Total Professional Administration</b>		53,691.18	
<b>Total Organization Committee</b>	<b>76,789.00</b>	61,354.17	53%
Streetscape & Security Committe	40,000	29,131.26	
<b>Total Streetscape &amp; Security</b>	<b>40,000</b>	29,131.26	25%
Uncategorized Expense	5,000	3,695.38	3%
<b>Total Expenses</b>	<b>167,039</b>	\$116,951.98	
NET OPERATING INCOME	170,000	\$63,571.92	100%
NET INCOME	2,961	\$63,571.92	



## Budget 2024 Rockridge BID

### Income

BID Revenue	159,000		
Adittional Revenue	2,000		
<b>Total Income</b>	<b>161,000</b>		

### Expenses

Bank service charges	1,400.00		
Marketing & Promotion Committee Advertising & C	6,000.00		
Adve rtising/Promotional	250		
Events	1,500.00		
Marketing & Materials	1,000.00		
Rock n Stroll	13,000.00		
Web Design & Communication	19,000.00		
<b>Total Marketing &amp; Promotion Committee</b>	<b>42,150.00</b>	<b>42,150.00</b>	26%
Organization Committee Accounting & Legal	3,960.00		
Administrative	6,000.00		
Insurance	3,579 .00		
Office Expense	335		
Postage, Copy & Printing Professional Administrati	571.98		
Insurance-Prof Admin	358.00		
Payroll Service Fees-Prof Admin	1,300.00		
Payroll Tax Expense	1,000.00		
Wages-Prof Admin	24,000.00		
Workers Comp-Prof Admin	1600		
<b>Total Organization Committee</b>	<b>39,124.98</b>	<b>39,124.98</b>	24.00%
Streetscape & Security Committe Beautification-Sti	35,938		
Wages-Prof Admin	35,000		
Payroll Tax Expense	4,000		
<b>Total Streetscape &amp; Security Committe</b>	<b>74,938</b>	<b>74,938</b>	47%
Uncategorized Expense	0		
<b>Total Miscellaneous</b>	<b>0</b>		
<b>Total Expenses</b>	<b>-\$156,212.98</b>	156,212.98	
<b>OPERATING INCOME</b>	<b>161,000</b>		3%
<b>NET INCOME</b>	<b>\$4,787.02</b>		100%



RDA Meeting Minutes  
Thursday, 10-19-2023

Members Present: Veronica Bhonsle, Monte McClain, Robert Pennell, Katy Winter, Matt Zimbalist

Members Absent:

Staff Present: Jody Colley, Chris Jackson

Monte began the meeting 8:32 am, noting a Quorum.

- I. The directors approved the meeting's Agenda by consent.
- II. The directors approved the meeting's Minutes by consent.

III. Chair's report

a. Updates from our President — Monte

b. We are required to provide an Annual BID Report, including a projected future budget and current YTD financials that align with the percentages of our "buckets" first identified in our Management Plan.

c. Actions

- We approved the budget presented for 2024
  - o Robin (M) Veronica (S) – unanimous approval
- The board approved the decision to move our financial year to a January to December schedule.
  - o Veronica (M) Matt (S)– unanimous approval – fiscal reporting
- Our Treasury Committee will meet to advance on work around a new book-keeping system and accountant following the move of the Henry Levy Group to Solano Avenue.
- By consensus the board approved our official RDA signing of the traffic solution proposal from neighbor Rep. Buffy Wicks in view of partnering with our larger community around shared issues
  - o Katy has some comments/ideas to share. She'll communicate them to Buffy. Monte will connect them.

IV. Treasurer's Report

- Robin shared a brief snapshot of our financial situation. We're in good shape.

V. Streetscape and Security

- a. Trees & tree wells —
  - a. Decomposed Granite in the tree wells is almost fully installed.

- b. Security/safety/unsheltered updates — Chris
  - a. Car-jacking in the 300 block of College on 10-18-23
  - b. Auto-burglaries are continuing to happen.
  - c. We short on officers, insufficient for the city.
  - d. Someone is stealing the steel liners of the garbage cans.

## VI. Marketing and Promotions

- a. Rock-N-Stroll October event — Jody  
Last even of 2023. Jody is going to send out a survey to merchants to help ascertain about next steps and format for 2024.
- b. Halloween Parade – Sunday, 10/29. Looking good in terms of the programming. We have less of a marketing budget to get the word out. RCPC is helping to contact the schools, etc.
- c. Jody applied for a grant for marketing with the city of Oakland. We are not in a priority zone as identified by the city council. And we have some good stories to tell about how our events impact our merchants. Our events are specifically for our merchants.
- d. The city is going to roll out a holiday campaign. Info to come out on 10/19/24.

## VII. Land Use

- a. New business in the district include:
  - Knitting store to open
  - Nail salon
- b. Exiting businesses:
  - The Golden Squirrel has closed down in order to rebuild with a new concept.
  - Berkeley Kids room is leaving.
  - Hair Salon Pony – is leaving.
- c. Our occupancy rate has dropped from 97 to 94% (in the report from 10-18-23).

## VIII. Old Business

### Annual Assessments status report — Jody

- Jody has helped 20 businesses to pay. Helping to clear up un-paid invoices and merchants who have never been assessed.
- Jody has in inquiry out of the city about Bank of America (if they've ever been billed). As a bank they don't pay city of Oakland taxes. So they might not receive a statement on an annual basis. She's working with the city, and then contacting the bank directly. To look at missed invoices.
- The city of Oakland is providing the best information in terms of clarity and quantity that they ever have.

## IX. New Business

By consensus we agreed that we'd send out the email announcement about Dining for Justice to our merchants (some of whom already participate).

## IX. Public Comment

There was no public comment.

X. Monte adjourned the meeting at 9:20am.

## Minutes taken by Monte McClain

BROWN ACT: Government Code 54950 (The Brown Act) requires that a brief description of each item to be transacted or discussed be posted at least 72-hours prior to a regular meeting. The RDA posts Agendas at 5951 College Avenue, Oakland, CA 94618. Action may not be taken on items not posted on the agenda. Meeting facilities are accessible to persons with disabilities. If you require special assistance to participate in the meeting, notify Chris Jackson at 510-604-3125 at least 48 hours prior to the meeting.