



The MVA's mission is to support our merchant members and help the Village thrive.

## Montclair Village Association Business Improvement District

Annual Report 2023

Oakland, California



# **Annual Report to the Oakland City Council Relating to the 2023 Montclair BID**

Pursuant to California Streets and Highways Code Part 6  
Parking and Business Improvement Area Law of 1989  
Chapter 4, Section 36533

## **1. Proposed changes in boundaries of the parking and business improvement area or in any other benefit zones within the area.**

There are no proposed changes in the boundaries of the parking and business improvement area or any benefit zones in the area.

## **2. Improvements and activities provided [2022] - Budget Attached**

### **Beautification/Design/Land Use [Economic Restructuring]**

- Maintained rooftop outdoor class space at the Montclair Parking Garage for merchants to hold outdoor classes, no space use fee
- Direct infrastructure and permitting assistance for businesses to utilize Oakland's Flex Street initiative to activate safe outdoor spaces for dining and retail
- Maintained Village planters (32), tree wells (80), and median plantings
- Provided weekly sidewalk and gutter sweeping; 5–20 lbs. of litter removal per week
- Worked with City of Oakland Parking Department to advise their transition to a variable rate on street parking program
- Provided sidewalk steam cleaning of 10 city blocks and cleaning of 20 City trash receptacles
- Continues to obtain City and public utility support to address potholes, graffiti, infrastructure, damage, signage and recycling issues in the Village
- Earth Day 2022 — Community Work Day – Assisted Montclair Neighborhood Council and Friend of Montclair Park on park cleanup and held a service appreciation BBQ
- Murals and new art additions to the streetscape
- Progressed the Antioch Court safety improvement project to break ground in April, 2022; infrastructure components of the project completed in September 2022
- Launched Montclair Carers Club for future events and programmed activities
- Maintained and repaired the rooftop lighting program encompassing 9 blocks of the district; Creating an illuminated aesthetic and adding to the safety of the district at night
- Held monthly meetings where merchant members and members of the public could comment, share updates, and ask questions
- Held annual meeting (via Zoom) to honor incoming and departing Board Members
- Board participation and merchant participation in committees and working groups
- Continued the Associate Membership program to represent area businesses, enabling businesses neighboring the BID or in home offices to become involved in the Association and benefit from the collective marketing effort
- Maintained/updated database of Village merchants, property owners/managers
- Worked closely with the Oakland Tax Division to collect assessments from severely delinquent BID

members

- Involved six (6) high school and college interns to learn about community organizing and business support
- Farmer's Market — Supported a vibrant and active destination market, worked to foster health safety measures at the open air market
- Worked with City of Oakland and Oakland City Council to evaluate and enhance Flexible Parking Pilot (start date 8/18/2014) and Parking Assessment district; new signage installed in Q2 2022

### **Promotions [Promotions & Design Committees]**

- Continued to promote County health and safety guidelines and encourage COVID-19 best practices among merchants and patrons
- Maintained OPEN For Business directory to inform the public of business activity — highlighting pick-up and delivery services, and amended hours, continue to maintain and promote the full Montclair merchant directory
- Managed weekly Farmers' Market activities, assisting with cleanliness and presentation of the market
- Website — Front facing promotion of businesses
- Produced the Montclair Beer, Wine & Music Festival (June 18) to raise approximately \$10,000 for community events
- Supported a Trick-or-Treat event on Halloween Weekend, supplying children with MVA-branded bags and merchants with candy to share
- Produced Holiday Stroll in the village that included live music in three venues, roaming entertainment, photos with Santa, a family fun zone for children, and more than 40 participating merchants
- Grow the new MVA website and calendar function to include area events
- Produced Montclair Village electronic newsletter
- Initiated a district marketing campaign for business promotion and to highlight the assets of the District
- District Marketing Campaign — Continued the Montclair Village Shopping & Dining Guide to promote all businesses and ask the public to strengthen their Shop Local ~ Shop Montclair value commitment
- Launched Montclair Cares Club, giving individuals the opportunity to demonstrate their support of the community by making a recurring annual donation
- Ribbon cutting event (September 24) brought together donors, supporters, and the community at-large to celebrate Antioch Court's transformation from a sharp blind corner to an open outdoor space
- A new roadway, sidewalks, decorative and functional lighting, and safety features were constructed and installed to create the Montclair Village Plaza
- The Montclair Village Parking Garage continues with the ParkMobile app that allows visitors to pay using a smartphone, this pilot 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

### **Safety/Security [Economic Restructuring]**

- Assured security contract has responsive coverage and improved connectivity with surrounding residential areas
- Installed a new high-definition camera system that covers three intersections in the district and incorporates LPR (License Plate Recognition) technology
- Maintained existing system of security cameras at the parking garage and at key locations in the district
- Implemented an LED upgrade to the Montclair Parking Garage for Q1 2022 installation was finalized, improving the safety of the facility along with significant energy savings
- Partnered with OPD walking officer and merchant watch to educate merchants and utilize

CEPTD tactics for crime deterrence

- Partnered with Montclair Neighborhood Council (MNC) (beat 13Z NCPC) to address district issues
- Obtained \$10,000 in funding from the City of Oakland to provide a professional and visible security presence in the commercial district for an inviting and safe holiday shopping season. Accomplishments 2022 (Section II)

### **3. Improvements and activities to be provided in the upcoming year [2023] - Budget Attached**

#### **Beautification/Design/Land Use [Economic Restructuring]**

- Maintain rooftop outdoor class space at the Montclair Parking Garage for merchants to hold outdoor classes
- Direct infrastructure and permitting assistance for businesses to utilize Oakland's Flex Street initiative to activate safe outdoor spaces for dining and retail, assist with new parklet design guidelines
- Maintain Village planters (32), tree wells (80), and median plantings
- Provide weekly sidewalk and gutter sweeping; approx. 5–20 lbs. of litter removal per week
- Work with City of Oakland Parking Department to advise their implementation of the variable rate on street parking program
- Provide sidewalk steam cleaning of 10 city blocks and cleaning of 20 City trash receptacles
- Continue to obtain City and public utility support to address potholes, graffiti, infrastructure, damage, signage and recycling issues in the Village
- Earth Day 2023 — Community Work Day – Assisted Montclair Neighborhood Council and Friend of Montclair Park on park cleanup
- Murals and new art additions to the streetscape - help artists fundraise for public art installations
- Finalize the Antioch Court safety improvement project open infrastructure components of the project
- Advance Montclair Carers Club for future events and programmed activities
- Maintain and repair the rooftop lighting program encompassing 9 blocks of the district; Creating an illuminated aesthetic and adding to the safety of the district at night
- Hold monthly meetings where merchant members and members of the public could comment, share updates, and ask questions
- Hold annual meeting (via Zoom) to honor incoming and departing Board Members
- Board participation and merchant participation in committees and working groups
- Continue the Associate Membership program to represent area businesses, enabling businesses neighboring the BID or in home offices to become involved in the Association and benefit from the collective marketing effort
- Maintain/update database of Village merchants, property owners/managers
- Work closely with the Oakland Tax Division to collect assessments from severely delinquent BID members
- Involve high school and college interns to learn about community organizing and business support
- Farmer's Market — Support a vibrant and active destination market, worked to foster health safety measures at the open air market
- Work with City of Oakland and Oakland City Council to evaluate and enhance Flexible Parking Pilot (start date 8/18/2014) and Parking Assessment district

## **Promotions [Promotions & Design Committees]**

- Promote County health and safety guidelines and encourage COVID-19 best practices among merchants and patrons
- Maintain OPEN For Business directory to inform the public of business activity — highlighting pick-up and delivery services, and amended hours, continue to maintain and promote the full Montclair merchant directory
- Manage weekly Farmers' Market activities, assisting with cleanliness and presentation of the market
- Website — Front facing promotion of businesses
- Produce the Montclair Beer, Wine & Music Festival to raise approximately funds for community events
- Support a Trick-or-Treat event on Halloween Weekend, supplying children with MVA-branded bags and merchants with candy to share
- Produce the Annual Holiday Stroll in the village that included live music in three venues, roaming entertainment, photos with Santa, a family fun zone for children, and more than 40 participating merchants
- Grow the new MVA website and calendar function to include area events
- Produce Montclair Village electronic newsletter
- Initiate a district marketing campaign for business promotion and to highlight the assets of the District Marketing Campaign — Continued the Montclair Village Shopping & Dining Guide to promote all businesses and ask the public to strengthen their Shop Local ~ Shop Montclair value commitment
- Enhance Montclair Cares Club, giving individuals the opportunity to demonstrate their support of the community by making a recurring annual donation, and engage in community volunteerism
- Maintain new roadway, sidewalks, decorative and functional lighting, and safety features that were constructed and installed to create the Montclair Village Plaza
- The Montclair Village Parking Garage continues with the ParkMobile app that allows visitors to pay using a smartphone, this pilot 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

## **Safety/Security [Economic Restructuring]**

- Assure security contract has responsive coverage and improved connectivity with surrounding residential areas
  - Add a new high-definition camera system at the intersection of Medau Pl. and Morage Ave. and incorporates LPR (License Plate Recognition) technology
  - Maintain existing system of security cameras at the parking garage and at key locations in the district
  - Maintain an LED upgrade to the Montclair Parking Garage
  - Partner with OPD walking officer and merchant watch to educate merchants and utilize CEPTD tactics for crime deterrence
  - Partner with Montclair Neighborhood Council (MNC) (beat 13Z NCPC) to address district issues
- 4. Estimate of the cost of providing the improvements and activities for upcoming fiscal year.**  
See attached budget
  - 5. Method and basis of levying the assessment.**  
The method and basis of levying the assessment has not changed from the adoption of the original

ordinance; however, the Montclair Village Association (MVA) Board is recommending a 5% increase across all categories beginning January 1, 2024 (unanimously approved at the January 18, 2023, MVA Board meeting). Increases to the assessment of up to 5% per year are allowable per the “Annual Assessment Adjustments” section (page 7) of the “Final Management District Plan For Montclair Business Improvement District” dated August 1, 2001 as follows:

“Since Montclair Village is, for all intents and purposes, built out, there will probably not be any significant commercial expansion in the village, Therefore, the only way to have the district keep up with the cost of inflation is to make such a provision with the plan. Only the Management Corporation Board of Directors shall have the option to exercise and recommend an increase in assessments annually, not to exceed 5% of the previous year’s assessments.”

Extra funds are necessary to keep up with rising costs and inflation; costs of expenses, paid labor and contracted work have increased. The funds will be used to pay market rate contractors. Therefore the Montclair Village Association (MVA) Board has approved a 5% increase across all categories beginning January 1, 2024. Please refer to the updated Assessment Table dated 2024 for rates (attached).

Budget categories below reflect the original terminology of the Montclair Business Improvement District Final Management District Plan Exhibit C to read: Economic Restructuring, Promotions & Design Committees, Organization/Administration Committee

**6. Surplus or Deficit for 2023 to be carried over from previous calendar year**

There is no projected carryover.

See attached budget.

**7. The amount of any contributions to be made from sources other than assessments levied.**

Other than assessments levied, funds will be generated from fundraiser events, Pacific Fine Arts Festivals, and from management of the Montclair Village Parking Garage, fundraiser events like the Montclair Beer, Wine & Music festival, and funds from the Associate Member program, started in mid-2010, and are estimated to be approximately \$55,000

David Petlin

President, Montclair Village Association



**MONTCLAIR VILLAGE ASSOCIATION**  
WORKING BUDGET

	2022 Budget	2022 Actual	2023 Budget	2024 Budget	Notes
<b>Sources</b>					
<b>BID Assessments</b>	\$ 88,830	\$ 88,830	\$ 92,830	\$ 93,700	\$96,600 (2022 + 5% increase on assessments) less 3% for COO processing fees
<b>Total Non-BID Sources of Funds</b>	\$ 185,000	\$ 205,000	\$ 55,000	\$ 55,000	
Fundraising Events	\$ 163,000	\$ 183,000	\$ 25,000	\$ 25,000	
Individual Charitable Contributions / Associate Member Fees	\$ 12,000	\$ 12,000	\$ 20,000	\$ 20,000	
Grants / Parking Garage Management Revenue	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	
<b>Total Sources of Funds</b>	\$ 273,830	\$ 293,830	\$ 147,830	\$ 148,700	
30% BID Assessments	\$ 26,649	\$ 26,649	\$ 27,849	\$ 28,110	
Non-BID Funds Allocated to PROW	\$ 150,000	\$ 160,000	\$ 9,000	\$ 10,000	
<b>Total Economic Restructuring/PROW Income</b>	\$ 176,649	\$ 186,649	\$ 36,849	\$ 38,110	
Project Management					
Area & Planter Maintenance	\$ 12,000	\$ 11,566	\$ 12,000	\$ 12,000	
Security	\$ 12,900	\$ 23,250	\$ 19,000	\$ 20,500	
Security Camera Program	\$ 1,000	\$ 1,000	\$ 4,000	\$ 5,000	
Public Improvement Design Services	\$ 150,000	\$ 150,000			Antioch Ct/ Village Plaza contribution to City of Oakland from private fundraising
Equipment Rentals	\$ 1,000	\$ 833	\$ 1,000	\$ 1,000	
<b>Total Economic Restructuring/PROW Expenses</b>	\$ 176,900	\$ 186,649	\$ 36,000	\$ 38,500	
<b>Economic Restructuring/PROW Income - Expenses</b>	\$ (251)	\$ -	\$ 849	\$ (390)	
40% BID Assessments	\$ 35,532	\$ 35,532	\$ 37,132	\$ 37,480	
Non-BID Funds Allocated to District Identity	\$ 25,000	\$ 35,000	\$ 37,000	\$ 35,000	
<b>Total Promotions and Design (District Identity) Income</b>	\$ 60,532	\$ 70,532	\$ 74,132	\$ 72,480	
Project Management/PR	\$ 10,000	\$ 20,000	\$ 20,000	\$ 21,000	
Pedestrian Lighting/ Holiday Décor	\$ 10,000	\$ 19,820	\$ 18,000	\$ 18,000	
Events and Event Marketing					
Restaurant Walk	\$ 4,000	\$ 2,300	\$ 3,500	\$ 4,500	Revenue neutral or positive
Art Walk	\$ 1,500	\$ 700	\$ 500	\$ 500	Revenue neutral or positive
Beer, Wine and Music Festival	\$ 19,500	\$ 22,000	\$ 18,000	\$ 18,000	Revenue neutral or positive
Montclair Outdoor Movie Nights	\$ -	\$ -	\$ 500	\$ 500	returning in 2023
Farmer's Market	\$ 500	\$ 500	\$ 500	\$ 500	
Halloween - Trick-or-Treat	\$ 500	\$ 500	\$ 500	\$ 500	
Holiday Stroll	\$ 8,000	\$ 8,000	\$ 4,000	\$ 5,000	
Advertising & Design Services - Ads, Website	\$ 5,000	\$ 5,000	\$ 3,000	\$ 4,000	
Social Media Marketing (inc above)					
Marketing Booth Fees/Staffing					
Banners	\$ 1,400	\$ 1,340	\$ 5,500	\$ -	new banner set needed 2023
<b>Total Promotions and Design (District Identity) Expenses</b>	\$ 60,400	\$ 80,160	\$ 74,000	\$ 72,500	
<b>Promotions and Design (District Identity) Income -</b>	\$ 132	\$ (9,628)	\$ 132	\$ (20)	
30% BID Assessments	\$ 26,649	\$ 26,649	\$ 27,849	\$ 28,110	
Non-BID Funds Allocated to Organization/Administration	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	



<b>Total Organization/Administration Income</b>	<b>\$ 36,649</b>	<b>\$ 36,649</b>	<b>\$ 37,849</b>	<b>\$ 38,110</b>	
District Management/Assistants	\$ 27,000	\$ 27,400	\$ 28,250	\$ 28,400	
Office Rent & Storage	\$ 5,096	\$ 5,096	\$ 5,096	\$ 5,096	
Office Supplies	\$ 300	\$ 300	\$ 300	\$ 300	
Bank Fees Minus Interest	\$ -	\$ -	\$ -	\$ -	
Postage/Box Rental	\$ 200	\$ 161	\$ 200	\$ 200	
Accounting/Filing Fees/Licenses	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,200	
Meeting Supplies Expenses	\$ 300	\$ 235	\$ 300	\$ 300	
Insurance	\$ 1,255	\$ 1,255	\$ 1,255	\$ 1,255	
Dues/Subscriptions/Memberships	\$ 100	\$ 25			Oakland Chamber
Utilities/Phone/Internet Service	\$ 1,000	\$ 1,012	\$ 1,050	\$ 1,050	
Computer/Software - Upgrades	\$ 200	\$ -	\$ 200	\$ 300	
<b>Total Organization/Administration Expenses</b>	<b>\$ 36,651</b>	<b>\$ 36,684</b>	<b>\$ 37,851</b>	<b>\$ 38,101</b>	
	\$ -				
<b>Total Income</b>	<b>\$ 273,830</b>	<b>\$ 293,830</b>	<b>\$ 147,830</b>	<b>\$ 148,700</b>	
<b>Total Expenses</b>	<b>\$ (273,951)</b>	<b>\$ (303,493)</b>	<b>\$ (147,851)</b>	<b>\$ (149,101)</b>	
<b>Carryforward/Reserve</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<b>Net</b>	<b>\$ (121)</b>	<b>\$ (9,663)</b>	<b>\$ (21)</b>	<b>\$ (401)</b>	