



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

Rockridge District 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	.5
Cleaning Ambassadors/workers	.33
Public Safety Officers/Security Ambassadors	.33
Hospitality/Business Outreach Ambassadors	.33
Other Seasonal/Part-time staff	.5
Volunteers (not counting your board members)	0

Notes about staffing numbers

We have two principal employees.

1. Chris Jackson who oversees security and streetscape issues. He counts himself as a safety ambassador and merchant/business owner ambassador. this also includes my interaction with the public.
2. Jody Colley works part-time/contract with our BID to provide marketing and administrative assistance.
3. We have a part-time accountant.

How many businesses in your BID? 504

Approximately how many residents in your BID? 0

Approximately how many occupied storefronts in your district? 240

Approximately how many vacant storefronts in your district? 8

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.)

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

What types of work is done by your cleaning staff?

Sidewalk sweeping and clearing gutters

Graffiti removal - public property

Graffiti removal - private property

Street furniture and trashcan maintenance and sanitization

Landscaping services and plant watering

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	150
Number of bags of trash collected	520
Pounds of trash collected (if you measure trash in pounds not bags)	0
Number of Incidents of illegal dumping removed	40
Number of 311 requests made	300
Number of hours of pressure washing	0
Number of stickers/posters removed	60

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

chris@rockridgedistrict.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) 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?

Monitoring security cameras

Crime prevention workshops

Street patrol/ambassadors

Coordination with OPD

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	700
Number of annual patrol hours dedicated by public safety officers/ safety ambassadors hired by the BID to public safety program in 2023	700
Number of merchant checks	700
Number of 911 calls made by the BID	0
Number of non-emergency calls made by the BID	200
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	5
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	08:30 AM	06:00 PM
Tuesday	08:30 AM	06:00 PM

Day of the Week	Start Time	End Time
Wednesday	08:30 AM	06:00 PM
Thursday	08:30 AM	06:00 PM
Friday	08:30 AM	06:00 PM
Saturday	08:30 AM	06:00 PM
Sunday	08:30 AM	06:00 PM

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/maintain public plazas

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	1
Number of tree wells maintained	168
Number of banners on street/light poles installed/maintained	65
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
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)
- 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
- 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	1855	81	58	1.2
Facebook	831	464	41600	2000
Instagram	2600	399	42503	64
Twitter	0	0	0	0
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: 58

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	5000
Number of attendees to events produced by or sponsored/supported by the BID (best estimate):	14000

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)

In-person Merchant outreach & contacts

Business Support Outputs & Operations

Business Support outputs for Calendar Year 2023 by your BID:

	Number
Number of merchant contacts	1273

	Number
Number of business support events coordinated by or supported by the BID for your businesses in 2023	3
Annual total number of your business attendees to business support events coordinated by or supported by the BID	100

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
Due to the cyber hack that occurred to the City of Oakland, and the delay in collecting and disbursing annual merchant Assessments, we had to reduce our spending for 2023 because we were not funded for half of the year.
However, we still produced several Rock-N-Stroll events, drawing visitors to the district for shopping, dining, and live music. Rock-N-Stroll is one full mile of sales, tastings, street musicians, artisan tables, and local artists. Unlike traditional street festivals, Rock-N-Stroll puts the spotlight on district businesses where all of the activities and offers take place.
We also partnered with our neighborhood business group, Rockridge Community Planning Council, and the Oakland Public Library—Rockridge Branch to produce a Halloween Parade that drew thousands to the district. We passed out over 400 trick-or-treat bags to kids, offered crafts by MOCHA, led a DJ Dance Party, librarian story time, interactive music, and more. Plus, over 40 Rockridge businesses passed out treats to the kids, offered free food, crafts, and other fun activities. Families, kids, and pets could participate in a costume contest for prizes.
Minor tree trimming and landscape improvement was done.
We are proud of our supportive relationship with our business owners and continue to be one of the larger tax revenue-producing districts in the city.

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

New program/activity description
We Had 2 Merchant mixers that have involved over 35 merchants in a face-to-face networking event hosted in various BID businesses.0

New program/activity description
<p>We involved – BID members in a Design Sprint, soliciting their opinions on what we might improve, what areas of our district we might better highlight, how we can work together using each other’s strengths, how to encourage our nearby residents to shop and live in Rockridge, as well as how we might more effectively communicate our needs, hopes and goals.</p>
<p>We created a multi-channel WhatsApp account to help our merchants communicate with each other around specific questions and concerns such as security, looking for local merchant help, marketing and promotion collaboration opportunities, and sharing of local resources and tips. This allows our merchants to more effectively communicate with each other directly, not having to go through the RDA staff to answer simple questions and collaborate on shared promotional ideas.</p>
<p>We’ve been able to bring the mayor, chief of police, director of DOT, and a representative from workforce development to meet with our Business owners. (9.23.24)</p>
<p>We produced a larger Rock-N-Stroll than our previous years which included 40 Rockridge businesses, 50 local artists, 22 local bands, and was extremely well attended by local residents and visitors. Of the merchants surveyed post-event, nearly every business said they saw significantly more foot traffic and sales that day. One business said it was their best sales day of the year. We were able to produce the event with only \$8000, and unlike typical street festivals which are relatively much more costly, our event model was on promoting and supporting Rockridge merchants rather than out-of-district vendors.</p>
<p>We were able to complete the addition of decomposed granite to our tree wells to help make for a safer and more pedestrian-friendly environment.</p>
<p>There were two mural trash containers added to the Avenue and funding was provided by the neighborhood group.</p>
<p>We continue to maintain a high Occupancy of our storefronts. We are hovering somewhere in the 98% percentile.</p>

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:


RDA 2023 Financials for 202... .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)

\$7,555.52 was carried over into our reserves to cover any potential short-falls as we transition to a different fiscal year, and move from the penny-pinching uncertainty caused by the years of COVID & cyber-attack uncertainty into a more active stance as a BID to market, protect and care for our district.

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
10000	Donations

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

No

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

186000

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
Monte S McClain	Community Member/Rep	College Avenue Presbyterian Church	President	Current
Matt Zimbalist	Business Owner/Rep	Re-Up	VP	Current

Name	Affiliation Type	Name of Affiliated Business/Org	Title	Status
Robin Pennell	Business Owner/Rep	Jarvis Architects	Treasurer	Current
Veronica Bhonsle	Business Owner/Rep	VERO	Director	Current
Katy Winter	Business Owner/Rep	Vita	Director	Current
Devan Gregori	Business Owner/Rep	Devan Gregori	Director	Current
Christine Garofoli	Community Member/Rep		Director	Current
Louise Rothman-Riemer	Business Owner/Rep	Schultz Collins	Director	Current

Rockridge District Association

2023 Budget & Actuals

Profit and Loss • December 2022- December 2023

	2023 BUDGET	Dec 2022- Dec 2023	%
Income			
BID Revenues	\$ 160,000.00	\$ 180,523.90	
Total BID Revenues	\$ 160,000.00	\$ 180,523.90	
Additional Revenue	\$ 10,000.00		
Prior Years Reserve / Carry Forward		\$ 20,000.00	
Total Income	\$ 170,000.00	\$ 200,523.90	
GROSS PROFIT	\$ 170,000.00	\$ 200,523.90	
Expenses			
Bank Service Charges	\$ 1,500.00	\$ 1,624.91	
Marketing & Promotion Advertising & Graphics	\$ 6,000.00	\$ 1,136.46	
		\$ 8,611.64	
Advertising/Promotional	\$ 250.00	\$ 131.98	
Events	\$ 1,500.00	\$ 3,056.93	
Marketing & Materials	\$ 1,000.00	\$ 620.00	
Rock n Stroll	\$ 16,000.00	\$ 18,025.00	
Web Design & Communication	\$ 19,000.00	\$ 26,544.67	
Total Marketing & Promotion	\$ 45,250.00	\$ 59,751.59	29%
Organization Committee	\$ 3,960.00		
Accounting & Legal		\$ 4,365.00	
Administrative	\$ 6,000.00	\$ 6,500.00	
Insurance	\$ 3,579.00	\$ 1,170.00	
Office Expense	\$ 350.00	\$ 22.00	
Postage, Copy & Printing	\$ 600.00	\$ 2,064.59	
Professional Administration	\$ 400.00		
Payroll Service Fees-Prof Admin		\$ 1,931.81	
Payroll Tax Expense	\$ 1,300.00	\$ 5,744.99	
Wages-Prof Admin	\$ 59,000.00	\$ 30,000.00	
Workers Comp-Prof Admin	\$ 1,600.00	\$ 808.00	
Total Professional Administration			
Total Organization Committee	\$ 78,124.98	\$ 52,606.39	25%
Streetscape & Security Committe			
Pacific Site Management			
Sierra Display			
Canology			
Beautification-Streetscape Misc		\$ 48,446.62	
Security & Public Safety			
Wages-Prof Admin		\$ 42,627.14	
Chris Insurance			
Payroll Tax Expense			
Total Streetscape & Security Committe	\$ 40,000.00	\$ 91,073.76	44%
Uncategorized Expense	\$ 5,000.00	\$ 3,695.38	2%
Total Expenses	\$ (168,469.00)	\$ 207,127.12	
NET OPERATING INCOME	\$ 170,000.00	\$ 200,523.90	
NET INCOME	\$ 1,531.00	\$ (6,603.22)	

Proposed Budget 2025 Rockridge BID

Income	Amount	Percentage
BID Revenue	186,000	
Additional Revenue	10,000	
Total Income	196,000	
Expenses		
Bank service charges	1,500.00	
Marketing & Promotion Committee		
Advertising & Graphics	6,000.00	
Advertising/Promotional	2,000	
Events	2,500.00	
Marketing & Materials	3,000.00	
Merchant Mingles	2,000.00	
Rock n Stroll	16,000.00	
Web Design & Communication	10,000.00	
Total Marketing & Promotion Committee	43,000.00	20%
Organization Committee Accounting & Legal	5000	
Administrative	3000	
Insurance	4000	
Office Expense	350	
Postage, Copy & Printing Professional Administration	600	
Insurance-Prof Admin	400	
Payroll Service Fees-Prof Admin	1300	
Payroll Tax Expense	5000	
Wages-Prof Admin	33,000	
Workers Comp-Prof Admin	2600	
Total Professional Administration		
Total Organization Committee	55,250	25%
<u>Streetscape & Security Committee Beautification-Streetscape Misc</u>		
Pacific Site Management	26,000	
Sierra Display	4,740	
Canology	12,000	
Beautification-Streetscape Misc	14,000	
Security & Public Safety	500	
Wages-Prof Admin	38,500	
Chris Insurance	12,000	
Payroll Tax Expense	4,000	
Total Streetscape & Security Committe	111,740	54%
Uncategorized Expense	2,000	1%
Total Miscellaneous	0	
Total Expenses	211,990.00	
NET OPERATING INCOME	196000	
NET INCOME	-15,990	100%