



Office of the City Manager

CONSENT CALENDAR
May 23, 2023

To: Honorable Mayor and Members of the City Council
From: Dee Williams-Ridley, City Manager
Submitted by: Eleanor Hollander, Economic Development Manager
Subject: Assessments: North Shattuck Property Based Business Improvement District

RECOMMENDATION

Adopt a Resolution approving the North Shattuck Property Based Business Improvement District (NSBID) Annual Report of Fiscal Year (FY) 2023 and proposed budget for FY 2024, and declaring Council's intention to levy an annual assessment for the NSBID for FY 2024.

FISCAL IMPACTS OF RECOMMENDATION

Assessments levied in the North Shattuck Business Improvement District (NSBID) support a package of improvements and activities approved by the property owners and the City Council when the District was renewed for a ten year period on June 16, 2020 (Resolution No. 69,454–N.S). Assessment funds are collected by Alameda County, relayed to the City of Berkeley, and disbursed through a contract with the North Shattuck Association (NSA), a private owners' association that was established to implement the Management District Plan.

In June of 2020, the City Council authorized the City Manager to execute a contract and any amendments with the North Shattuck Association, not to exceed \$2,652,778 of BID revenues, to implement the North Shattuck Management District Plan for the period July 1, 2020 to June 30, 2031 (Contract No. 32100055). The contract covers the years remaining in the current term of the NSBID establishment.

NSBID assessments are projected and budgeted at approximately \$210,363 in FY 20234. Assessment funds are deposited into NSBID Fund 785-21-208-251-0000-000-000-412110 and expended from fund 785-21-208-251-0000-000-446-636110. Though the NSBID's adopted Management District plan allows for an annual 5% assessment increase for inflation, the majority of the North Shattuck Association's Board of Directors met on March 30, 2023, and determined that no rate increase was warranted in FY24 as the current assessment sufficiently covers the slate of services proposed for the coming year. Project funds not spent in any given fiscal year are carried over into future years.

By financing improvements, maintenance and marketing activities for the North Shattuck business district, the NSBID indirectly enhances sales tax, business license tax and other business-related City revenue sources. No City properties have been or will be assessed in the NSBID.

CURRENT SITUATION AND ITS EFFECTS

State legislation that authorizes formation of property-based BIDs (*California Streets and Highways Code*, Sections 36600 et. seq.) requires that the BID governing body submit an Annual Report on operations and a budget proposal to the City Council each year. The City Council may approve the report with a Resolution to reauthorize the annual assessments.

The Board of Directors of the NSA met in a publicly noticed meeting on March 30, 2023 to review and approve the attached Annual Report for the NSBID for FY 2023 (Exhibit A). The report includes a budget for improvements and activities for FY 2024 and an estimated cost for providing them. The report also recommends that the assessments for FY 2024 be levied on the same basis and method, and within the same boundaries, as they were levied for FY 2023 *without* the allowable annual 5% fee increase. See Exhibit B: North Shattuck BID FY 2024 Assessment Roll. Council can adopt the recommended resolution which will confirm the NSBID assessment, thus enabling continuous BID operations in the North Shattuck district for another year.

BACKGROUND

The NSBID was first established by Resolution of the Berkeley City Council in 2001 (Resolution No. 61,168-N.S.) to implement a Management District Plan that had been developed by a steering committee of merchants and property owners. In accordance with the Management District Plan adopted in Resolution No. 61,168-N.S, the NSBID had a lifetime of ten years, expiring in 2011. On May 3, 2011, Council approved Resolution No. 65,265-N.S. reestablishing the NSBID for 10 more years, ending in Fiscal Year 2021. Further, on June 16, 2020, Council approved Resolution No. 69,454–N.S. reestablishing the NSBID for an additional 10 years. Thus, the NSBID is authorized through 2031 unless action is taken to dis-establish it.

The NSBID finances special improvement, maintenance and marketing activities that benefit commercial properties and businesses in the North Shattuck District. NSBID activities are performed above and beyond baseline services provided by the City. The Management District Plan for the North Shattuck BID that was adopted by Council in 2020 as part of the reestablishment of the District provides a framework and budget for the NSBID’s activities.

In FY 2024, the NSBID will continue its ongoing services including District maintenance, public improvements, holiday lighting, and marketing/promotional activities. The NSBID will continue to provide cleaning and outreach services in the public right of way. Events and activities promoting the District will continue throughout the year, including winter holiday promotions and safe group outdoor commerce installations. Regular arts and events newsletters will be shared, and

ongoing marketing efforts will continue via the NSBID website and other social media. The NSBID will also continue to liaise and coordinate with other business district organizations, Visit Berkeley, the Chamber of Commerce, and the Berkeley Business District Network (BBDN) to promote local business and economic development opportunities in Berkeley.

ENVIRONMENTAL SUSTAINABILITY AND CLIMATE IMPACTS

By maintaining and enhancing the District, the NSA creates shopping opportunities for residents and visitors alike while encouraging alternative forms of transportation. The District is walking distance from the North Berkeley and Downtown Berkeley BART Stations. Several AC transit lines provide easy accessibility to visitors coming to this popular regional destination. Because the District is well served by public transportation and biking infrastructure, these services support environmental sustainability goals of encouraging alternative transportation choices and reducing vehicle miles traveled.

RATIONALE FOR RECOMMENDATION

Property and Business Improvement District Law of 1994 requires that the BID Board prepare an Annual Report for each fiscal year in which assessments are to be levied. Council action is required to approve the BID's Annual Report, and declare its intent to levy assessments.

This private/public partnership generates significant resources for revitalization of the North Shattuck District has a positive effect on the physical and economic health of the City of Berkeley.

ALTERNATIVE ACTIONS CONSIDERED

The Board of the NSBID considered opting for the allowable 5% increase in assessment rates but instead decided not to levy an increase in the assessment rate, declaring that an increase, would not be necessary to cover the slate of proposed services. The NSA Board determined that the existing assessment level would be sufficient to address the goals outlined in the FY2024 budget and work plan.

CONTACT PERSON

Eleanor Hollander, Office of Economic Development, (510) 981-7536

Attachments:

- 1: Resolution: Confirm Annual Report and Levy Annual Assessment
Exhibit A: NSBID Report for FY 2023 and Proposed Budget for FY 2024
Exhibit B: North Shattuck BID FY 2024 Assessment Roll

RESOLUTION NO. ##,###-N.S.

APPROVING THE ANNUAL REPORT OF THE NORTH SHATTUCK BUSINESS IMPROVEMENT DISTRICT FOR FISCAL YEAR 2023 AND DECLARING INTENT TO LEVY ASSESSMENTS FOR FISCAL YEAR 2024.

WHEREAS, the Property and Business Improvement District Law of 1994 as amended (California Streets and Highways Code Section 36600 et. seq.) authorizes cities, with the consent of property owners, to fund property-related improvements, maintenance and activities through the levy of assessments upon the real property that benefit from the improvements, maintenance and activities; and

WHEREAS, after ten years of successful operation, on June 16, 2020 the Berkeley City Council reestablished the North Shattuck Business Improvement District (hereafter, “the District”) for an additional ten-year period by Resolution No. 69,454-N.S.; and

WHEREAS, on March 30, 2023 the Board of Directors of the North Shattuck BID adopted the *Annual Report to the City of Berkeley FY 2023* (hereafter “Annual Report”) that describes the operations of the District in FY 2023, recommends services for FY 2024 and proposes a budget for FY 2024 (Exhibit A).

NOW THEREFORE, BE IT RESOLVED by the Council of the City of Berkeley that pursuant to provisions of Section 36600 et. seq. of the California Streets and Highways Code, the City Council approves the Annual Report of the North Shattuck Association (Exhibit A) and declares its intent to levy special assessments on property within the boundaries of the District for FY 2024.

BE IT FURTHER RESOLVED that that the boundaries of the District and the method and basis for the assessment remain the same as those set forth and approved in the Management District Plan (Plan) that was adopted on June 16, 2020, when Council renewed the North Shattuck BID through Resolution No. 69,454-N.S.

BE IT FURTHER RESOLVED that the improvements and activities to be provided are those described in the Plan and the Annual Report.

BE IT FURTHER RESOLVED that the cost of providing the improvements and activities is as described in the budget that accompanies the Annual Report.

BE IT FURTHER RESOLVED that the Assessment Rate for FY 2024 shall not increase from the rates established in FY 2023 (despite the fact that an increase of 5% is allowed annually by the District Management Plan). Following adoption of this resolution, the City Council may confirm the Annual Report and levy assessments for FY 2024 and confirm disbursement of NSBID assessment revenue to the North Shattuck Association provided for in Contract No.32100055, authorized in Resolution No. 69,455–N.S. (2020).

Exhibit:

A: North Shattuck Annual Report for FY 2023 and Proposed Budget for FY 2024

B: NSBID Assessment Roll FY 2024



NORTH SHATTUCK ASSOCIATION
ANNUAL REPORT TO THE CITY OF BERKELEY
FISCAL YEAR 2023

Introduction

The North Shattuck Business Improvement District (NSBID) was reestablished for a new 10-year period by the Berkeley City Council on June 16, 2020 (Resolution No. 69,454-N.S.) under provisions of the State of California Property and Business Improvement District Law of 1994. The NSBID was formed in 2001 and renewed in 2011 and again in 2020 to implement a Management District Plan developed and revised in 2020 to address the specific needs of the District and which sets forth the projected activities of the NSBID and the allocation of BID assessment revenues to each activity.

The renewed North Shattuck BID consists of 54 parcels owned by 52 property owners, generally bounded by Rose on the north, Delaware on the south, taking in the block of Vine east of Shattuck Ave. The assessments fund special benefits within the District, enhancing the North Shattuck area's streetscape environment with infrastructure improvements, ongoing maintenance, and special events to new customers and visitors, increase business sales, and attract and retain businesses.

The NSBID is managed by the non-profit North Shattuck Association, whose Board of district business and property owners and Executive Director coordinate implementation of the Management Plan. The Property and Business Improvement District Law of 1994 requires that the owners' association that is responsible for administering a BID prepare an annual report for each fiscal year for which assessments are to be levied.

This report reviews Fiscal Year 2023 operations, and states goals and objectives for Fiscal Year 2024 of the NSBID, which begins July 1, 2023 and ends June 30, 2024. This report includes the improvements and activities for the year, an estimate of the cost of the improvements and activities, the amount of any surplus or deficit revenues are to be carried over from the previous fiscal year and the amount of any contributions from other sources are named in the annual report and budget. There are no proposed changes in the boundaries of the district nor to the method and basis for levying the assessment.

FY 2023 Annual Report

Summary of FY23 Budget

The budget for Fiscal Year 2023 included BID assessments which resulted in new revenue of **\$209,443**, **carryforwards of \$22,436 from FY 2022**, which added to new revenue resulted in a FY 2023 budget of **\$231,879**. The following table shows the Budget Allocations by category and percentages as well as the estimated expenditures to the end of the fiscal year on June 30, 2023. Total expenditures for the year are estimated to be **\$188,433** with the remaining funds to carry forward in each category to FY 2024.

<i>NORTH SHATTUCK ASSOCIATION Service/Expense Category</i>	<i>Allowable % of Annual Budget</i>	<i>Carry Forward from Fiscal Year 2022 (Actual)</i>	<i>Fiscal Year 2023 Assessment Revenue</i>	<i>2023 Budget with Carry Forward & New Revenue</i>	<i>Fiscal Year 2023 Expenditures (Estimated to 6/30/23)</i>
Maintenance/Civil Sidewalks	40%	\$3,154	\$83,777	\$86,931	\$69,313
District Identity & Placemaking	25%	\$2,803	\$52,361	\$55,164	\$55,440
Administration/Management	30%	\$7,418	\$62,833	\$70,251	\$63,680
Contingency	5%	\$9,061	\$10,472	\$19,533	\$ 0
Total Budget	100%	\$22,436	\$209,443	\$231,879	\$188,433

Accomplishments

During Fiscal Year 2023, the North Shattuck Association continued implementation of the activities and services outlined in the Management District Plan under a renewed annual contract between the City of Berkeley and the North Shattuck Association (NSA). Activities of the district are organized into Administration/ Program Management, District Identity and Placemaking, and Maintenance/Civil Sidewalks. Accomplishments in each area are summarized below.

Administration/Program Management

- The Executive Director held regular meetings of the Board of Directors and General Association meetings with merchants, property owners, City staff and elected officials were held in person when possible and via Zoom regularly during the year to further the goals and objectives of the Association, focusing on business assistance during the continuing recovery from the Covid-19 pandemic, resumption of special events, and addressing safety and maintenance concerns in the district.
- Business and property owners were provided regular updates on pandemic health orders, financial relief and technical assistance available through various agencies including State Covid Relief grants to small businesses and the City's Outdoor Commerce program.
- The Association coordinated meetings of merchants, property owners, BPD, and the City's Homeless outreach and mental health teams to deal with safety and security issues at various locations and held a district wide Safety Meeting in October 2022 to update and educate the membership on the reporting of various incidents for a more coordinated response during the holidays.
- The Association Board voted to reallocate funds to implement a 3-month pilot Safety Ambassador Program for the district and contracted with Peralta Service Corporation to provide on-street hospitality and coordination on city maintenance and safety issues.
- The Association worked with the Berkeley Business District Network (BBDN) to

address and provide input on citywide issues and programs including the Small Business Support Package of zoning changes and clarifications. The group also advocated for public safety through the reinstatement of police bike patrols in commercial areas and expansion of the Mental Health Outreach Teams.

- The Executive Director assisted businesses to plan and upgrade outdoor commerce areas, including design assistance, movement of equipment, and construction of new permanent parklets through the City's Pathways to Permanence program, which waives permit fees and which will allow businesses to continue operations in the public right-of-way with payment of parking fees after lifting of the City's emergency order. The Association assisted Victory Point Café to complete their parklet upgrade this year, coordinated planning for the Saul's Deli project, and continued to coordinate the City's Outdoor Commerce Grant program which provides grants to businesses citywide to build parklets.
- The Association coordinated with the Berkeley Chamber and Visit Berkeley on citywide events and marketing programs including Restaurant Week, the Berkeley Holidays campaign, the Berkeley Bucks program, and the City's "Discovered in Berkeley" series, which featured The Victory Point Games Café this year.
- The Executive Director worked with the Ecology Center on the Farmers Market Thursday operations, vendors, and marketing, and attended Community Advisory meetings to plan for more music and activities in the market area, including an expanded 8-week series of "Thirsty Thursday" events during the fall of 2022, and a Food Waste Cooking demonstration series at the market in March and April 2023.
- The Association maintained an inventory of all businesses and vacant retail and office space in the district and provided updates to the City's Economic Development office. This year, the Benchmark Boulderling Gym opened in the former Walgreen's store at Cedar and Shattuck, and renovation of the former Dara Lao building by the celebrated Farmhouse Thai restaurant group began. Three new businesses opened in the rehabbed storefronts at Delaware St., and Epicurious Garden welcomed Darband Mediterranean. The Bank of America branch and Campus Auto, along with Siamese Dream, Himalayan Imports and Cose Belle boutiques closed in the district this year.
- The Board met with the developer of the former Campus Auto site to review preliminary plans for a mixed-use structure and initiated discussions with the Bank of America on future plans for the site and parking lot as well as maintenance of the property.
- The Executive Director assisted with city health, noise and street event permits and coordination for Saul's 36th anniversary street party, ACCI Gallery's Spring Art Fair, the Chocolate and Chalk Art Festival and the Winter Festival with Saul's Latke Party.

Civil Sidewalks/Maintenance

- The Association expanded funding for cleaning and regular maintenance for sidewalks, public spaces, and public property including sidewalk and gutter sweeping, weeding of tree wells, graffiti abatement and maintenance of the newly replanted landscaped ceramic planters throughout the district.

- The Executive Director coordinated with the City of Berkeley and Berkeley Police Department to address maintenance issues including street tree replacements, and sidewalk steam cleaning and repair, trash receptacle maintenance, etc. as well as street behavior and vandalism, trespassing and illegal dumping issues on private property and sleeping during the day in the public right of way. Merchants were informed of available services and appropriate numbers for reporting incidents and requesting assistance for mental health issues and a District Safety Meeting was held in October to prepare for the holidays.
- In response to ongoing issues, the Association Board voted to implement a 3-month pilot Safety Ambassador Program for the district with Peralta Service Corporation to provide a welcoming presence for tenants, visitors, shoppers, and employees, to be additional "Eyes and Ears" for local community and law enforcement and develop and maintain active relationships with City Officials, Beat Officers, Fire Department and Public Works Department to assist in the intervention and prevention of crime.
- The Association installed the annual holiday lighting for the entire length of the district for the winter holiday season in the sidewalk street trees as well as in median tree locations with electricity access. The lighting provides ambience as well as security and pedestrian lighting in the darker winter evenings.

District Identity/Placemaking

- District marketing includes the monthly Constant Contact e-newsletter with updates on business operations and hours, specials, events, and classes, regular social media posts and boosts for businesses and special events, and print and digital ads on local media and in the Berkeley Visitors Guide to promote the district. The Association website has been updated to reflect current businesses in the online directory and links to ongoing in-person and hybrid classes and events, including the weekly North Berkeley Food Tour and Farmers' Market, monthly art openings, wine tasting, and cooking, yoga and barre classes.
- The Association coordinated with the Chamber, Visit Berkeley and the City on the Berkeley Holidays, Berkeley Bucks, Restaurant Week, and Discovered in Berkeley campaigns, promoting business participation and the programs and offerings through our social media outlets, and the participated in Shop Local social media campaigns through AMIBA promoting support for small independently-owned businesses.
- The 2022 Chocolate & Chalk Art Festival was held on August 18 in partnership with Another Bullwinkel Show in with funding from a Civic Arts Recovery Grant of \$15,000 for fiscal years 2022 and 2023. The event included a sidewalk chalk art contest with chocolate specials from area shops and artisan vendors. The theme was "Chalking Beautiful Music", and grant funds provided for increased marketing and outreach for the event, professional artist works, local musical groups, and larger prizes for chalk artists in the contest.
- The Executive Director worked with the Ecology Center to organize and present a

weekly series of “Thirsty Thursdays” events in September and October 2022 at the North Berkeley Farmers Market with live music from the Berkeley High Jazz Band and other local acts, sustainable beer and wine, an Ecology Center pop-up shop and program booths, kid’s art projects and an Association marketing table with business information and giveaways.

- The Association funded a Fall music series with combos from the Berkeley High Jazz Band to play on Saturdays outside the Post Office, hosted by M. Lowe & Co. Jewelers, to provide activity on the street and provide ongoing support for the Jazz program.
- A new holiday event, the North Berkeley Winter Festival, was held on Dec. 18th in conjunction with the annual Saul’s Latke Party. The event was a celebration of the first day of Hanukkah and the holiday season and included Berkeley High Jazz combos and local Klezmer group the Veretski Pass. There were children’s games and art projects, free face painting, and a Snow Queen, along with local artisan vendors and food and drinks booth.
- As part of the North Berkeley in Bloom recovery campaign the Association worked with local artist Rigel Stuhmiller to produce a new series of decorative light pole banners to line Shattuck Ave. The banners have colorful hand drawn bird and flowers to fit the theme of re-opening and spring. A press release and direct mailer promoting the project and shopping locally were also planned for later in 2023.
- The Association helped coordinate another ACCI Gallery Art Fair on May 6th with more than 20 ACCI member artists selling their work on Lincoln St. The sale coincided with their biannual exhibition of garden and botanical themed pieces, and included a plant sale by the Berkeley Garden Club.

Budget - Fiscal Year 2024

Work Plan

The North Shattuck Association will continue implementation of the activities initiated in previous fiscal years and in accordance with the Management District Plan. Funds not expended in the previous year will be carried forward in addition to estimated Fiscal Year 2024 revenues. The work of the Association will continue to be guided by the Board of Directors and its committees. The goals and objectives for Fiscal Year 2024 are organized as outlined in the Management District Plan adopted in 2020.

Administration/Program Management

Goals: General oversight and direction of district activities; development of relations and coordination with outside groups and agencies, coordination of projects and programs, management of sponsorships and volunteers.

Objectives:

- 1) Oversee development of annual District work plan and detailed budgets, financial records and annual tax returns.
- 2) Conduct property owner outreach, property owner and business input to the Management Plan and various programs and activities.
- 3) Attend needed City of Berkeley Council and Commission meetings and prepare all

- required reports related to the annual City of Berkeley contract with the Association.
- 4) Prepare correspondence, letters of support, and grant applications with the City of Berkeley and other agencies.
 - 5) Coordinate Board elections in July 2023 including nominations and property owner balloting.
 - 6) Maintain working relationships with property owners, merchants, City of Berkeley, Chamber of Commerce, Visit Berkeley, and elected officials.
 - 7) Continue to participate in the Berkeley Business District Network (BBDN) to review and evaluate proposed City policy changes, public improvement projects, planning changes and zoning amendments relevant to the commercial district. Coordinate with district businesses and property owners to develop appropriate responses and present to City Council and Commissions.
 - 8) Identify and act on any business education/assistance needs for business retention and inform businesses and property owners on how to access all available business support financial and technical services.
 - 9) Develop and distribute regular e-mail newsletter updates to business and property owners with service accomplishments, event information, issue updates, and new business contacts.
 - 10) Maintain inventory and lease information for vacant retail and office space in the district, current information for zoning regulations/amendments, and liaison with City and commercial brokers to attract and assist new businesses.
 - 11) Prepare funding applications for public art and events through the City and State grant programs and administer projects and reporting.
 - 12) Coordinate the City's Outdoor Commerce Grant Program and assist businesses with creating outdoor areas, upgrading structures and extending permits beyond the pandemic.
 - 13) Continue to work on parking issues in the district with the GoBerkeley Parking Program and investigate of improved usage of existing private parking resources for paid employee parking.
 - 14) Work with the Berkeley Public Education Foundation, local schools and the Berkeley Business District Network to strategize on additional fundraising events to provide additional funding for classroom grants, for theater, science, art and gardening programs.

District Identity & Placemaking

Goals: Create a unified, quality image for the district and implement promotion strategies that capitalize on the unique aspects of the area, including advertising, social media, brochures, special events, holiday promotions etc. Strengthen the physical environment and sense of place with public art, landscaping improvements and parklets, and other initiatives as developed.

Objectives:

- 1) Oversee implementation of the marketing and promotions strategy including designer/consultant selections, design processes, budgeting, and advertising placements.

- 2) Manage and promote the special events calendar and institute new events to further the image and various market segments of the district, including apparel, culinary, artisan production, and arts.
- 3) Integrate existing businesses into special events and marketing campaigns through various means, including sponsorship, participation, promotional tie-ins, etc.
- 4) Coordinate public relations for the district and special events as needed. Generate press releases and promote editorial pieces on commercial and retail developments in the area.
- 5) Continue regular updates of the district website with business information and upcoming classes, special events, etc., produce a monthly Constant Contact e-newsletter, and maintain regular Facebook and other social media entries promoting business activities and press coverage.
- 6) Promote events at nearby venues such as Live Oak Park, the Jewish Community Center, Berkeley Arts Center, Theatre First and the Hillside Club. Work with producers to tie in district businesses through advertising and promotions.
- 7) Work with the City and Ecology Center on issues related to the Farmers Market operations and marketing. Coordinate Thirsty Thursday events during the summer of 2023 (FY24), and other special events and business tie-ins to the market.
- 8) Assist businesses to produce smaller street events including ACCI Gallery's Seconds Sale and Art Market, Saul's Latke Party, Vine St. block parties with Vintage Berkeley, etc. and to involve other businesses as partners and participants.
- 9) Oversee installation of annual winter holiday street tree lighting throughout the district.
- 10) Organize a Winter holiday marketing plan and events calendar including a Winter Festival, a holiday music series, etc. and promotion of business events.
- 11) Identify a non-profit partner and produce a Wine Walk fundraiser event, coordinating wineries, business participation, and marketing.
- 12) Produce the "Taste of North Berkeley" restaurant walk to benefit local charities and highlight neighborhood shops and restaurants.
- 13) Organize Association booths/tables at the weekly Farmers' Market and other fairs and festivals with activities to promote the district and gain newsletter and social media subscribers.
- 14) Investigate grant funding opportunities and provide coordination between area businesses and property owners, City Departments, and outside agencies towards implementation of district- initiated projects and programs towards median improvement, pedestrian safety, improved bike facilities, and parking.
- 15) Investigate design and finding possibilities for a median landscaping improvement project to coincide with the Shattuck Ave. roadway repair project, including possible City funding and a UC Berkeley design class and Chancellor's Grant application/award.
- 16) Investigate opportunities for public art projects with ACCI Gallery, local artists, and local schools, including rotating storefront exhibits, art projects, temporary mural projects, etc.

Maintenance and Civil Sidewalks

Goals: Address issues related to cleaning and maintenance of the district; design and implement landscaping and other streetscape beautification improvements; provide input on development projects.

Objectives:

- 1) Provide ongoing area maintenance monitoring, needs assessment, and coordination with appropriate city departments on projects including street tree replacements, curb repairs, median landscaping, trash receptacle cleaning, sidewalk repairs, bicycle facilities etc.
- 2) Oversee service contract with Peralta Service Corporation for regular sidewalk cleaning and landscaping including sidewalk planters and tree well maintenance and special projects as needed.
- 3) Manage the work of the district's Safety Ambassadors to provide hospitality functions, connect with maintenance staff and area businesses, and address security and safety issues working with the Berkeley Police Department and Mental Health Teams.
- 4) Organize meetings of district businesses, property owners, Ambassadors, current BPD patrol officers and the City's Mental Health team to identify and respond to street behavior issues, trespassing and illegal dumping issues, vandalism, and blocking of the public right of way.
- 5) Coordinate work of the City-funded Streets Team to assist with area clean-up for the district's allotment of one afternoon per week and arrange for gift cards or other compensation for team members.
- 6) Work with property owners and appropriate city departments to address signage conditions and the appearance of empty storefronts and vacant properties in the district.
- 7) Work with appropriate City departments, business and property owners, contractors, and volunteer designers to assist businesses to create and upgrade Outdoor Commerce areas in the district.

FY 2024 Budget

BID collections for Fiscal Year 2024 are projected to be \$210,363, with no annual increase in assessments from Fiscal Year 2023. An estimated carryforward of \$83,337 in unexpended funds from Fiscal Year 2023 will be added to each expense category for a total budget of \$293,700. Services and expenditures will be made in accordance with the Management District Plan categories as follows:

<i>NORTH SHATTUCK ASSOCIATION Service/Expense Category under 2021 Management Plan</i>	<i>% of Annual Budget</i>	<i>Estimated Carryforward from 2023 Fiscal Year</i>	<i>Fiscal Year 2024 Projected New Revenues</i>
Maintenance & Civil Sidewalks	40%	\$24,572	\$84,145
District Identity & Placemaking	25%	\$13,879	\$52,591
Administration/Program Management	30%	\$15,013	\$63,109
Contingency	5%	\$29,873	\$10518
Total Estimated Budget	100%	\$83,337	\$210,363

The above budget is based upon the maximum amount of BID assessment revenues that could be collected in the District. Actual BID revenues may be lower if some assessments are not paid within the Fiscal Year. No changes to the boundaries of the district and the method and basis for levying the BID assessments were taken this year.

A listing of Fiscal Year 2024 assessments is attached as Exhibit B to this report.

Approved by:

Approved by the Board of Directors
Kirk McCarthy, President, North
Shattuck Association

On March 30, 2023

Prepared by: Heather E. Hensley, Executive Director, North Shattuck Association

North Shattuck Business Improvement District
FY 2024 Assessment Roll

APN	Owner Name	Site Address	FY 2024 Assessment			
			Private Parcels	Public / Exempt	Utilities	
058 -2173-002-03	1600 SHATTUCK ASSOCIATES	1600 SHATTUCK AVE #1010	\$ 8,799.50			
058 -2173-004-00	IRA SERVICES TRUST	1620 SHATTUCK AVE	\$ 916.84			
058 -2173-005-00	KIM SAMIL & YOUNGJUNG	1650 SHATTUCK AVE	\$ 1,968.00			
058 -2174-001-00	ARTS & CRAFT COOPERATIVE INC	1652 SHATTUCK AVE	\$ 1,588.26			
058 -2174-002-00	NEIL JOE R & CAROL L	1654 SHATTUCK AVE	\$ 1,208.92			
058 -2174-003-00	SATAKE 1 LLC	1662 SHATTUCK AVE	\$ 1,115.48			
058 -2174-004-01	1995 KAM Y LAM & SHUN FAMILY TRS	1670 SHATTUCK AVE	\$ 1,168.60			
058 -2174-006-02	ERDMAN JOHN C & ANNE M TRS	1690 SHATTUCK AVE	\$ 4,939.60			
058 -2175-001-01	SCHWARTZ MICHELL J	1700 SHATTUCK AVE	\$ 3,849.16			
058 -2175-003-00	BLUME JAMES & FRANK KATHRYN W	1708 SHATTUCK AVE	\$ 1,455.80			
058 -2175-004-00	ROBINSON SCOTT & CHRISTINA C	1720 SHATTUCK AVE	\$ 737.34			
058 -2175-005-00	PIERACKI ANDRZEJ TR	1730 SHATTUCK AVE	\$ 1,096.30			
058 -2175-006-00	YI CHONG S	1748 SHATTUCK AVE	\$ 1,262.50			
058 -2176-001-01	1752 SHATTUCK LLC	1752 SHATTUCK AVE	\$ 2,600.60			
058 -2176-003-01	SHATTUCK INVESTMENT GROUP LLC	2083 DELAWARE	\$ 9,047.46			
058 -2177-015-01	GEDR HILLSIDE LLC	1797 SHATTUCK AVE	\$ 13,442.96			
058 -2178-018-00	AMERICAN COMMONWEALTH ASSOC.	2109 VIRGINIA ST	\$ 6,159.30			
058 -2178-023-00	DELANDA PAUL & SUSAN/KENDALL BETTY L	1619 SHATTUCK AVE	\$ 1,353.50			
058 -2178-024-01	SHATTUCK CONNECTIONS LP	1607 SHATTUCK AVE	\$ 8,794.50			
058 -2178-026-00	SHATTUCK OFFICE LLC	1625 SHATTUCK AVE	\$ 1,584.10			
058 -2178-027-00	SHATTUCK OFFICE LLC	1625 SHATTUCK AVE	\$ 2,654.50			
058 -2178-028-00	SHATTUCK OFFICE LLC	1625 SHATTUCK AVE	\$ 2,654.50			
059 -2260-001-00	CONNOLLY ALLEN & CHRISTINE	2100 VINE ST	\$ 3,710.20			
059 -2260-002-01	WALNUT SQUARE CENTER LP	2110 VINE ST	\$ 8,289.50			
059 -2260-015-01	SWEET BOMBAY INC	1549 SHATTUCK AVE	\$ 1,212.80			
059 -2260-015-02	MANN MELVIN M TR	1543 SHATTUCK AVE	\$ 2,039.18			
059 -2260-016-00	GOODMAN CAROL E TRS ETAL	1537 SHATTUCK AVE	\$ 2,255.36			
059 -2260-017-00	GACH MICHAEL R	1533 SHATTUCK AVE	\$ 1,680.30			
059 -2260-018-00	LAM KELVIN S & JACKIE S/LAM GRACE & ALICE	1531 SHATTUCK AVE	\$ 3,526.08			
059 -2260-019-00	MEYER PATRICIA L TRS & WARD DAW	1525 SHATTUCK AVE	\$ 2,268.24			
059 -2260-020-03	APTE ROBERT Z & EVELYN L FAMILY	1519 SHATTUCK AVE	\$ 2,895.72			
059 -2260-021-00	PAGNOL ET CIE INC	1517 SHATTUCK AVE	\$ 1,119.68			
059 -2260-022-01	WONG PUI & HOSANNA H	1515 SHATTUCK AVE	\$ 1,044.96			
059 -2260-022-02	ELITE PROPERTIES LLC	1511 SHATTUCK AVE	\$ 3,208.62			
059 -2261-001-02	RUE ELL ENTERPRISES INC	1451 SHATTUCK AVE	\$ 10,768.12			
059 -2261-004-03	WALNUT VINE LLC & WALNUT STAY	1444 WALNUT ST	\$ 2,287.68			
059 -2261-005-00	RUEGG & ELLSWORTH	2113 VINE ST	\$ 1,125.50			
059 -2261-006-00	RUEGG & ELLSWORTH	2111 VINE ST	\$ 1,993.76			
059 -2261-007-00	RUEGG & ELLSWORTH	1495 SHATTUCK AVE	\$ 2,655.00			
059 -2261-008-00	TARVER DEWEY G & CARMEL A TRS	1481 SHATTUCK AVE	\$ 1,143.80			
059 -2261-009-00	LATKE ENTERPRISES LLC	1475 SHATTUCK AVE	\$ 1,383.00			
059 -2261-010-00	WONG HENRY F TR & WONG PUI T E	1463 SHATTUCK AVE	\$ 2,412.24			
059 -2262-001-00	SHATTUCK ROSE L P	1400 SHATTUCK AVE	\$ 5,768.68			
059 -2262-005-00	HIRAHARA BRIAN & TAMURA RAYMOND	1480 SHATTUCK AVE	\$ 3,009.04			
059 -2262-006-00	RIPSTEEN RYAN & ARLINGTON INVESTMENT CO	2085 VINE ST	\$ 1,334.56			
059 -2262-021-02	SAFeway INC	1425 HENRY ST	\$ 22,794.68			
059 -2262-021-03	SAFeway INC	1425 HENRY ST	\$ 1,761.80			
059 -2263-003-01	HEFTER & MURPHY LLC	2044 VINE ST	\$ 4,547.54			
059 -2263-006-01	BANK OF AMERICA NATIONAL TRUST	1516 SHATTUCK AVE	\$ 4,326.08			
059 -2263-009-00	PRIMA DONNA HOTELS INC	1540 SHATTUCK AVE	\$ 1,647.40			
059 -2263-010-01	BERKELEY BAZAAR PARTNERS	1550 SHATTUCK AVE	\$ 18,076.68			
059 -2263-024-01	BANK OF AMERICA NATIONAL TRUST	1536 SHATTUCK AVE	\$ 2,415.90			
060 -2455-064-01	CALTHORPE PETER & DRISCOLL JEAN	2095 ROSE ST	\$ 3,219.82			
060 -2455-067-00	GORDON JOHN K & MITCHELL JANIS	2091 ROSE ST	\$ 6,044.00			
Totals			Private Parcels	Public / Exempt	Utilities	Totals
Revenues			\$210,363.51	\$0.00	\$0.00	\$210,363.51
Count of Properties			54	0	0	54
County Collection Fee @ 1.7%:			\$ 3,576.18	Net Assessment Revenue:		\$206,787.33

Note: Data for APN, Owner and Land Use from the City's Land Management System is current as of April 2023.
Updated data from the County current as of December 31, 2022, will be available in July 2023.