To: Honorable Mayor and Members of the City Council

From: Dee Williams-Ridley, City Manager

Submitted by: Jordan Klein, Acting Manager, Office of Economic Development

Subject: Assessments: North Shattuck Business Improvement District

RECOMMENDATION

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 May 3, 2011 (Resolution No. 65,265-N.S.). Collections from those assessments are projected and budgeted at approximately $174,011 in FY 2018. Annual assessment funds are deposited into NSBID Fund 478-8703-370-30.01 and expended from fund 478-8703-465-35.10. The proposed assessment rates for FY 2018 are to stay the same as they were in FY 2017 (no increase). Project funds not spent in any given fiscal year are carried over into future years.

The NSBID is authorized through 2021 unless action is taken to disestablish it. Currently, the North Shattuck Association has an active contract with the City in the amount not-to-exceed $548,570 in BID revenues to implement the Management District Plan for the North Shattuck Business Improvement District for the period July 1, 2017 to June 30, 2019 with the option to extend the contract for two additional fiscal years. As such, the proposed contract with the exercised options would cover the years remaining in the current term of the NSBID establishment. The NSBID allows for the owners’ association to increase rates by as much as 5% per year by a majority vote. Therefore, the total not to exceed amount of the contract (established in FY 2017) is approximately $548,570 to account for fiscal years 2017 through 2019.

Funds received from Alameda County will be disbursed through a contract with the North Shattuck Association (hereafter, the “Association” or “NSA”) a private organization that manages the services provided by the NSBID. The contract has been entered into the City’s contract database and assigned Contract No. 10326.
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 North Shattuck Association (NSA), the non-profit that manages the NSBID, met in a publicly noticed meeting on April 20, 2017 to review and approve the attached Annual Report for the NSBID for FY 2017 (Exhibit A). The report includes a budget for improvements and activities for FY 2018 and an estimated cost for providing them. The report also recommends that the assessments for FY 2018 be levied on the same basis and method, and within the same boundaries, as they were levied for FY 2017 with no fee increase. See Exhibit B: North Shattuck BID FY 2018 Assessment Roll.

Council can adopt the recommended resolutions which will confirm the NSBID assessment and implementation contract with the North Shattuck Association, and thus enable continuous BID operations for another year.

BACKGROUND
The NSBID was established by Resolution of the Berkeley City Council on July 10, 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 this Management District Plan that was incorporated 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 an additional 10 years, expiring in 2021.

The NSBID finances special improvement, maintenance and marketing activities that benefit commercial properties and businesses in the North Shattuck District. NSBID activities are over and beyond baseline services provided by the City.

The Management District Plan that was adopted by Council in 2011 as part of the reestablishment of the District provides an overall format and budget for the NSBID’s activities. In FY 2018, 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 the large Sunday Streets event held in conjunction with the Downtown Berkeley Association in the late
summer/fall. Regular arts and events newsletters will be sent out, and ongoing marketing efforts will continue via the NSBID website and other social media. The NSBID will also continue to liaison and coordinate with other business district organizations, Visit Berkeley, the Chamber of Commerce, and the Buy Local Berkeley Program to promote local business and economic development opportunities in Berkeley. Currently, the North Shattuck Association (NSA) has an active sole source contract with the City in the amount not-to-exceed $548,570 in BID revenues to implement the Management District Plan for the North Shattuck Business Improvement District for the period July 1, 2017 to June 30, 2019 with the option to extend the contract for two additional fiscal years.

ENVIRONMENTAL SUSTAINABILITY
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. The report shall include any proposed changes in the boundaries of the district, the improvements and activities proposed for the year, and an estimate of the cost for providing them. The North Shattuck Association was designated as the Owners’ Association in the Management District Plan for the NSBID. As such, the California Streets and Highways Code Section 36623 requires the City to contract with this designated non-profit corporation to provide these services.

Council action is required to approve the BID’s Annual Report, and its intent to levy assessments. This will, in turn, confirm disbursement of NSBID assessment revenue to the North Shattuck Association provided for in Contract No.10326. 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 briefly considered opting for the allowable 5% increase in assessment rates but instead decided to maintain its existing assessment rate, set in FY 2017, declaring that it sufficiently covers the slate of services outlined in the FY2018 budget and work plan.

CONTACT PERSON
Eleanor Hollander, Economic Development Project Coordinator, Office of Economic Development, (510) 981-7536
Attachments:

1: Resolution: Confirm Annual Report and Levy Annual Assessment
   Exhibit A: NSBID Report for FY 2017 and Proposed Budget for FY 2018
   Exhibit B: North Shattuck BID FY 2018 Assessment Roll
RESOLUTION NO. ##,###-N.S.

APPROVING THE ANNUAL REPORT OF THE NORTH SHATTUCK BUSINESS IMPROVEMENT DISTRICT FOR FISCAL YEAR 2017 AND DECLARING INTENT TO LEVY ASSESSMENTS FOR FISCAL YEAR 2018

WHEREAS, the Property and Business Improvement District (PBID) 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 May 3, 2011 the Berkeley City Council reestablished the North Shattuck Business Improvement District (hereafter, “the District”) for an additional ten year period by Resolution No. 65,265-N.S.; and

WHEREAS, on April 20, 2017 the Board of Directors of the North Shattuck BID adopted the Annual Report to the City of Berkeley FY 2017 (hereafter “Annual Report”) that describes the operations of the District in FY 2017, recommends services for FY 2018 and proposes a budget for FY 2018 (Exhibit A); and

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 2018.

BE IT FURTHER RESOLVED 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 May 3, 2011, when Council renewed the North Shattuck BID through Resolution No. 65,265-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 2018 shall stay the same as the rates established in FY 2017 as allowed by the District Management Plan. Following adoption of this resolution, the City Council may confirm the Annual Report and levy assessments for 2018 and confirm disbursement of NSBID assessment revenue to the North Shattuck Association provided for in Contract No.10326.

Exhibit:
A: Annual Report for FY 2017 and Proposed Budget for FY 2018
B: NSBID Assessment Roll FY 2018
Introduction
The North Shattuck Business Improvement District (NSBID) was reestablished for a new 10-year period by the Berkeley City Council on May 3, 2011 (Resolution No. 61,168-N.S.) under provisions of the State of California Property and Business Improvement District Law of 1994. The NSBID was formed in 2001 to implement a Management District Plan developed to address the specific needs of the District, which encompasses 49 properties located on Vine Street and along Shattuck Avenue from Delaware to Rose Street. The Management District Plan sets forth the projected activities of the NSBID and the allocation of BID assessment revenues to each activity. The Management District Plan can only be changed through a formal process involving notices to all property owners and a public hearing before the City Council. The NSBID has a life of ten years from the date of establishment of the District, and operates on a July through June fiscal year.

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. The report shall include any proposed changes in the boundaries of the district, the improvements and activities for the year, an estimate of the cost of the improvements and activities, the method and basis for levying the assessment, the amount of any surplus or deficit revenues to be carried over from a previous fiscal year and the amount of any contributions from other sources. The City Council may approve the report as filed or may modify any particular contained in the report and then approve it as modified.

This report reviews Fiscal Year 2016-2017 operations, and states goals and objectives for Fiscal Year 2017-2018 of the NSBID, which begins July 1, 2017.

Review of Prior Fiscal Years
In FY2002, the North Shattuck Association, a private 501 (c) (6) non-profit corporation, was formed to manage the NSBID, which had been established with a majority weighted vote of property owners in July 2001. The North Shattuck Association entered into a contract with the City of Berkeley administration of BID revenues, which are collected annually through Alameda County’s property tax collection process and forwarded to the City. The North Shattuck Association began implementation of the approved District Management Plan for economic development organized around business assistance/attraction, marketing/promotions, and maintenance/beautification activities. Operations began late 2002 with the opening a district office, establishment of a 7 member Board of Directors, entering into a contract for regular sidewalk and public space maintenance, and installing 35 new planters and coordinating with the City of Berkeley to place 22 new “Recycliter” cans in the district. In
FY2003, the Association produced public information and marketing materials including a newsletter, website, and business directory. Maintenance and beautification activities included installation of additional landscaped planters, painting of all district area lightpoles, and new rack consolidation. The Association completed a holiday marketing campaign and produced the first annual Spice of Life Festival held in October 2003 to highlight the area’s diverse selection of food, arts, and health and wellness resources. This signature event continued until through 2011, featuring cooking demonstrations by local chefs, gourmet food sampling, wine tasting, yoga and bodywork classes, live music, art activities and artisan booths. Local non-profit organizations and schools, along with area businesses, were highlighted during this event, which grew to draw over 10,000 people to the district.

In FY2004, the Association’s Board was successfully expanded from 7 to 9 members representing properties and businesses throughout the district, and memberships in the Berkeley Chamber of Commerce and Berkeley Convention and Visitors Bureau were initiated. Association staff provided information and assistance to new and existing businesses in the district, including lobbying on behalf of use permits and other needed zoning clearances, and working with the Ecology Center to gain needed approvals to move the North Berkeley Organic Farmer’s Market to a year-round street location at Rose and Shattuck.

During FY2005, a Marketing and Promotions Subcommittee oversaw the design of a new visual brand for the area capitalizing on the strength of the “Gourmet Ghetto” moniker and developed a two-year marketing strategy district to integrate the brand into general and holiday advertising, an area brochure, and the website. The strategy also included hiring a publicist to generate press releases and promote Editorial pieces. The Association participated as a sponsor of the Himalayan Fair, and exhibited at the Solano Stroll and the two-day Live Oak Park Fair, promoting the district’s businesses, events, and website with a raffle and product giveaways.

In FY2006, the Association was active in the Berkeley Business District Network, and became a member of the California Downtown Association, a statewide network of groups focused on economic development and commercial revitalization. Maintenance and beautification activities included the coordination of the design and installation of 19 decorative banners for the North Berkeley Farmers’ Market. The Association continued marketing/promotions activities, including showcasing the area and its new businesses at local festivals, and a series of general ads in local magazines and newspapers. The district was also the focus of several editorial pieces including a one-page feature on the area that appeared in the April 2006 issue of San Francisco Magazine. In late 2006, the district welcomed a host of new businesses including 8 new food related businesses in the new Epicurious Gardens development in the former Dale Sanford building.

During FY2007, the Association extended its decorative banner project to the entire district with a series of banners celebrating ACCI Gallery’s 50th Anniversary. The district organized the North Berkeley ArtWALK as part of the celebration, which showcased ACCI and other local artists whose work was placed in area businesses. The event became an ongoing monthly event highlighting special exhibitions at area galleries, including the Berkeley Art Center and Firehouse North Gallery. The Association also
joined the Berkeley Cultural Trust to promote arts and event development and funding in the city with other district associations and arts organizations. The Association was active in the Berkeley Business District Network (BBDN) participating in BALLE’s national economic sustainability convention held in the city in June 2007, and initiating the Buy Local Berkeley citywide marketing program. 

In FY2008, a survey of business and property owners was conducted to gain input on the direction of the district’s marketing activities. The results guided the Association to organize a weekly culinary/shopping tour for the district featuring area history, interviews with local shopkeepers and chefs, product sampling and a visit to the North Berkeley Organic Farmers’ Market. The survey also indicated support for additional arts related events, and the Director worked with Another Bullwinkle Show to locate and produce the Chocolate and Chalk Art Festival in the North Shattuck district in May 2008 (moving it from Solano Avenue) featuring chocolate sampling and specialty products in area businesses, and a sidewalk chalk art contest.

The Association coordinated with the City on implementation of parking meter timing changes to extend meters along Shattuck to a two-hour maximum time limit and working with the owners of private lots in the area to identify monthly employee parking. The Association provided input and support for Mayor’s Public Commons for Everyone Initiative and changes to existing laws to control inappropriate street behavior and ensure business vitality in the city’s commercial districts, working with local service providers to develop working relationships and strategize on future improvements to social service delivery. The district also assisted businesses with several special events and fundraisers, including a fundraiser for the Berkeley High Development Group at the Cheeseboard, the Cheeseboard 30th Anniversary celebration, and Gregoire’s 5th Anniversary party.

During FY2009, the Association worked with the Berkeley Business District Network (BBDN) on the Buy Local Berkeley campaign, assisting with a Holiday marketing campaign, recruitment of local businesses, ads, marketing materials, and website development. Winter Holiday promotional activities in the NSBID area included extension of holiday lighting to the sidewalk street trees for the entire length of the district, as well as lighting and decorations in median tree locations with electricity access, holiday banners, and musical performances throughout the district on Saturdays and Sundays in December.

The Executive Director attended quarterly meetings with the City Manager and regularly coordinated with City of Berkeley staff to address maintenance issues and to coordinate public improvement projects, including forming a Pedestrian Safety and Transportation Working group with members of the Board of Directors, and AC Transit and City of Berkeley staff to look at potential improvements to parking, pedestrian crossings and bus stops in the area.

The Association received a $1027 City of Berkeley Civic Arts Grant for the Chocolate and Chalk Art Festival, which again featured chocolate sampling and specialty products in area businesses, and a sidewalk chalk art contest. A new festival area was added to the event hosting chocolate and chocolate related vendors and sponsor booths. The Association also partnered on a community art project entitled
“Paving the Way”, which involved area businesses, ACCI Gallery, and the MLK Jr. Middle School community to create and display mosaic art tiles and raise funds for the school. The project paired volunteer artists and MLK art teachers to work with students to create over 100 tile pavers which were auctioned at a fundraising event at the Gallery that raised over $1000 for the school’s art program. The Association continued to produce a monthly Arts and Events guide, moving it to a web-based newsletter format, featuring information about exhibition openings and special events as well as business news and shopping specials.

During FY2010, the Association formed a Stakeholder Group and undertook a selection process for hiring a BID renewal consultant, entering into a contract with New City America to complete the project. They also provided input on the City’s Pedestrian Plan and supported several successful grant applications for a bicycle parking shelter at Vine St. and improvements to the Virginia street crossing at Shattuck under the “Safe Routes to Schools” program to include a beacon light and expanded curbs.

The Association assisted a local artist group, Growing Connections, to secure a mural site at Virginia Bakery, get the Berkeley Foundation for the Arts as a fiscal sponsor, solicit donations for a fundraiser at ACCI Gallery, and provided $1500 in seed funds for the mural which featured a “Slow Food” theme.

The Association worked with the East Bay Style Collective to produce a Food, Wine and Fashion event on Saturday, July 11th on the access street north of Vine. The event featured a runway show with fashions from local boutiques and make-up and hair by the East Bay Style Collective. Food was provided by several district restaurants and local businesses. Another new event, the “Taste of North Berkeley” restaurant walk was held in early spring with the Berkeley Lion’s Club to benefit their community fund. The event involved over 25 businesses and restaurants who offered tastes of their cuisine and wine tasting. The event was a sell-out, bringing over 500 people into the district, and raised over $9,000 for the non-profit.

In FY 2011, the Association worked with BID renewal consultant New City America to successfully complete a petition drive and formal balloting for the project. The BID passed in May 2011 for another 10-year cycle with an 83.52% weighted majority vote. Assessment rates and formulas remained at the levels specified in the original 2001 Management Plan. Allocations to the program elements were changed slightly, with a reduction of 10% into Maintenance/Beautification budget which was redirected to increase the Marketing/Promotions and Organization/Administration program elements budgets by 5% each.

During this year, the Association provided input on proposed zoning amendments for the C-2 and NS-1 commercial districts governing the area including lifting limitations on medical offices, gyms, and dance uses on ground floors, provisions for exceeding use quotas, and regulations regarding amplified music in commercial establishments. The Association also participated in meetings between area businesses and property owners and the Safeway staff and project architects regarding their proposed remodel of the Shattuck store, providing input and support for the project through the City review process. The Board of Directors and AC Transit and City of Berkeley staff continued to meet to discuss
improvements to parking, pedestrian crossings and bus stops in the area.

During the spring, the Association worked with area businesses, various City Departments and Councilmember Capitelli to gain approval for a weekly gourmet mobile food market in the district. “Off the Grid North Berkeley” had its kick-off in early June 2011 and garnered extensive media coverage in the lead up to the start date including various food bloggers, daily and weekly newspapers, and a national TV spot on the NBC Morning Show.

During FY 2012, “Off the Grid North Berkeley” hosted a number of area eateries in a rental food truck and their participation was part of the Association’s marketing efforts around the event, along with tie-ins to local business offerings of food and drink specials, music, and art exhibits to draw event patrons into the wider area. The event continued in the area until December 2012, until it was decided to end operations because of parking concerns. The Association sponsored several art-related projects in FY2012, including a community art project entitled “Take 5: Art Break Day” held simultaneously on September 2nd, 2011 in five cities in the Bay Area. The district provided funding and hosted an art-making station at the corner of Vine and Shattuck where the public was invited to take a break and make art.

Working with LocalOn, a website update was started using their platform that allows for business listing personalization and automated social media links. The Association developed a social media presence on Facebook and Twitter, produced an updated Shopping and Dining guide/map, placed ads in the Visit Berkeley and Chamber of Commerce guides, Eco-Metro Guide, and numerous local papers highlighting events, and provided information for editorial pieces on the district.

The Association worked with elected official and City of Berkeley staff on developing a Pilot Parklets Program based on the success of the parklets created during Spice of Life Festival and on Parking Day. A group of merchants and local residents started meeting toward the creation of parklets in parking spaces at several locations to provide additional seating and bicycle facilities in the district.

During FY 2013, the Executive Director met with and made presentations to various City Commissions, community groups and the Board of Realtors about proposed City and Association sponsored public improvement projects in the district, including the grant funded bicycle parking shelter at Vine St. and improvements to the Virginia street crossing at Shattuck under the “Safe Routes to Schools” program. A plan for reconfiguration to diagonal spaces near Rose St. to create 10 more parking spaces, and the proposed parklets projects were also detailed. The Association coordinated with local businesses and the City on the installation of the grant funded bicycle shelter at Vine St. and Shattuck in April 2013.

The Association continued to work with interested businesses and local designers on a “parklets” program to provide additional seating and bicycle facilities. Meetings were held with City Departments to discuss program elements in San Francisco and Oakland and advocate for development a City program. The parklets group designed an online survey, worked with businesses and designers to develop conceptual plans for projects near interested businesses, and coordinated the placement of a
demonstration parklet constructed by a local designer in the parking bay in front of Philz Coffee during Sunday Streets. The Association agreed to provide seed funds for the projects and help coordinate permitting and construction.

The Executive Director worked with the Berkeley Arts Magnet Elementary school to fundraise for short-term improvement projects and a longer-term schoolyard remodel to incorporate outdoor learning areas. The Association coordinated merchant donations of supplies and refreshments for community work days and organized meetings to connect the PTA and BAM school administrators with the Foundation for Youth Initiatives, a non-profit funding organization, for longer term projects.

On October 17th, 2012 the Association partnered with Livable Berkeley and the Downtown Berkeley Association to produce the first Sunday Streets Berkeley, open-streets event, in lieu of the Spice of Life Festival. The event closed Shattuck from Rose to Haste Street with health and environmental activities by local organizations and businesses, and community group and non-profit information booths. No outside commercial vendors are allowed in the event, which instead features the businesses along the route. District businesses participated with outdoor yoga classes, special art exhibits and activities, sidewalk sales, etc. and restaurants brought seating into the streets. The Association brought out umbrellas and tables for restaurant use, and also produced a companion event was held on Vine Street, which was closed from Shattuck to Walnut St. to create a picnic area and beer/wine garden hosted by the Vintage Berkeley wine shop.

Winter Holiday 2012 promotional activities included installation of holiday lighting in the street trees, holiday banners, ads in the Express and Chronicle newspapers, online promotion through e-blasts and Facebook, and musical performances throughout the district on Saturdays and Sundays in December. The 3rd “Snow Day in Berkeley” was held on Sunday, December 2. Other local businesses had related events that day, including M. Lowe and Co.’s “Find the Ice in the Snowball” school fundraiser and Saul’s annual Latke Party. The district also participated in the Buy Local Berkeley Holiday Campaign which featured a free holiday mobile phone coupon application developed with Chinook Book offering discounts at independent businesses. The application was marketed to their 15,000 mobile app users and to the public through ads, posters, and banners promoting the mobile app and encouraging holiday shopping at locally-owned small businesses.

With the Berkeley Lion’s Club, the Association again produced a Spring “Taste of North Berkeley” on the evening of May 7th with event proceeds benefitting local charities through the Lions Community Fund, and the Chocolate and Chalk Art Festival in June, with chocolate sampling and specialty products in area businesses, a sidewalk chalk art contest, a festival area with crafts, chocolate and chocolate related vendors, music, circus arts performers, and face painting, and other kid’s activities.

During FY2014, The Association took a lead role in advocating for the City’s Parklets Pilot Program, designing an online survey for community input, meeting with City Departments to discuss program elements and requirements, and supporting and providing input at the Commission and Council level. The Association provided seed finding to the Cheese Board for engineering review of their design, and
worked with Philz Coffee/Guerilla Café on revising their design and initiating a crowd-funding program to raise funds for construction. The Executive Director coordinated with the City and nearby businesses on construction issues during improvements to the Virginia street crossing at Shattuck under the “Safe Routes to Schools” program, and assisted with the sidewalk seating permit and planter placement on the newly constructed bulb-out area created by the project. Other public improvements included a BID sponsored artist-designed “wrap” for the utility box at Vine and Shattuck and completion of the BID-funded reconfiguration of parking from parallel to angled in the area near Rose St. resulting in the creation of 10 new spaces including a new handicapped space with adjacent sidewalk ramp, and design and installation of new decorative lightpole banners reflecting the unique aspects of the district.

The Association provided support to the Berkeley Public Schools Cooking and Gardening Program by promoting their Berkeley Dine Out event and coordinating a Fall 2013 Taste of North Berkeley restaurant event to raise funds and awareness for the program. The Association again partnered with Livable Berkeley and the Downtown Berkeley Association to produce Sunday Streets Berkeley in October 2014, which drew over 30,000 people to Shattuck Ave. in the district and downtown. Other annual events included the Chocolate and Chalk Art Festival, the Dia de los Muertos festival and candlelight procession in October, and Snow Day in December.

Also in FY2014, the Executive Director organized training sessions for merchants on utilizing the new website platform for social media, hosted presentations by organizations for loyalty programs and other business products at general membership meetings, and coordinated district participation in the Buy Local Berkeley Holiday Campaign which featured a free holiday mobile phone coupon application developed with Chinook Book.

In FY2015, the Association assisted the Cheese Board Collective to complete the first parklet project under the approved Parklets Pilot Program, and worked with businesses and local designers on the two other parklet projects underway which will provide additional public seating and bicycle facilities for the district. A demonstration parklet and fundraiser at the parklet site in front of Philz Coffee and Guerilla Café was held on Park-ing Day in September 2014 and a crowd-funding campaign was organized to raise funds for construction with gifts from local businesses. The design was revised to include a grant-funded bike “corral” which was installed by the City in April. The Association also provided seed finding to Saul’s for permit fees for their application, and handled notifications of nearby business and property owners for the project.

The Association helped organize a new entity, East Bay Open Streets, to produce Sunday Streets Berkeley in October 2015, under the auspices of the non-profit Walk Oakland Bike Oakland (WOBO). District businesses participated with outdoor yoga classes, special art exhibits and activities, sidewalk sales, etc. and restaurants brought seating into the streets. A pop-up art gallery was established in the vacant Black Oak Books space and the Association again produced the companion Vine Street Block Party event, which created a picnic area and beer/wine garden hosted by the Vintage Berkeley wine shop along with business and artisan crafts booths.

7
Other special events in this fiscal year included the Dia de los Muertos festival and candlelight procession on November 2, and “Snow Day in Berkeley” in early December as a kick off to the holiday shopping season and promotional activities. The annual Valentine’s Wine Walk paired local wineries with shops and galleries for an evening of shopping and wine tasting as a fundraiser for the Berkeley Public School Gardening and Cooking Program. With the Berkeley Lion’s Club, the Association again produced the “Taste of North Berkeley” in early May.

The Association provided market and support to new businesses opening in the area this year including Kamado Sushi and a UPS Store in the 1400 Shattuck building, Tiger Lily in Epicurious Garden, Mission Heirloom Garden Café on Vine St., and Books Inc., which relocated from 4th St. to the former Black Oak Books site.

During FY2016, the Association worked with Saul’s Deli to complete a second parklet project in front of their business under the approved Parklets Pilot Program coordinating the city permitting process and business and property owner notifications. The Executive Director also worked with City staff, nearby businesses and the Ecology Center’s market managers on the reconfiguration of the North Berkeley Farmers Market into the service road, including merchant relations, organization of a grand re-opening event, parking signage, and operational issues.

The Association produced both annual special events including Sunday Streets Berkeley, the Dia de los Muertos festival, Snow Day, the Valentines Wine Walk, Taste of North Berkeley, as well as coordinating and marketing the weekly Farmers Market and Gourmet Ghetto Culinary Tour. The Association also assisted Andronico’s to organize a “Fit Faire” at their Shattuck store in August which featured classes and bodywork demonstrations by neighborhood practitioners.

The Association continued marketing and promotion of area businesses through regular e-newsletters, website, and a robust social media presence, adding an Instagram account to our Facebook and Twitter marketing platforms. The Executive Director also worked with Buy Local Berkeley Program to leverage their media presence for our businesses and events, and to promote shopping at local independent businesses through the Small Business Saturday and the citywide Holiday marketing campaign.

Throughout the year, the Association coordinated area cleaning and maintenance of our landscaped planters, and worked with city departments on major sewer replacement projects, tree trimming, and other sidewalk and street issues. The Executive Director also worked with merchants, property owners, BPD, and homeless service providers to address trespassing and illegal dumping issues on private property and sleeping during the day in the public right of way.

**Fiscal Year 2017 Summary**

**Budget**

The budget for Fiscal Year 2017 included an approved 5% increase in the BID assessments which resulted in new revenue of $174,010. The following table shows the carryforward deficit from FY 2016,
the 2017 Budget Allocations by category and percentages as well as the estimated expenditures to June 30, 2017.

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<th>NORTH SHATTUCK ASSOCIATION Service/Expense Category</th>
<th>Allowable % of Annual Budget</th>
<th>Carry Forward to Fiscal Year 2017 (Actual)</th>
<th>Actual Fiscal Year 2017 Assessment Revenue</th>
<th>2017 Budget with Carry Forward &amp; New Revenue</th>
<th>Fiscal Year 2017 Expenditures (Estimated to 6/30/17)</th>
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<td>Maintenance/Beautification</td>
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Accomplishments
During Fiscal Year 2017, the North Shattuck Association has 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 Association. Activities of the district are organized around Organization/Administration, Marketing and Promotion, Beautification and Design, and Economic Development. Accomplishments in each area are summarized below.

Organization/Administration
- The Association maintained a district office to facilitate ongoing communications with businesses and provide on-site supervision of contractors and district operations.
- Meetings of the Board of Directors and General Association meetings with merchants, property owners, and community members were held regularly during the year to further the goals and objectives of the Association as set forth in the District Management Plan.
- The Executive Director was active on the Buy Local Berkeley Executive Committee and the Association continued its involvement with the Berkeley Business District Network (BBDN), the Berkeley Chamber of Commerce, and Visit Berkeley.
- The Executive Director met with and made presentations to various City Departments, Commissions, and the City Manager regarding business issues and public improvement projects in the district, including sidewalk maintenance and parklet projects.
- Coordinated meetings of merchants, property owners, BPD, and homeless service providers as needed to deal with trespassing and illegal dumping issues on private property and sleeping during the day in the public right of way.
- The Association again sponsored a free art-making station at the corner of Vine and Shattuck for the Art is Moving “Take 5: Art Break Day”, a community art project held in September 2016.
- The Executive Director worked with City staff, nearby businesses and the Ecology Center’s market managers on operation of the North Berkeley Farmers Market in the service road, and
instituted a new monthly event from May to September with a beer & wine Garden hosted by Saul’s, chef demo tent by Kitchen on Fire and other business info and activity tables.

- Provided a donation and support to the Martin Luther King Middle School PTA as our project partner for the March 2017 Wine Walk event.
- The Association coordinated donations to various schools and organizations throughout the year, including the Cooking and Gardening Program of BUSD and Berkeley Rose School.

**Maintenance and Beautification**

- The Association provided funding and oversight for a regular maintenance program for sidewalks, public spaces, and public property including sidewalk and gutter sweeping, weeding of tree wells, and maintenance of over 150 landscaped ceramic planters at sites throughout the District.
- The Executive Director attended quarterly meetings with the City Manager and regularly coordinated with City of Berkeley staff to address maintenance issues including street tree replacements, graffiti abatement, sidewalk repair, trash receptacle maintenance and sewer and street repair projects.
- Continued to assist owners and neighbors with vacant property and lot maintenance, trespassing issues and illegal dumping.
- Holiday lighting was installed 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.

**Marketing and Promotion**

- Developed and implemented a new monthly event at the Farmers Market to raise awareness for the market along with local merchants. “Thirsty Third Thursdays” took place June through September 2016 with a beer & wine garden hosted by Saul’s, a cooking demo tent staffed by Kitchen on Fire, and various local business tableting and activities.
- Produced Sunday Streets Berkeley in October 2016 with East Bay Open Streets, along with a companion Vine Street Block Party event, which created a picnic area and beer/wine garden hosted by the Vintage Berkeley wine shop along with business and artisan crafts booths. The event drew over 30,000 people to Shattuck Ave. in the district and downtown to bike, walk, skate and play in the car-free street.
- Winter Holiday 2016 promotional activities included the “Snow Day in Berkeley” event in early December with activities including visits with the Snow Queen, a mound of snow for play, arts and crafts activities, and several vendors. Holiday promotions included posters, postcards, ads in the Express and Chronicle newspapers, online promotion through e-blasts and Facebook, and a video gift guide featuring small business in the district.
- The district participated in the Buy Local Berkeley Holiday Campaign which featured a free holiday mobile phone coupon application developed with Chinook Book offering discounts at independent businesses along with ads, posters, and banners promoting the mobile app and encouraging the public to shop at locally owned small businesses for the holidays. 15 district businesses placed offers in the app, which marketed to their 35,000 mobile app users.
- The Gourmet Ghetto Wine Walk was moved to March in 2017 and again paired local wineries
with shops and galleries for an evening of shopping and wine tasting in. 24 businesses participated in the event, which was a fundraiser for the Martin Luther King Middle School PTA.

- The Association produced the 8th annual “Taste of North Berkeley” on the evening of May 9th with the Berkeley Lion’s Club. The event included 20 businesses and restaurants who offered tastes of their cuisine and local product tasting. The event sold out with over 400 attendees, with all proceeds benefitting local charities through the Lions Community Fund, including Berkeley Food and Housing and the Women’s Daytime Drop-in Center.

- The Association continued to produce a monthly Arts and Events e-newsletter and did regular Facebook posts featuring our local galleries’ monthly exhibition openings and artist receptions, information about business openings/events, and special events in the district and at nearby venues, including the Jewish Community Center, Theatre First, Berkeley Art Center, and the Hillside Club.

- Exhibited throughout the year at events including the North Berkeley Farmers Market, and the annual Solano Stroll to promote the district’s businesses, events, and website with marketing materials, raffles, and product giveaways.

- Updated the district website regularly with new business information and links to events, classes, and gallery openings in the district. Utilized the specialized format that allows for automatic posting of events and business news to our site, Facebook page, and Twitter, and held Social Media workshops for district businesses to teach them how to integrate the site tools into their marketing plans.

- The Association worked with the East Bay Express to produce the Shattuck Street Guide, a district shopping and dining guide to be distributed to Visit Berkeley, local hotels, UC Berkeley Faculty, and Culinary Tour attendees, etc. Produced press releases, placed ads in the Visit Berkeley and Chamber of Commerce guides, the Chinook Book sustainable business guide, and numerous local papers highlighting events, and provided information for editorial pieces on the district.

Economic Development

- The Association continued to maintain an inventory of all businesses and vacant retail and office space in the district, including square footage, lease rates, and broker contact information. The director provided information to the City’s Economic Development office and conducted site visits of the district and vacant properties for prospective new businesses.

- Provided information and assistance to new and existing businesses in the district, including marketing, lobbying on behalf of use permits, sidewalk encroachment permits, and other needed planning and zoning clearances.

- Organized training sessions for merchants on utilizing the new website platform for social media, and hosted presentations by organizations for loyalty programs and other business products.

- The Association entered into a partnership with the online business community platform, Townsquared.com, to connect businesses and enact a “Merchant Alert” system through text messaging.

- The Executive Director continued to work with the Berkeley Business District Network (BBDN)
on various issues related to economic development in the district and was active on the Buy Local Berkeley citywide marketing campaign's Executive Committee, helping to direct the holiday and social marketing campaigns, and negotiate membership benefits with local media.

- The Executive Director worked with City staff, nearby businesses and the Ecology Center's market managers on operations and parking issues for the North Berkeley Farmers Market and integrated local businesses into the event through the Thirsty Thursdays monthly event.
- The district provided market and support to new businesses opening in the area this year including Agrodolce Osteria, Berkeley Running Company, Spokes Bike Shop, Safeway Community Market, and Guacamole 61 in the Epicurious Garden food hall.

**Fiscal Year 2018**

**Work Plan**

The North Shattuck Association will continue implementation of the activities initiated in previous fiscal years as outlined in the Management District Plan. Funds not expended in previous years will again be carried forward in addition to estimated Fiscal Year 2018 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 2018 are organized as follows:

**Organization/Administration**

**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, present testimony at meetings as needed.

5) Coordinate Board elections in July-August 2018 including nominations and property owner balloting.

6) Liaison with property owners, merchants, City of Berkeley, Chamber of Commerce, Visit Berkeley, Buy Local Berkeley, the Berkeley Business District Network, Berkeley Cultural Trust, Event Producers Group, the Restaurant Action Group, local schools, and neighborhood groups.

7) Develop and distribute quarterly e-mail newsletter to merchants and neighborhood groups with service accomplishments, event information, issue updates, and new business contacts. Continue to connect with outside groups and promote activities through various social media.

8) Continue 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.

9) 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 pedestrian safety, improved bike facilities, and parking.

10) Coordinate participants, volunteers and business sponsors for community events, activities, and fundraisers, and other special events by local schools and organizations.

11) Work with the Berkeley Public Education Foundation, local schools, the Berkeley Business District Network, and Buy Local Berkeley to strategize on additional fundraising events to provide funding for school art and gardening programs.

Marketing and Promotion

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.

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, healthy living, and the 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) Market the district to hospitality industry and regional/national/international audiences working with Visit Berkeley through editorial placements, the shopping/dining guide, and promotion of special events and the weekly Farmers’ Market and Culinary Tour.

6) 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.

7) Coordinate and promote a 2017 series of monthly “Market Days” to coincide with the Farmers Market and the Thirsty Thursdays event with activities throughout the district including local galleries and restaurants, and retailers.

8) Work with East Bay Open Streets and the Downtown Berkeley Association to produce a Sunday Streets event in August 2017, and work to integrate a revived Chocolate & Chalk Art Festival into the north end of the event. Manage district sponsorships, merchant activities, notifications and promotion.

9) Organize promotional events at the winter holidays including musical performances, “Snow Day in Berkeley” and other neighborhood celebrations.

10) Identify a public school partner and produce a 2018 Wine Walk fundraiser event, coordinating wineries, business participation, and marketing.
11) Work with the Lion’s Club to produce the “Taste of North Berkeley” restaurant walk in spring 2018 to benefit local charities and highlight neighborhood restaurants.

12) Continue to work with the Buy Local Berkeley program on its marketing program and membership benefits package for the district’s independent businesses.

13) Organize Association booths/tables at the weekly Farmers’ Market and other fairs and festivals such as the Solano Stroll to promote the district.

14) 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.

15) Coordinate business participation in the planned September 2018 Berkeley Photography Festival.

**Beautification and Design**

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

*Objectives:*

1) Provide ongoing maintenance monitoring, needs assessment, and coordination with appropriate city departments and contractors on projects including bicycle racks/facilities placement, street tree replacements and median landscaping as needed.

2) Oversee Peralta Service Corporation services in completing regular sidewalk cleaning and special projects as needed.

3) Work with property owners and appropriate city departments to address signage conditions and the appearance of empty storefronts and vacant properties in the district.

4) Oversee installation of annual winter holiday street tree lighting throughout the district.

5) Work with appropriate City departments, interested business and property owners, contractors, and volunteers to complete a third parklet project in the district through the City’s Parklets Program.

6) Work with ACCI Gallery, artists, and local schools on projects in the district including rotating storefront exhibits, art projects, temporary mural projects, etc.

**Economic Development**

*Goals:* Business retention and recruitment; business education; address issues related to security, parking, and transportation improvements.

*Objectives:*

1) Maintain inventory and lease information for vacant retail and office space in the District, zoning regulations/amendments, available use permits, and status of the retail and food use quotas in the northern part of the district.

2) Liaison with City and commercial brokers to attract and assist new businesses.

3) Serve on the Chamber of Commerce’s Governmental Affairs and Board of Directors (ex-officio) to provide input on business district issues.

4) Identify and address security and safety issues working with the Berkeley Police Department. Organize meetings of district businesses with patrol officers including walk-throughs and at general meetings, etc.
5) Continue to work on parking issues in the district including meter timing, improved usage of existing private parking resources, and identification of spaces in private lots for paid employee parking.

6) Work with the City and Ecology Center on issues related to the Farmers Market operations.

7) Identify opportunities for better utilization of public transportation resources in the district and financing and operation options for alternative transportation including shuttles.

8) Continue to work with the Chamber of Commerce and the Berkeley Restaurant Action Group on issues related to alcohol service controls, minimum wage, and other issues.

9) Identify and act on any business education/assistance needs for business retention.

10) Continue working with Townsquared to develop a business to business network for joint marketing, referrals, and security.

**Budget**

BID collections for Fiscal Year 2018 are estimated to be $174,500 plus a projected carryforward of $90 from Fiscal Year 2017 for a total estimated budget of $174,590. BID assessment revenues will be spent in accordance with the Management District Plan as follows:

<table>
<thead>
<tr>
<th>NORTH SHATTUCK ASSOCIATION Service/Expense Category</th>
<th>Projected Fiscal Year 2017 Carry Forward</th>
<th>Fiscal Year 2018 Projected Revenues</th>
<th>Allowable % of Annual Budget</th>
<th>Estimated Total Fiscal Year 2018 Budget</th>
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<tr>
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<td>40%</td>
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<tr>
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<tr>
<td>Total Estimated Budget</td>
<td>$90</td>
<td>$174,500</td>
<td>100%</td>
<td>$174,590</td>
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</table>

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 are proposed in the boundaries of the district or the method and basis for levying the BID assessments. A listing of Fiscal Year 2018 assessments is attached as Exhibit A to this report. The formula for property assessment is attached as Exhibit B to this report.

Approved by:

[Signature]

Approved by the Board of Directors

Cathy Goldsmith, President, North Shattuck Association

On April 20, 2017

Prepared by: Heather E. Hensley, Executive Director, North Shattuck Association
<table>
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<th>APN</th>
<th>Owner Name</th>
<th>Site Address</th>
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Note: Data for APN, Owner and Land Use from the City's Land Management System is current as of December 31, 2015.
Updated data from the County current as of December 31, 2016, will be available in July 2017.