CONSENT CALENDAR
May 28, 2019

To:          Honorable Mayor and Members of the City Council
From:        Dee Williams-Ridley, City Manager
Submitted by: Jordan Klein, 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 FY 2019 and proposed budget for FY 2020, and declaring Council’s intention to levy an annual assessment for the NSBID for FY 2020.

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.). 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 May of 2016, the City Council authorized the City Manager to execute a contract and any amendments with the North Shattuck Association, not to exceed $548,570 of BID revenues, to implement the North Shattuck Management District Plan for the period July 1, 2017 to June 30, 2019, with the option to extend the contract for two additional years (Contract No. 10326). Staff will implement that extension, increasing the contract’s total amount to $961,521. The contract, with the exercised options, will cover the years remaining in the current term of the NSBID establishment.

NSBID assessments are projected and budgeted at approximately $182,647 in FY 2020. 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. These totals reflect a 5% assessment increase for inflation as allowed by the Management District Plan and approved by a majority of the North Shattuck Association’s Board of Directors on March 21, 2019. 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 21, 2019 to review and approve the attached Annual Report for the NSBID for FY 2019 (Exhibit A). The report includes a budget for improvements and activities for FY 2020 and an estimated cost for providing them. The report also recommends that the assessments for FY 2020 be levied on the same basis and method, and within the same boundaries, as they were levied for FY 2019 with a 5% fee increase. See Exhibit B: North Shattuck BID FY 2020 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 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. Thus the NSBID is authorized through 2021 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 above 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 a framework and budget for the NSBID’s activities. In FY 2020, 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 Telegraph Business Improvement District and 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 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
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 not opting for the allowable 5% increase in assessment rates but instead decided to levy the full 5% increase in the assessment rate, declaring that the increase would be necessary to sufficiently cover the services outlined in the FY2020 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 2019 and Proposed Budget for FY 2020
   Exhibit B: North Shattuck BID FY 2020 Assessment Roll
RESOLUTION NO. ##.###-N.S.

APPROVING THE ANNUAL REPORT OF THE NORTH SHATTUCK BUSINESS IMPROVEMENT DISTRICT FOR FISCAL YEAR 2019 AND DECLARING INTENT TO LEVY ASSESSMENTS FOR FISCAL YEAR 2020

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 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 March 21, 2019 the Board of Directors of the North Shattuck BID adopted the Annual Report to the City of Berkeley FY 2019 (hereafter “Annual Report”) that describes the operations of the District in FY 2019, recommends services for FY 2020 and proposes a budget for FY 2020 (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 2020.

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 2020 shall increase by 5% from the rates established in FY 2019 as allowed by the District Management Plan. Following adoption of this resolution, the City Council may confirm the Annual Report and levy assessments for 2020 and confirm disbursement of NSBID assessment revenue to the North Shattuck Association provided for in Contract No.10326.

Exhibit:
A: Annual Report for FY 2019 and Proposed Budget for FY 2020
B: NSBID Assessment Roll FY 2020
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 section contained in the report and then approve it as modified.

This report reviews Fiscal Year 2018-2019 operations, and states goals and objectives for Fiscal Year 2019-2020 of the NSBID, which begins July 1, 2019.

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 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 light poles, 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 Bullwinkel 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 $1,027 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. In 2010, 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.

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.

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 marketing 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 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 also produced annual special events including Sunday Streets Berkeley, the Dia de los Muertos festival, Snow Day, the Valentines Wine Walk, and the Taste of North Berkeley.

During the 2017 Fiscal Year, the Association continued marketing and promotion of area businesses through regular e-newsletters, social media, and events, and 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. The Association also worked with the Ecology Center to organize a series of monthly events during the summer of 2016 at the Farmers Market called “Thirsty Third Thursdays” which included a beer/wine garden hosted by Saul’s Deli and business information tables. 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. The Association also again promoted participating area businesses for Berkeley Restaurant Week in conjunction with Visit Berkeley.

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 district hosted Gig Car Share to discuss the roll out of their program in Berkeley, and Bay Area Bike Share to discuss their East Bay bike share network and stations planned for the district. 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.

The district provided marketing and support to several new businesses opening during the fiscal year including AgroDolce Osteria, Berkeley Running Company, Spokes Bike Shop, Safeway Community Market, and Guacamole 61 in the Epicurious Garden food hall.

In Fiscal Year 2018, the Association coordinated a larger Sunday Streets Berkeley event including Telegraph Ave. as well as downtown and North Berkeley. The event had to be rescheduled due to poor air quality from the North bay wildfires from Oct. 2017 to June 2018. Working with businesses and property owners, two Bay Area Bike Share stations were installed in the district, on Vine St. at Mission Heirloom and on Virginia below Shattuck Ave.
Winter Holiday 2017 promotional activities included the “Snow Day in Berkeley” event in early December, participation in the national Small Business Saturday local shopping promotion which provides a marketing kit with tote bags, signage, doormats, and banners that were featured at a district event hosted by M. Lowe & Co. with music and giveaways, and the Saul’s Deli Latke Party, which ran two weekends with fresh latkes prepared in a tent adjacent to the parklet with beer, wine and live music. The district also participated in the Buy Local Berkeley Holiday Campaign which again featured a free holiday mobile phone shopping application developed with Chinook Book supported by gift guide e-blasts, ads, posters, and banners encouraging the public to shop at locally owned small businesses for the holidays. The Gourmet Ghetto Wine Walk was held in March 2018, pairing local and North Bay wineries with a portion of the proceeds benefitting the wildfire relief fund at Habitat for Humanity of Sonoma County.

The Executive Director continued working with the Berkeley Business District Network (BBDN) on various issues related to economic development in the district, providing input on the Small Business Support package of planning and zoning changes, and installation of digital information kiosks. The district provided market and support to new businesses opening in the area this year including Vitality Bowl, Peter Engel Architecture, and Heart Source Center.

Fiscal Year 2019 Summary

**Budget**

The budget for Fiscal Year 2019 included BID assessments which resulted in new revenue of $173,950 slightly lower than projected, and the following table shows the carryforward/deficit from FY 2018, the 2019 Budget Allocations by category and percentages as well as the estimated expenditures to June 30, 2019.

<table>
<thead>
<tr>
<th>NORTH SHATTUCK ASSOCIATION Service/Expense Category</th>
<th>Allowable % of Annual Budget</th>
<th>Carry Forward from Fiscal Year 2018 (Actual)</th>
<th>Actual Fiscal Year 2019 Assessment Revenue</th>
<th>2019 Budget with Carry Forward &amp; New Revenue</th>
<th>Fiscal Year 2019 Expenditures (Estimated to 6/30/19)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintenance/Beautification</td>
<td>40%</td>
<td>$(88)</td>
<td>$69,580</td>
<td>$69,492</td>
<td>$69,218</td>
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<tr>
<td>Marketing/Promotion</td>
<td>25%</td>
<td>$1,031</td>
<td>$43,488</td>
<td>$44,519</td>
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<td>Organization/Administration</td>
<td>30%</td>
<td>$(1436)</td>
<td>$52,185</td>
<td>$50,749</td>
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<td>$1</td>
<td>$8,697</td>
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<td>Total Budget</td>
<td>100%</td>
<td>$(492)</td>
<td>$173,950</td>
<td>$173,458</td>
<td>$172,246</td>
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Accomplishments
During Fiscal Year 2019, the North Shattuck Association continued implementation of the activities and services outlined in the Management District Plan. 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
- 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 meeting 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 Association continued its involvement with the Berkeley Chamber of Commerce, Visit Berkeley, and the Berkeley Business District Network (BBDN) with the Executive Director attending its quarterly meetings with the City Manager to deal with citywide issues, and providing input on the City’s Small Business Support package.
- Worked with Board and merchants to analyze designs and locations for the IKE digital kiosks in the district. Supported this Visit Berkeley initiated program at City Council.
- Disseminated information on the Disposable-Free Dining Ordinance put forth by The Ecology Center to eateries in the district for comment and provided support for approval to City Council.
- Coordinated meetings of merchants, property owners, BPD, and the City’s new HOTT team to deal with mental and homeless issues, trespassing and illegal dumping issues on private property and sleeping during the day in the public right of way.
- Coordinated with the City and the non-profit Streets Team to start a volunteer Streets Team clean-up crew to assist with area clean-up.
- Coordinated presentations by Project Equity and Uptima Business Bootcamp, the new business assistance and succession planning consultants under contract with the City of Berkeley to area merchants at the April 2019 General Association meeting.
- Organized the annual free art-making station at the corner of Vine and Shattuck for the Art is Moving “Take 5: Art Break Day”, a national community art project in September 2018.
- The Executive Director worked with City staff, nearby businesses and the Ecology Center’s market managers on operation and promotion enhancements for the North Berkeley Farmers Market, including the Thirsty Third Thursday summer events.
- Coordinated partnership with The Berkeley Public Schools Fund for the spring 2019 Gourmet Ghetto Wine Walk and Taste of North Berkeley events.
- Served as the fiscal agent for the Sunday Streets Berkeley event and coordinated recruitment of sponsors and activity leaders for the June 2019 event.

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.

- Coordinated with the City and the non-profit Streets Team to start a volunteer Streets Team clean-up crew to assist with area clean-up for a few hours each week.
- 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 steam cleaning and 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.
- Worked with Councilmember Hahn to develop strategy and identify funding for median improvements to be coordinated with planned roadway resurfacing along Shattuck Ave.

Marketing and Promotion

- Winter Holiday 2018 promotional activities included the “Snow Day in Berkeley” event in early December, and the Saul’s Deli Latke Party, which ran two weekends with fresh latkes prepared in a tent adjacent to the parklet with beer, wine and live music. The district supported these events and business promotions with digital ads on Berkeleyside.com and eastbayexpress.com, in the Express Gift Guide edition, and online promotion through e-blasts and social media.
- Organized the Gourmet Ghetto Wine Walk in April 2019, pairing local and wineries and artisan food producers with area shops for an evening of shopping and wine tasting in area businesses, and the 10th annual “Taste of North Berkeley” in May 2019, both as fundraisers for The Berkeley Public Schools Fund, which provides classroom grants to teacher across the city.
- Coordinated the Sunday Streets Berkeley event in June 2019. Organized the district’s activities, including the Cheese Board Collective’s 50th anniversary activities and music, a cooking demo tent, a bike rodeo, etc. and the Vine Street Block Party event, which creates a picnic area and beer/wine garden hosted by the Vintage Berkeley wine shop along with business and artisan crafts booths.
- Worked with the Ecology Center to organize and promote another series of “Thirsty Third Thursdays” which took place monthly from June through October 2018 with a beer & wine garden hosted by Saul’s, a cooking demo tent staffed by Kitchen on Fire, and various local business tabling and activities.
- Coordinated the 2018 Chocolate & Chalk Art Festival in August, including outreach to businesses for participation in chocolate tasting aspect of the event, organization of an association festival booth, a beer and wine garden on Vine St. and judging of the Chalk Art contest.
- The Association promoted participating area businesses for Berkeley Restaurant Week in conjunction with Visit Berkeley, with ACCI Gallery hosting for the kick-off party.
- 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.
- Continued development of a new district website with a searchable business directory and links to events, classes, and information about district activities.
- 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 General Meetings with presentations on City programs and initiatives, organizations providing loyalty programs and other business products, and training sessions and for merchants on alternative loan programs, green business certifications, best practices for social media, etc.
- The Executive Director continued to work with the Berkeley Business District Network (BBDN) on various issues related to economic development in the district, providing input on the Small Business Support package of planning and zoning changes.
- The Association provided market and support to new businesses and new owners in the area this year including Left Margin Lit, Poulet, and Wrecking Ball Coffee.

**Fiscal Year 2020 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 2020 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 2020 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 August 2019 including nominations and property owner balloting.
6) Liaison with property owners, merchants, City of Berkeley, Chamber of Commerce, Visit Berkeley, Berkeley Cultural Trust, Event Producers 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 including the Small Business Support package. 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) Work with City on roadway repaving project and seek funds through the UC Berkeley Chancellor’s Grant for median improvements as part of the improvement program.
11) Prepare funding application for Sunday Streets event through the City’s Festival Grant program.
12) Coordinate participants, volunteers and business sponsors for community events, activities, and fundraisers, and other special events by local schools and organizations.
13) Work with the Berkeley Public Education Foundation, local schools and the Berkeley Business District Network, strategize on additional fundraising events to provide funding for classroom grants, for theater, science, art and gardening programs.
14) Prepare for renewal of the North Shattuck BID by June 30, 2021. Hire renewal consultant, connect with new property owners and key stakeholders.

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) Work to produce a Sunday Streets event in July/August 2019. Manage district sponsorships, merchant activities, notifications and promotion. Prepare application to City’s new festival grants program forFY2020/21 funding of the event.

8) Coordinate and promote summer 2019 monthly “Market Days” to coincide with the Farmers Market and the Thirsty Third Thursdays event with activities throughout the district including local galleries and restaurants, and retailers.

9) Coordinate the 2019 Chocolate & Chalk Art Festival in August, including outreach to businesses for participation in chocolate tasting aspect of the event, organization of an association festival booth, and judging of the Chalk Art contest. Work with event producer to identify funding through the City’s new Festival Grants process.

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

11) Identify a partner and produce a spring 2020 Wine Walk fundraiser event, coordinating wineries, business participation, and marketing.

12) Produce the “Taste of North Berkeley” restaurant walk in spring 2020 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 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.

**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 contractor services in completing regular sidewalk cleaning and special projects as needed.
3) Coordinate work of the City funded Downtown Streets Team to assist with area clean-up.
4) Investigate design and finding possibilities for a median landscaping improvement project to coincide with the Shattuck Ave. roadway repair project, including City funding and a UC Berkeley Chancellor’s Grant.
5) Work with property owners and appropriate city departments to address signage conditions and the appearance of empty storefronts and vacant properties in the district.
6) Oversee installation of annual winter holiday street tree lighting throughout the district.
7) 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 if possible.
8) 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, current information for zoning regulations/amendments, and work with property owners to fill currently vacant commercial space in 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) Market the Uptima Boot Camp and Project Equity business support services available through the City as part of the Small Business Support package.
5) 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.
6) 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.
7) Work with the City and Ecology Center on issues related to the Farmers Market operations.
8) Identify opportunities for better utilization of public transportation resources in the district and financing and operation options for alternative transportation including shuttles.
9) 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.
10) Identify and act on any business education/assistance needs for business retention.

Budget
BID collections for Fiscal Year 2020 are estimated to be $182,648 with the approved 5% increase in the
current assessments. A projected carryforward of $1,214 from Fiscal Year 2019 will result in a total estimated budget of $183,860 for Fiscal Year 2020. BID assessment revenues will be spent in accordance with the Management District Plan as follows:

<table>
<thead>
<tr>
<th>Service/Expense Category</th>
<th>Projected Fiscal Year 2019 Carry Forward</th>
<th>Fiscal Year 2020 Projected Revenues</th>
<th>Allowable % of Annual Budget</th>
<th>Estimated Total Fiscal Year 2020 Budget</th>
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<tbody>
<tr>
<td>Maintenance and Beautification</td>
<td>$274</td>
<td>$73,059</td>
<td>40%</td>
<td>$73,333</td>
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<tr>
<td>Marketing and Promotion</td>
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<td>25%</td>
<td>$46,488</td>
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<tr>
<td>Organization/Administration</td>
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<td>$54,794</td>
<td>30%</td>
<td>$54,906</td>
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<tr>
<td>Contingency</td>
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<td>$9,132</td>
<td>5%</td>
<td>$9,133</td>
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<td>Total Estimated Budget</td>
<td>$1,213</td>
<td>$182,648</td>
<td>100%</td>
<td>$183,860</td>
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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 2020 assessments is attached as Exhibit B to this report.

Approved by:

Approved by the Board of Directors
Cathy Goldsmith, President, North Shattuck Association
On March 21, 2019

Prepared by: Heather E. Hensley, Executive Director, North Shattuck Association
<table>
<thead>
<tr>
<th>APN</th>
<th>Owner Name</th>
<th>Site Address</th>
<th>Private Parcels</th>
<th>FY 2020 Assessment</th>
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<tr>
<td>058</td>
<td>BERKELEY BAZAAR PARTNERS</td>
<td>1550 SHATTUCK AVE</td>
<td>$</td>
<td>17,651.66</td>
</tr>
<tr>
<td>058</td>
<td>BANK OF AMERICA NATIONAL TRUST</td>
<td>1536 SHATTUCK AVE</td>
<td>$</td>
<td>2,422.50</td>
</tr>
</tbody>
</table>

Total Revenues: $185,805.00
Count of Properties: 51

County Collection Fee @ 1.7%: $3,158.69
Net Assessment Revenue: $182,646.32

Note: Data for APN, Owner and Land Use from the City's Land Management System is current as of March 26, 2019.
Updated data from the County current as of December 31, 2018, will be available in July 2019.