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OFFICE OF THE CITY CLERK  
OAKLAND

2017 MAY 12 AM 9:13

# AGENDA REPORT

**TO:** Sabrina B. Landreth  
City Administrator

**FROM:** Mark Sawicki  
Director, EWD

**SUBJECT:** Resolution of Intention to Form the  
KCBD 2017 - **SUPPLEMENTAL**

**DATE:** May 9, 2017

City Administrator Approval

Date:

## RECOMMENDATION

**Staff Recommends That The Oakland City Council Accept and Approve the resolutions as amended on May 9, 2017 by the Community and Economic Development Committee as Described herein:**

## REASON FOR SUPPLEMENTAL

On May 9, 2017 the following amendments to the proposed KCBD 2017 District Management Plan were discussed and accepted by the Community and Economic Development (CED) Committee and forwarded to the City Council for consideration on May 16, 2017. The amended resolutions approved by the CED committee include the following amendments:

1. A ten percent (10%) districtwide reduction to the overall KCBD 2017 assessment and budget - This amendment was requested by district stakeholders based on input from affected property owners. At the original assessment level, Year 1 (Fiscal Year 2017-2018) assessment revenues for the district were projected to be \$628,208.75. Under the new, reduced assessment level Year 1 assessment revenues will be \$555,964.74, if the proposed KCBD 2017 is formed. Special Benefit Service categories will remain the same and comprise the same percentage of the district's total budget as previously stated with one exception - that installation and use of closed circuit television (CCTV) will be deleted from Sidewalk Operations as a cost saving measure.
2. A required recalculation of the assessment on APN 009-0698-032-00 (2935 Telegraph Avenue) - The original amount to be assessed was \$39,237.92 (based on 280,000 building square feet). The new and corrected amount to be assessed is \$29,473.98 (based on 212,785 building square feet). The new assessment amount is based on updated building square footage recently provided by the affected property owner and on the 10% districtwide reduction to the overall assessment described in Item 1 above.

The above adjusted square footage also reduces Benefit Zone 1 total building square feet from 1,479,599 to 1,412,384.

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3. Clarification that APN 008 -0674-036-00 (437 25<sup>th</sup> Street) might be removed from the district - said parcel is currently included in the 2017 CBD, and will benefit from the maintenance, servicing, and operation of the KCBD 2017 improvements; however, this parcel is projected to merge with another property that is already part of the Lake Merritt/Uptown CBD, a different district also formed pursuant to Oakland Municipal Code Chapter 4.48 ("Code"). If the merger occurs, then entire parcel will thus be included in the Lake Merritt/Uptown CBD, as a parcel may only be included in one assessment district formed pursuant to the Code. This parcel will, however, be levied in the KCBD 2017 until it becomes part of the Lake Merritt/Uptown CBD.

4. The cumulative Fiscal Year 2017-2018 assessment on two City-owned properties - (2100 Telegraph Ave - APN 008-0648-016-03; and 404-26<sup>th</sup> Street - APN 009-0684-005-01) has been reduced from an original amount of \$4,897.26 to a new amount of \$4,403.31. The original assessments on the above parcels were \$4,161.79 and \$735.46, respectively. The new assessments are \$3,750.55 and \$652.75, respectively. This reduction is due to the 10% decrease in districtwide assessments described in Item 1 above.

5. The Fiscal Year 2017-2018 assessment on one Oakland Redevelopment Successor Agency (ORSA) owned property - (2016 Telegraph Ave - APN 008-0649-010-00) has been reduced from an original amount of \$722.74 to a new amount of \$696.18. This reduction is due to the 10% decrease in districtwide assessments described in Item 1 above.

With the exception of the above amendments, all other information for the proposed KCBD 2017 remains the same. The Engineer's Report, District Plan, and assessment roll have all been amended to reflect the above recommendations of the CED Committee.

#### **ACTION REQUESTED OF THE CITY COUNCIL**

Staff Recommends That The Oakland City Council Accept and Approve the following revised Resolutions as Amended by the CED Committee on May 9, 2017. Resolutions. Additions are indicated by underscored text and deletions are indicated by strikethrough text:

1) Adopt An Amended Resolution Of Intention (1) To Form The Koreatown/Northgate Community Benefit District 2017 ("KCBD 2017"); (2) Granting Preliminary Approval Of The KCBD 2017 Management Plan ; (3) Directing Filing Of The Proposed KCBD 2017 Assessment District Boundary Description; (4) Directing Distribution of A Ballot To All Affected Property Owners Whereby They Can Vote "In Favor Of" or "Against" the Proposed KCBD 2017 And Assessment To Determine Whether A Majority Protest Exists; And (5) Scheduling A Public Hearing For July 18, 2017.

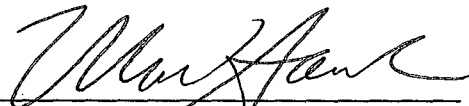
2) Adopt An Amended Resolution Authorizing The City Administrator (1) To Sign The Ballot In Favor Of The Formation Of The Koreatown/Northgate Community Benefit District 2017 ("KCBD 2017"); And (2) To Pay A Cumulative Fiscal Year 2017-2018 Fair Share Assessment In An Approximate Amount of \$4,403.31 ~~\$4,897.26~~ For Two (2) City-Owned Properties On Which Assessments Are To Be Levied (2100 Telegraph Avenue - APN 008-0648-016-03 and 404 26<sup>th</sup> - Street APN 009-0684-005-01) If The KCBD 2017 Is Established; AND

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3) The Oakland Redevelopment Successor Agency (ORSA) Governing Body (1) Adopt An Amended Resolution Authorizing The Agency Administrator To Sign The Ballot In Favor Of The Formation Of Koreatown/Northgate Community Benefit District 2017 ("KCBD 2017"); And (2) To Pay A Cumulative Fiscal Year 2017-2018 Fair Share Assessment In An Approximate Amount Of \$696.18 ~~\$722.74~~ For One Oakland Redevelopment Successor Agency-Owned Property (2016 Telegraph Avenue APN 008-0649-010-00) If The KCBD 2017 Is Established

For questions regarding this report, please contact Maria Rocha, BID Program Manager, at 510-238-6176.

Respectfully submitted,

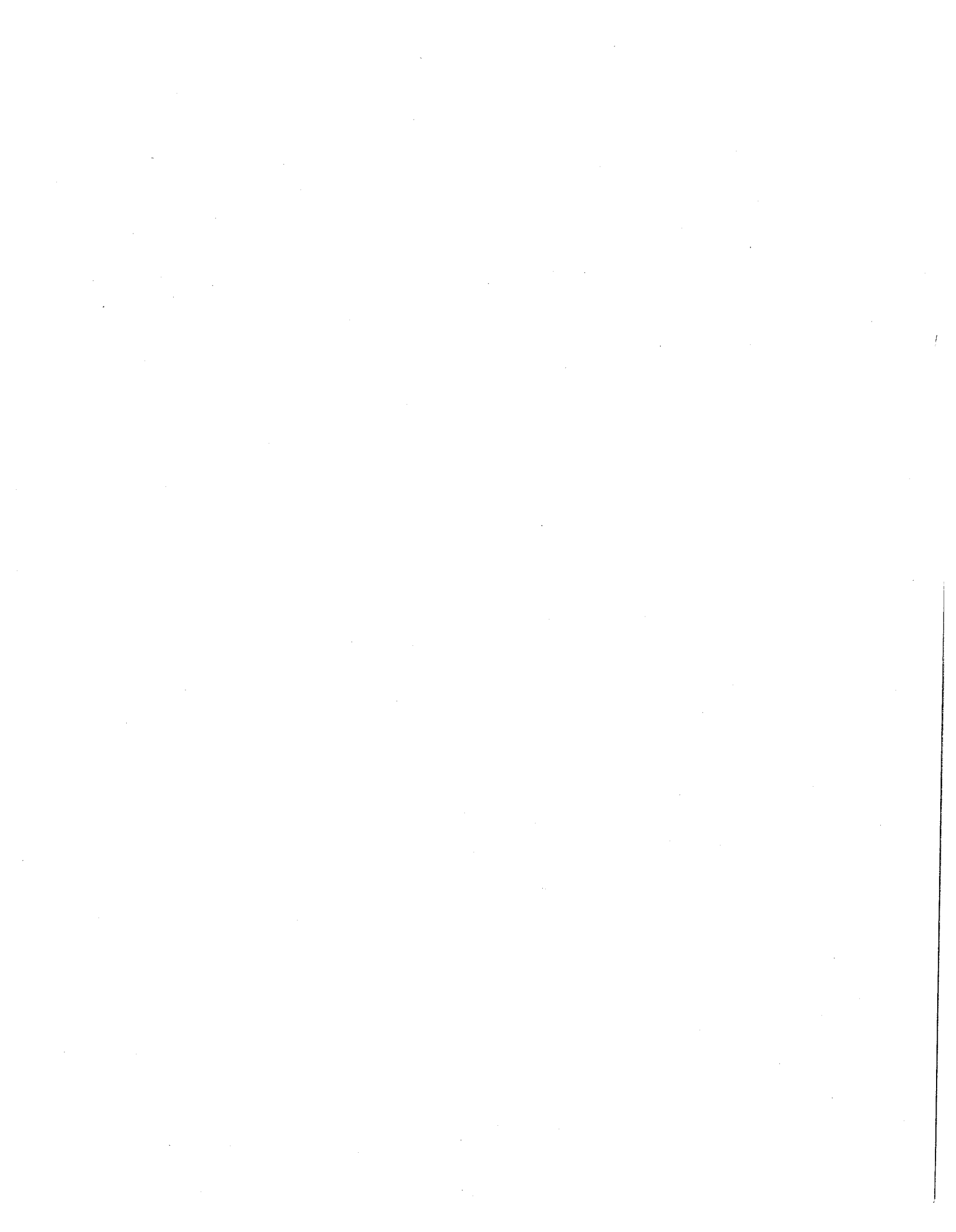


MARK SAWICKI, Director  
Department of Economic and Workforce  
Development

Prepared by:  
Maria Rocha, BID Program Coordinator

Attachments (3): 1) Amended City Resolution of Intention to Form the KCBD 2017, including Revised **Exhibit A** and Revised **Exhibit B**; 2) Amended City Resolution Authorizing The City Administrator To Sign The Ballot In Favor Of The Formation Of KCBD 2017 and To Pay Related FY 2017-2018 Assessments On City Property, If The KCBD 2017 Is Formed; 3) Amended Oakland Redevelopment Successor Agency (ORSA) Resolution Authorizing The Agency Administrator To Sign The Ballot In Favor Of The Formation Of KCBD 2017 and To Pay Related FY 2017-2018 Assessment On ORSA Property, If The KCBD 2017 Is Formed

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OAKLAND CITY COUNCIL

RESOLUTION \_\_\_\_\_ C.M.S.

**RESOLUTION (1) OF INTENTION TO FORM THE KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017 ("KOREATOWN/NORTHGATE CBD 2017"); (2) GRANTING PRELIMINARY APPROVAL OF THE KOREATOWN/NORTHGATE CBD 2017 MANAGEMENT PLAN 2016; (3) DIRECTING FILING OF THE PROPOSED KOREATOWN/NORTHGATE CBD 2017 ASSESSMENT DISTRICT BOUNDARY DESCRIPTION; (4) DIRECTING DISTRIBUTION OF A BALLOT TO ALL AFFECTED PROPERTY OWNERS WHEREBY THEY CAN VOTE "IN FAVOR OF" OR "AGAINST" THE PROPOSED KOREATOWN/NORTHGATE CBD 2017 AND ASSESSMENT TO DETERMINE WHETHER A MAJORITY PROTEST EXISTS; AND (5) SCHEDULING A PUBLIC HEARING FOR JULY 18, 2017**

**WHEREAS**, the City Council of the City of Oakland enacted the City of Oakland Business Improvement Management District Ordinance (Chapter 4.48, Ordinance 12190 of 1999, hereinafter "BIMD Ordinance") establishing the procedures for the formation of business improvement management districts; and

**WHEREAS**, the City Council approved a Neighborhood Business Improvement District ("NBID") Program pursuant to Oakland City Council Resolution No. 75323, dated November 9, 1999, to provide technical and financial assistance to stakeholder groups of business and property owners in the City to assist in the formation of such districts; and

**WHEREAS**, the property owners in the Koreatown/Northgate district (generally: Telegraph Avenue from 20<sup>th</sup> Street to 35<sup>th</sup> Street) previously petitioned for the creation of the Koreatown/Northgate Community Benefit District 2007 (hereinafter "Koreatown/Northgate CBD 2007"), and said Koreatown/Northgate CBD 2007 and corresponding assessments were approved by the Oakland City Council through Resolution No. 80788 C.M.S., dated July 17, 2007; and

**WHEREAS**, the Koreatown/Northgate CBD 2007 will reach the end of its maximum 10 year existence by the end of 2017, as authorized by Oakland Municipal Code Chapter 4.48; and

**WHEREAS**, the property owners in the Koreatown/Northgate district have duly petitioned to form the Koreatown/Northgate Community Benefit District 2017 ("Koreatown/Northgate CBD 2017") under the BIMD Ordinance (OMC section 4.48.050.A.), and have proposed the Koreatown/ Northgate CBD 2017 Management Plan as amended May 9, 2017 ("Koreatown/Northgate CBD 2017 Plan as Amended May 9, 2017") attached hereto and

incorporated by reference as *Exhibit A*, for the operation of the Koreatown/Northgate CBD 2017; and

**WHEREAS**, the Koreatown/Northgate CBD 2017 Plan contains a detailed engineer's report as amended May 9, 2017 prepared by a registered professional engineer recognized by the State of California (see *Appendix C* of *Exhibit A* to this Resolution of Intention) ("Engineer's Report"); and

**WHEREAS**, the Koreatown/Northgate CBD 2017 Plan as Amended May 9, 2017 was prepared in accordance with the provisions of Article XIII of the California Constitution, and has been filed with the City Clerk for proceedings in formation of this district; and

**WHEREAS**, the Koreatown/Northgate CBD 2017 Plan as Amended May 9, 2017, incorporated by this reference, when compared to the Koreatown/ Northgate CBD 2007 Plan), provides for enhanced cleaning, marketing, and promotional activities and improvements of particular benefit to the properties located within the proposed Koreatown/Northgate CBD 2017 (as more specifically identified therein); and

**WHEREAS**, the Koreatown/Northgate CBD 2017 Plan as Amended May 9, 2017 was prepared in accord with the provisions of the BIMD Ordinance overseeing the formation of the Koreatown/ Northgate CBD 2017 as referenced above, and has been filed with the City Clerk for proceedings in formation of this Koreatown/Northgate CBD 2017; now, therefore be it

**RESOLVED**, that the City Council of the City of Oakland finds that the Koreatown/Northgate CBD 2017 Plan as Amended May 9, 2017 satisfies all the requirements of the BIMD Ordinance, the laws of the State of California and the California Constitution with regard to the formation of business improvement management districts, and does hereby resolve, find, determine and give notice as follows:

1. The Preliminary Report of the City Clerk was filed on April 27, 2017 which describes the matters required by the BIMD Ordinance.
2. A business improvement management district is proposed to be established pursuant to the BIMD Ordinance with the boundaries as specified in the Koreatown/Northgate CBD 2017 Plan as Amended May 9, 2017.
3. A copy of the preliminary report of the City Clerk is on file in the office of the City Clerk relating to the formation of the Koreatown/Northgate CBD 2017.
4. The Koreatown/Northgate CBD 2017 Plan as Amended May 9, 2017 is preliminarily approved and the assessments for the first year shall be as provided for in the Koreatown/ Northgate CBD 2017 Plan as Amended May 9, 2017 if the Koreatown/Northgate CBD 2017 is established.
5. The District shall be a business improvement management district, and the name of the District shall be the "Koreatown/Northgate Community Benefit District 2017".

6. The reasons for the assessments and the types of the improvements and activities proposed to be funded and acquired by the levy of assessments on property in the Koreatown/Northgate CBD 2017 and the time period for which the proposed improvements are to be made are those specified in Sections 4, 5 and 6 of the Koreatown/Northgate CBD 2017 Plan as Amended May 9, 2017.
7. Except where funds are otherwise available, an assessment will be levied annually to pay for all improvements and activities within the Koreatown/Northgate CBD 2017.
8. No fiscal impact is anticipated to the City. The Koreatown/Northgate CBD 2017 if approved will be a self-funded and self-administered entity. Until disbursed, Koreatown/Northgate CBD 2017 assessments will be held in a special trust fund established on behalf of the district in Miscellaneous Trusts Fund (7999)/Treasury Operations Org (08721)/Pass Thru Assessments Account (24224)/DP 080 Administrative Project (1000007)/Koreatown BID (KBID).
9. The boundaries of the Koreatown/Northgate CBD 2017 are described and delineated in Section 2 of the Koreatown/Northgate CBD 2017 Plan as Amended May 9, 2017, including a map outlining each affected lot.
10. The proposed Koreatown/Northgate CBD 2017 contains three Benefit Zones, which are delineated in the benefit zone map of *Appendix A* of the Koreatown/Northgate CBD 2017 Plan as Amended May 9, 2017.
11. The proposed method and basis of levying the assessments to be levied against each property in the Koreatown/Northgate CBD 2017 is based on the location, building square footage, linear frontage and property type of each parcel located within the Koreatown/Northgate CBD 2017, and the assessments proposed for each property are contained in *Appendix B* to the Koreatown/Northgate CBD 2017 Plan as Amended May 9, 2017 and in Section 8 of the Engineer's Report as Amended May 9, 2017 attached as *Appendix C* to the Koreatown/Northgate CBD 2017 Plan as Amended May 9, 2017.
12. The assessments for the entire Koreatown/Northgate CBD 2017 equal \$555,964.74 for the first year of the Koreatown/Northgate CBD 2017 and the amount chargeable to each parcel are as shown in *Appendix B* and *Appendix C* Engineer's Report to the Koreatown/Northgate CBD 2017 Plan as Amended May 9, 2017.
13. The Koreatown/Northgate CBD 2017 shall be in existence for a period of ten (10) years (from July 1, 2017 through June 30, 2027 as provided for in the Koreatown/Northgate CBD 2017 Plan as Amended May 9, 2017) during which a maximum 5% increase per year in the amount of the assessment on each property shall be allowable as provided for in the Koreatown/Northgate CBD 2017 Plan as Amended May 9, 2017.

14. The assessment shall be attached to the property and collected with the annual county property taxes, and in certain cases through a special municipal billing, and shall continue annually as provided for in the Koreatown/Northgate CBD 2017 Plan as Amended May 9, 2017 for each year that the Koreatown/Northgate CBD 2017 is in existence unless modified by the City Council on the recommendation of the Koreatown/Northgate CBD 2017 Advisory Board.
15. The City Clerk is directed to mail a copy of the Resolution of Intention to form the Koreatown/Northgate CBD 2017 along with the ballots (see **Exhibit B** hereto) for the written protest procedure to all affected property owners in the Koreatown/Northgate CBD 2017 in compliance with the BIMD Ordinance and Article XIII of the California Constitution and to each local Chamber of Commerce and business organization known to be located within the Koreatown/ Northgate CBD 2017, give all other notices and take all other actions required by law, and give notice of the dates of the Public Hearing and Final Action on the Petition for Formation of the Koreatown/Northgate CBD 2017 to all affected property owners in the proposed Koreatown/Northgate CBD 2017 not less than forty-five (45) days before the scheduled public hearing, and also publish the Resolution of Intention in a newspaper of general circulation in the City of Oakland once, at least seven (7) days before the public hearing. The ballots mailed to the affected property owners shall contain the procedures for the completion and return of the ballots.
16. **A Public Hearing is set for July 18, 2017, (at 6:30 P.M. in the City Council Chambers in City Hall,** located at 1 Frank H. Ogawa Plaza, Oakland California), and as may be continued by the City Council, to hear public testimony and protests, to complete the counting of the returned ballots as to the formation of the District, and to take final action as to the formation of the District.
17. At the Public Hearing, the testimony of interested persons for or against the establishment of the Koreatown/Northgate CBD 2017, the proposed assessment, the boundaries of the Koreatown/Northgate CBD 2017, or the furnishing of the specified types of improvements or activities will be heard.
18. **BALLOT PROCEDURES:**
  - a. Filing of BALLOTS – Persons/entities who receive ballots shall mail them in or file them personally with the City Clerk’s Office before the close of the July 18, 2017 Public Hearing. Ballots include an option to either vote YES in Favor of establishment or NO against establishment of the Koreatown/Northgate CBD 2017. The procedures applicable to the completion and return of the ballots are as specified in the ballot, a copy of which is attached hereto as **Exhibit B** and incorporated herein by this reference.
  - b. **MAJORITY PROTEST - If there is a majority protest, the assessment will not be imposed.** A majority protests exists if, upon the conclusion of the Public Hearing, ballots submitted in opposition to the Koreatown/ Northgate CBD 2017 and corresponding assessment exceed the ballots



submitted in favor of the Koreatown/Northgate CBD 2017 and corresponding assessment.

- i. A protest may be made in writing by any interested person through the ballot procedure. Any protest pertaining to the regularity or sufficiency of the proceedings shall be in writing and shall clearly set forth the irregularity or defect to which the objection is made.
  - ii. Every written protest shall be filed with the City Clerk at or before the time fixed for the Public Hearing. A written protest may be withdrawn in writing at any time before the conclusion of the Public Hearing.
  - iii. Each written protest shall contain a description of the property in which the person subscribing the protest is interested sufficient to identify the property and, if a person subscribing is not shown on the official records of the City as the owner of the property, the protest shall contain or be accompanied by written evidence that the person subscribing is the owner of the property.
  - iv. A written protest which does not comply with the requirements stated above shall not be counted in determining a majority protest.
- c. TABULATION OF BALLOTS - After the close of the Public Hearing, tabulation of the ballots will be completed under the direction of the City Clerk and the results of the tabulation will be reported to the City Council. In tabulating the ballots, the ballots shall be weighted according to the proportional financial obligation upon the affected property.

IN COUNCIL, OAKLAND, CALIFORNIA, \_\_\_\_\_, \_\_\_\_\_

**PASSED BY THE FOLLOWING VOTE:**

AYES- BROOKS, CAMPBELL WASHINGTON, GALLO, GIBSON MCELHANEY, GUILLEN, KALB, KAPLAN, and PRESIDENT REID

NOES-

ABSENT-

ABSTENTION-

ATTEST: \_\_\_\_\_  
LATONDA SIMMONS  
City Clerk and Clerk of the Council  
of the City of Oakland, California



EXHIBIT A  
(to the Resolution of Intention to Form the KCBD 2017  
as Amended on May 9, 2017)

# **KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017**

**Management District Plan**

April 2017, as Amended on May 9, 2017

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# 1. EXECUTIVE SUMMARY

## 1.1. *The Koreatown/Northgate Community Benefit District*

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Summary: City of Oakland (the "City") property owners along Telegraph Avenue from 20th Street to Interstate 580, and the City of Oakland City Council (the City Council") approved the formation of the Koreatown/Northgate Community Benefit District of 2007 – a business improvement management district (BIMD), pursuant to Chapter 4.48 of the City's Municipal Code – in 2007 for a ten-year period (the "2007 CBD"). Since formation, Koreatown Oakland, the nonprofit Koreatown/Northgate CBD Management Corporation (the "Management") has been working with



the community to provide special services that benefit property by providing a Sidewalk Operations Program and a Marketing and Identity Enhancement Program. In 2017, property owners in the 2007 CBD, and other owners located in the proposed expanded boundaries, will be asked to establish the funding for services provided through the BMID for an additional 10-year period.

## 1.2. *Goal of the Koreatown/Northgate CBD 2017*

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The goal of the Koreatown/Northgate Community Benefit District 2017 (the "2017 CBD") is to provide a long-term, stable and equitable means of funding the Sidewalk Operations Program and the Marketing and Identity Enhancement Program, as described in Section 4, herein.

## 1.3. *Boundaries*

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The proposed new 2017 CBD boundaries include property in three Benefit Zones, described below:

### Benefit Zone 1 (Telegraph Avenue)

Property fronting Telegraph Avenue from 20<sup>th</sup> Street to Interstate 580, plus the parking structure west of Telegraph Avenue between Sycamore Street and 27<sup>th</sup> Street. This largely reflects the area of the 2007 CBD.

### Benefit Zone 2 (Art Zone)

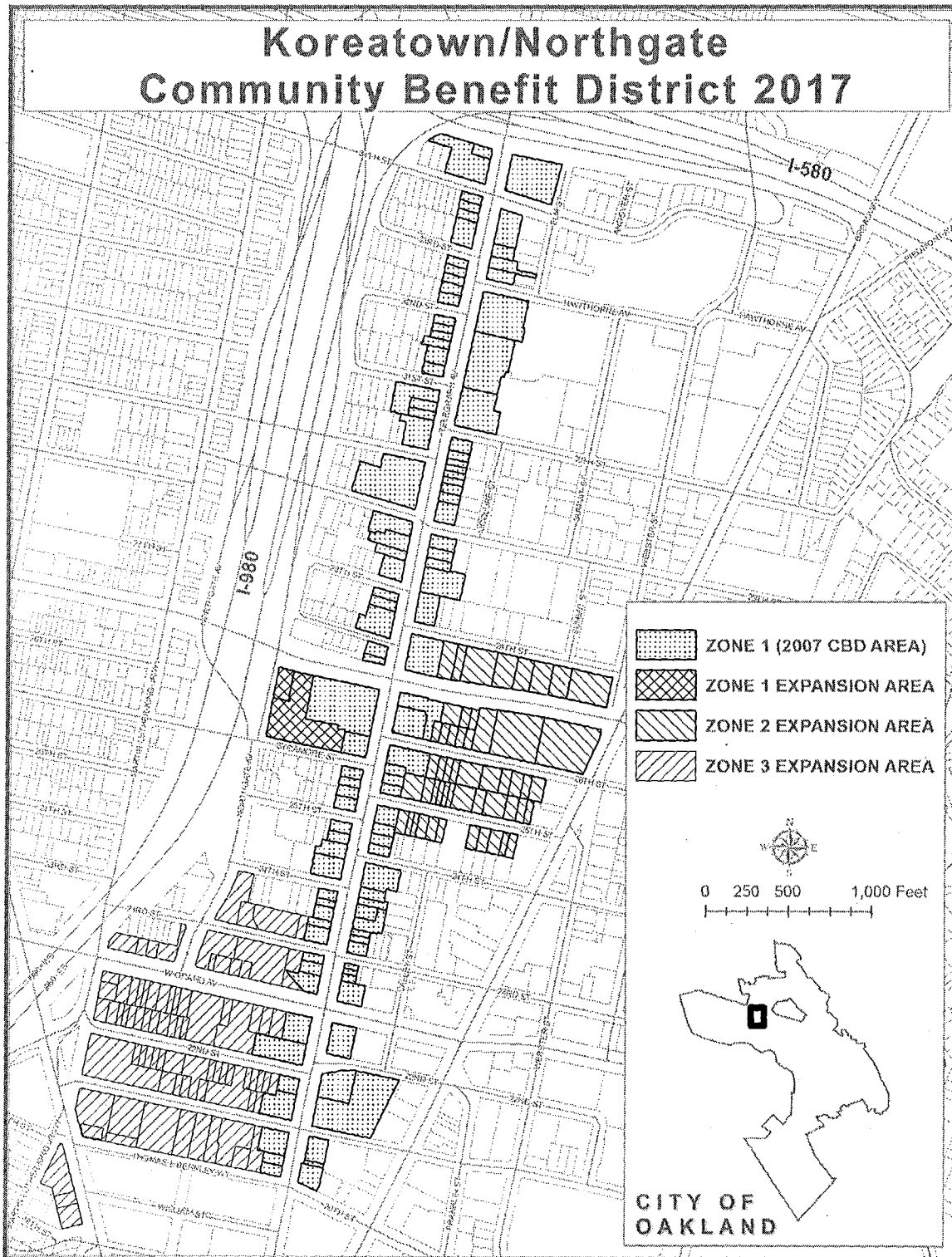
Property along 25<sup>th</sup> Street from Telegraph Avenue to Broadway (but not including those parcels fronting Broadway), 26<sup>th</sup> Street from Telegraph Avenue to Broadway, and the north side of 27<sup>th</sup> Street from Telegraph Avenue to Broadway. This does not include any property fronting Telegraph included in Benefit Zone 1.

### Benefit Zone 3 (Downtown West)

Property along the north side of 20<sup>th</sup> Street from Telegraph Avenue to San Pablo Avenue, 21<sup>st</sup> Street from Telegraph Avenue to San Pablo Avenue, 22<sup>nd</sup> Street from Telegraph Avenue to Martin Luther King, Jr. Way, West Grand Avenue from Telegraph Avenue to Martin Luther King, Jr. Way, 23<sup>rd</sup> Street from Telegraph Avenue to Northgate Avenue, and the west side of San Pablo Avenue from 19<sup>th</sup> Street to 20<sup>th</sup> Street. This does not include any property fronting Telegraph included in Benefit Zone 1.



The following page shows the proposed boundaries of the 2017 CBD, and how it relates to the 2007 CBD.



## **1.4. Management District Plan Overview**

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The Management District Plan is the result of the work of property owners dedicated to improving the Koreatown/Northgate area within the City of Oakland. The Management District Plan includes an updated and expanded boundary, annual budget, assessment methodology, and district management guidelines.



## 2. DISTRICT AT A GLANCE

In 2007, property owners established a BIMD for a ten-year operational term. Based on the success of the prior district, property owners have shown support to establish a new BIMD with updated and expanded boundaries and adjustments to the assessment methodology.

### 2.1. Koreatown/Northgate Community Benefit District 2017 Boundaries

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The proposed boundaries include property in three Benefit Zones, described below:

#### Benefit Zone 1 (Telegraph Avenue)

Property fronting Telegraph Avenue from 20<sup>th</sup> Street to Interstate 580, plus the parking structure west of Telegraph Avenue between Sycamore Street and 27<sup>th</sup> Street. The properties included in this Benefit Zone are the same as for the 2007 CBD, except for the addition of said parking structure. There are 173 properties, 17,171 linear front feet, and 1,412,384 building square feet within Benefit Zone 1.



#### Benefit Zone 2 (Art Zone Expansion Area)

Property along 25<sup>th</sup> Street from Telegraph Avenue to Broadway (but not including those parcels fronting Broadway), 26<sup>th</sup> Street from Telegraph Avenue to Broadway, and the north side of 27<sup>th</sup> Street from Telegraph Avenue to Broadway. This does not include any property fronting Telegraph included within Benefit Zone 1. This Benefit Zone adds 72 properties, 4,830 linear front feet, and 399,625 building square feet to the 2017 CBD as compared to the 2007 CBD.

#### Benefit Zone 3 (Downtown West Expansion Area)

Property along the north side of 20<sup>th</sup> Street from Telegraph Avenue to San Pablo Avenue, 21<sup>st</sup> Street from Telegraph Avenue to San Pablo Avenue, 22<sup>nd</sup> Street from Telegraph Avenue to Martin Luther King, Jr. Way, West Grand Avenue from Telegraph Avenue to Martin Luther King, Jr. Way, 23<sup>rd</sup> Street from Telegraph Avenue to Northgate Avenue, and the west side of San Pablo Avenue from 19<sup>th</sup> Street to 20<sup>th</sup> Street. This does not include any property fronting Telegraph included within Benefit Zone 1. This Benefit Zone adds 204 properties, 8,511 linear front feet, and 962,707 building square feet to the 2017 CBD as compared to the 2007 CBD.

Refer to Appendix A for a proposed boundary map that more fully provides a description of the BIMD's boundaries.

## 2.2. Services

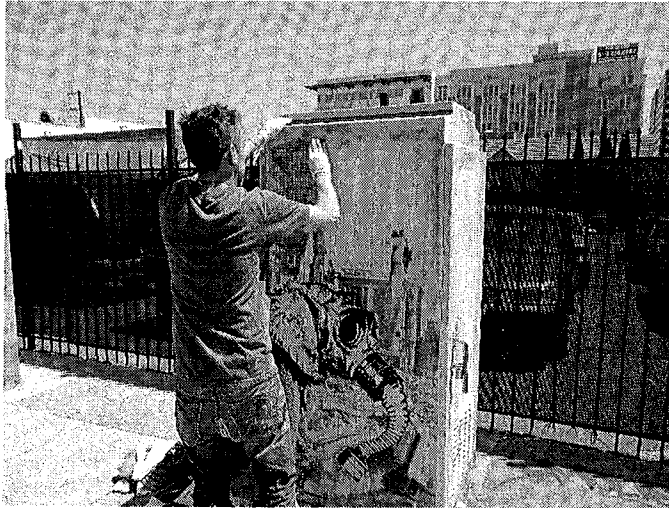
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The improvements, maintenance, and activities provided in this Management District Plan include the provision of the Sidewalk Operations Program and the Marketing and Identity Enhancement Program, as well as various management activities to support those efforts, as further described in Section 4, herein.

## 2.3. Annual Total Budget and Assessments

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The total proposed annual operating budget for Fiscal Year 2017/18 is \$650,000 \$575,250.. Assessment revenue of \$628,208.75 \$555,964.74 provides 96.49% 96.65% of the annual operating budget. The remaining portion of the annual operating budget will be generated from sources other than assessments, such as any CBD-earned revenues, fundraising, grants, donations, and in-kind donations. No funds of the City will be used to supplement the annual budget of the 2017 CBD.



Any surplus monies from the 2007 CBD, as of December 31, 2017, to be carried over to the 2017 CBD can only be used to benefit those properties within the 2007 CBD. If this is not practical, such surplus monies will be refunded to property owners in the 2007 CBD in proportion to how they were assessed in the 2007 CBD.

The assessment calculation for each property utilizes a combination of land use, street front footage, and building square footage. Section 6 of this Management District Plan provides a more detailed procedure of the annual assessment calculation.

## 2.4. Term

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If established, assessments would be collected for ten years (July 1, 2017, through June 30, 2027). Expenditure of those collected assessments can continue for up to six months after the end of the assessment collection period (December 31, 2027), at which point the 2017 CBD would terminate, if not renewed.

### **3. BACKGROUND**

Property owners establish special assessment districts to provide a constant funding source for various improvements, maintenance, and activities that benefit properties within a defined geographical area. The improvements, maintenance, and activities can include providing enhanced cleaning and maintenance services, improving security, providing for marketing activities to promote and revitalize an area, and other programs found to benefit an area. The ongoing revenue stream for the improvements, maintenance, and activities comes from the annual assessments funded by properties within the special assessment district. The process by which special assessment districts are formed is outlined below.

#### **3.1. What is a Business Improvement Management District (BIMD)?**

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A BIMD is a special assessment district that provides for the levy and collection of assessments on properties within a geographically defined area. Assessment revenue collected from the benefitting properties pays the costs associated with the improvements, maintenance, and activities provided to the BIMD area. In Oakland, the legislation that allows for the establishment of a BIMD is by Title 4, Chapter 4.48 of the City's Municipal Code (the "Code").

A BIMD established under the Code may be administered, by the City Administrator's designation, by an owners' non-profit management corporation. The owners' non-profit management corporation administers or implements the activities and improvements specified in the management district plan. The City Council appointed CBD advisory board shall make a recommendation to the City Council on the expenditure of revenues derived from the levy of assessments, on the classification of properties applicable, and on the method and basis of levying the assessments. The advisory board shall also cause to be prepared a report of each fiscal year for which assessments are to be levied and collected. The annual report shall contain, but is not limited to, any proposed changes in the CBD boundaries or any benefit zones within the district; the improvement and activities to be provided for that fiscal year; an estimate of the cost of providing the improvements and the activities for that fiscal year; the method and basis of 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 to be made from sources other than assessments levied pursuant to this part. In Oakland, the City Council must authorize the formation and establishment of the BIMD and the City will enter into a written agreement with the owners' non-profit management corporation and provide for the levy and collection of the annual assessments.

Many BIMDs are also commonly called Community Benefit Districts, or CBDs.

#### **3.2. Establishing a BIMD**

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The Code provides the legal framework for establishing this BIMD. As part of the formation proceedings, proponents prepare a Management District Plan in accordance with Section 4.48.06 of the Code. The Management District Plan must contain, but is not limited to, the following required elements:

- A map of the district in sufficient detail to locate each parcel of property within the district;
- The name of the proposed district;
- A description of the boundaries of the district, including the boundaries of any benefit zones, proposed for the establishment or extension of the district in a manner sufficient to identify the lands included. Under no circumstances shall the boundaries of a proposed district overlap with the boundaries of another existing district created pursuant to this part. Nothing in this part prohibits the boundaries of a district created pursuant to this part to

overlap with other assessment districts established pursuant to other provisions of law including, but not limited to, the Parking and Business Improvement Area Law of 1989;

- The improvements and activities proposed for each year of operation of the district and the maximum cost thereof;
- The total annual amount proposed to be expended for improvements, maintenance and operations;
- The proposed source or sources of financing including the proposed method and basis of levying the assessment in sufficient detail to allow each property owner to calculate the amount of the assessment to be levied against his or her property;
- The time and manner of collecting the assessments;
- Any proposed rules and regulations to be applicable to the district.

### ***3.3. BIMD Name Designation***

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The name designation of this proposed BIMD is the Koreatown/Northgate Community Benefit District 2017 (the "2017 CBD").

### ***3.4. Timeline for Implementation and Completion of the District***

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The 2017 CBD assessment will be effective beginning July 1, 2017, and ending June 30, 2027. District operations will begin in January 2018 and end in December 2027.

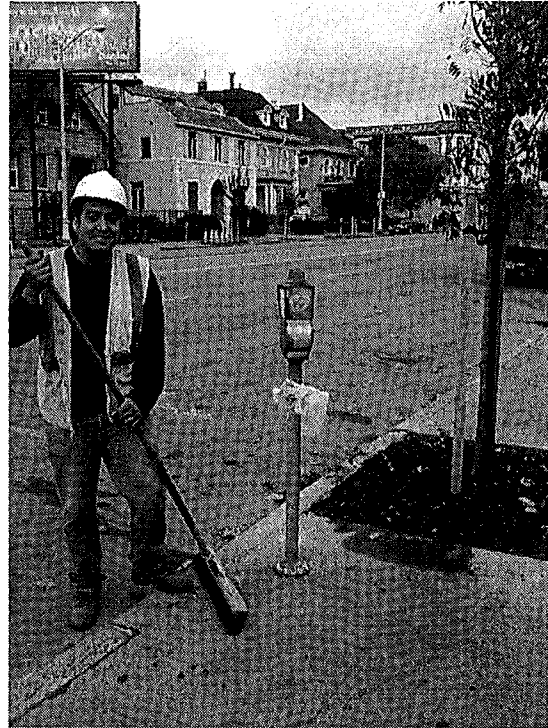
## 4. DESCRIPTION OF SERVICES

The 2017 CBD will provide for the ongoing provision of the Sidewalk Operations Program, Marketing and Identity Enhancement Program, and management activities all located within the boundaries of the 2017 CBD.

### 4.1. Sidewalk Operations Program

The 2017 CBD plans to implement a comprehensive program that aims to ensure the maximum possible cleanliness of sidewalks, curbs, fixtures, and buildings throughout the 2017 CBD boundaries. Through the utilization of managed services, the Sidewalk Operations Program will strive for a clean and litter-free area that significantly reduces graffiti or other signs of decay. The goal is for property owners, merchants, and residents alike to maintain a sense of pride throughout the KONO area. Cleanliness is crucial to the growth of an aesthetically pleasing and vibrant community.

The 2017 CBD's Sidewalk Operations Program includes regular sidewalk and gutter sweeping, scheduled steam cleanings, refuse removal, graffiti removal, and streetscape improvements. The following sidewalk operations will be carried out:



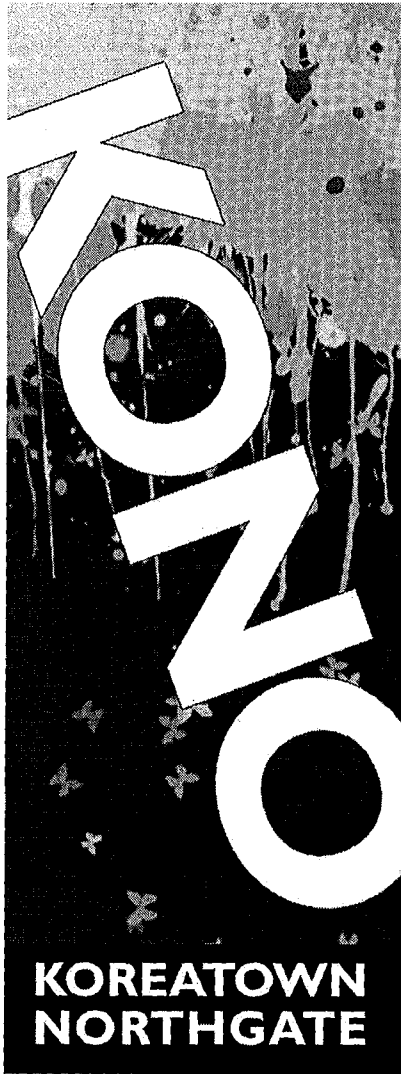
#### Benefit Zone 1 (Enhanced Level of Service)

- Regular sidewalk and gutter sweeping – six times per week
- Sidewalk steam cleaning – two times per year
- Reporting and removal of illegal dumping – as needed; assessed daily
- Reporting and removal of graffiti – within 24-48 hours
- Weed removal from tree wells, frontage of buildings, gutters, and sidewalks – monthly
- Beautification and streetscape improvements
- Private security patrol officer – as needed
- ~~Installation and use of closed circuit television (CCTV)~~
- Reporting incidents of crime to the City

#### Benefit Zones 2 and 3 (Base Level of Service)

- Regular sidewalk and gutter sweeping – three times per week
- Sidewalk steam cleaning – one time per year
- Reporting and removal of illegal dumping – as needed; assessed daily
- Reporting and removal of graffiti – within 24-48 hours
- Weed removal from tree wells, frontage of buildings, gutters, and sidewalks – monthly
- Beautification and streetscape improvements
- Private security patrol officer – as needed
- ~~Installation and use of CCTV~~
- Reporting incidents of crime to the City

## **4.2. Marketing and Identity Enhancement (MIE) Program**



In order to promote the unique character of the KONO neighborhood, the 2017 CBD will implement a Marketing and Identity Enhancement Program.

The Marketing and Identity Enhancement Program will promote the 2017 CBD's properties and businesses through specially targeted programs and initiatives. In addition, these activities will contribute to the economic and social vitality of the area, and help with the recruitment and retention of businesses and other entities. 2017 CBD stakeholders view marketing activities as especially useful and necessary during a time of economic downturn, and to help the area stabilize itself and grow during prosperous economic times.

The 2017 CBD will also support the creation and production of special events that draw visitors into the 2017 CBD as a means of additional exposure, including the First Friday event, not to exceed amounts indicated in the below MIE budget category. The First Friday event and the 2017 CBD shall also remain as separate legal entities and there shall be no co-mingling of funds between the First Friday event and the 2017 CBD.

The 2017 CBD will program special events and conduct marketing activities in various parts of the 2017 CBD. The 2017 CBD marketing and promotion services will make sure new visitors, employees, patrons, and residents know about area attractions and will help them enjoy their experience in the 2017 CBD. The 2017 CBD plans to include other marketing initiatives, as appropriate, and as budget resources allow.

In addition, the 2017 CBD will promote the 2017 CBD as a clean, safe, and vibrant area for businesses, visitors, and residents, while also supporting business growth.

The Marketing and Identity Enhancement Program will carry out the following tasks:

### Benefit Zones 1 and 2 (Enhanced Level of Service)

- Special and retail events – including Oakland First Friday event, as described above
- Maintenance and updating of the KONO website
- Advertising for businesses within the 2017 CBD
- Communications
- Business attraction/retention

### Benefit Zone 3 (Base Level of Service)

- Maintenance and updating of the KONO website
- Advertising for businesses within the 2017 CBD
- Communications
- Business attraction/retention



### **4.3. Management and Operations**

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In addition to the costs to maintain and service the 2017 CBD improvements mentioned above, the Management will incur costs for staff time and expense related to the programs mentioned above, as well as the administration of the 2017 CBD. Staff time includes oversight and coordination of both Management and contractor provided services, annual tax roll preparation, and addressing property owner questions and concerns. These activities are directly related to the 2017 CBD and improvements within the 2017 CBD, and without them the improvements could not be efficiently completed or properly maintained on an ongoing basis.

The Management's effectiveness in forming and maintaining relationships with the community is a vital component to the success of the 2017 CBD. A strong community relations effort emphasizes the importance of positive relationships within the 2017 CBD and encourages maximum community involvement. The Management will also afford the opportunity to garner other material, grants, and financial support for the improvements, maintenance, and activities of the 2017 CBD.

Regular activities, initiatives, resources that support this task include:

- A dedicated staff who will serve as a focal point and advocate for the 2017 CBD
- Office expenses including accounting, rent, utilities, office supplies, insurance, legal, and other professional services related to 2017 CBD activities



## 5. ANNUAL AMOUNT TO BE COLLECTED & EXPENDED

The estimated cost budget for the first operating year of the 2017 CBD (January 1, 2018 through December 31, 2018) to be levied in Fiscal Year 2017/2018 is as follows:

Description	FY 2017/2018 Budget
<b>Operating Costs:</b>	
Sidewalk Operations Program	\$357,500.00 <u>316,387.50</u>
Marketing and Identity Enhancement Program	97,500.00 <u>86,287.50</u>
Operating Reserve	32,500.00 <u>28,762.50</u>
<b>Total Operating Costs</b>	<b>\$487,500.00 \$431,437.50</b>
<b>Incidental Costs:</b>	
2017 CBD Administration Costs <sup>1</sup>	\$162,500.00 <u>143,812.50</u>
<b>Total Incidental Costs</b>	<b>\$162,500.00 \$143,812.50</b>
<b>Total Operating and Incidental Costs</b>	<b>\$650,000.00 \$575,250.00</b>

(1) Includes assessment engineering, 2017 CBD administration, County Auditor/Controller fees, and 1% City administrative fee.

Any surplus monies from the 2007 CBD, as of December 31, 2017, to be carried over to the 2017 CBD can only be used to benefit those properties within the 2007 CBD. If this is not practical, such surplus monies will be refunded to property owners in the 2007 CBD in proportion to how they were assessed in the 2007 CBD.

The 2018 estimated operating budget will be funded as follows:

Description of Revenue Source	FY 2017/18 Revenue Amount
FY 2017/18 Assessment Revenue	\$628,208.75 <u>555,964.74</u>
Contributions for General Benefit (4.47% of Total Operating Costs) <sup>1</sup>	21,791.25 <u>19,285.26</u>
<b>Total FY 2017/2018 Annual Revenue</b>	<b>\$650,000.00 \$575,250.00</b>

(1) Comprised of additional funds generated from sources other than assessments, such as 2017 CBD-earned revenues, fundraising, grants, donations, and in-kind donations. Total Operating Costs include Direct Operation and Maintenance Costs and Reserve Costs.

Each fiscal year beginning Fiscal Year 2018/2019, the maximum allowable assessment rate per special benefit point may increase by up to five percent (5.00%) based on demonstrated need and a recommendation by the 2017 CBD advisory board in its annual report to the City and on City Council approval. The annual assessment cannot exceed the actual costs to operate the 2017 CBD in any given year.

Based upon a maximum possible annual assessment increase of 5.0%, beginning July 1, 2018, the total annual maximum assessment revenue each year for each of the 10-years is described in the following table:

Year	Fiscal Year	Total Maximum Annual Assessment Revenue <sup>1</sup>	
1	2017/2018	\$555,964.74	\$628,208.75
2	2018/2019	583,762.98	659,649.19
3	2019/2020	612,951.13	692,600.15
4	2020/2021	643,598.69	727,230.15
5	2021/2022	675,778.62	763,594.66
6	2022/2023	709,567.55	801,774.25
7	2023/2024	745,045.93	841,859.84
8	2024/2025	782,298.23	883,952.80
9	2025/2026	821,413.14	928,150.44
10	2026/2027	862,483.79	974,557.96
	<b>Total:</b>	<b>\$6,992,864.80</b>	<b>\$7,901,542.16</b>

(1) Based upon assigned Special Benefit Points in FY 2017/2018. Property characteristics may change from year-to-year, which can affect the calculation of Special Benefit Points in future years. If total 2017 CBD Special Benefit Points increase in future years due to development, land use classification changes, etc., the maximum assessment revenue may increase accordingly.

## **6. METHOD OF ASSESSMENT**

### **6.1. Source(s) of Funding**

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The levy and collection of annual assessments upon property within the 2017 CBD provides the primary funding source for the improvements, services, and activities previously outlined. The Management will also generate additional funds from sources other than annual assessments on properties within the 2017 CBD. These funds may include 2017 CBD-earned revenues, fundraising, grants, donations, and in-kind donations.

The 2017 CBD will not issue bonds to finance any of the improvements, services, and activities provided by the 2017 CBD.

### **6.2. Basis of Assessment**

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The benefits provided to real property within the 2017 CBD relate to the improvements, services, and activities carried out by the Management and more fully described in Section 4, herein.

### **6.3. General Benefit Assignment**

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General benefit is a benefit to the public at large resulting from the implementation of 2017 CBD services. The amount of general benefit that is provided from the 2017 CBD improvements, services, and activities cannot be funded by assessments within the 2017 CBD. It has been determined that 4.47% of the total benefits from the 2017 CBD improvements, services, and activities are considered to accrue to the public at large. Accordingly, 95.4653% of the benefits from the 2017 CBD improvements, services, and activities are considered to provide special benefits to the properties within the 2017 CBD and thus could be subject to assessment therein. Please see the City of Oakland Koreatown/Northgate Community Benefit District 2017 Engineer's Report (the "Engineer's Report"), included as Appendix C, for a more detailed discussion of the calculation of the general benefit.

### **6.4. Special Benefit Point Assignment**

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Each of the parcels within the 2017 CBD receives a special benefit from the improvements. Each parcel that has a special benefit conferred upon it, as a result of the maintenance and operation of improvements, is identified and the proportionate special benefit derived by each identified parcel is determined in relationship to the total benefits from the maintenance and operation of the improvements.

The total costs of maintenance and operation, less the amount of general benefit identified, will be assessed to the parcels within the 2017 CBD based on the benefit points assigned to each parcel. To assess special benefit appropriately, it is necessary to relate parcels of different land uses, location, and proximity to improvements. Please see the Engineer's Report, included as Appendix C, for a more detailed discussion of the special benefit point assignment.

Benefit points are assigned based upon not only the property's location to the 2017 CBD improvements, maintenance, and activities, but also the property's existing land use designation and pedestrian traffic associated with those different land uses. Those property land uses that are more likely to generate and attract activity receive a greater benefit from the 2017 CBD's improvements, maintenance, and activities when compared to those properties that do not generate as much traffic. 2017 CBD improvements, maintenance, and activities will be provided uniformly throughout each respective zone of service within the 2017 CBD boundaries. These clean and safe areas create an

aesthetically pleasing and safe environment for 2017 CBD properties, and those individuals utilizing 2017 CBD property, whether it is to shop, dine, live, utilize services, or visit.

**Improved Aesthetics and Safety Benefit Points**

Benefit Zone 1 (Enhanced Level of Service for Sidewalk Operations)

The aesthetic benefit points and safety benefit points in Benefit Zone 1 are assigned as follows:

Property Land Use	Aesthetic Benefit Points	Safety Benefit Points
Non-Residential Property	1.250 1.222	1.250 1.222
Residential Property	1.413 1.384	1.413 1.384
Non-Profit / Public Property	0.188 0.183	0.188 0.183
Undeveloped Property	0.188 0.183	0.188 0.183

Benefit Zones 2 and 3 (Base Level of Service for Sidewalk Operations)

The aesthetic benefit points and safety benefit points for Benefit Zones 2 and 3 are assigned as follows:

Property Land Use	Aesthetic Benefit Points	Safety Benefit Points
Non-Residential Property	1.000	1.000
Residential Property	1.130	1.130
Non-Profit / Public Property	0.150	0.150
Undeveloped Property	0.150	0.150

**Economic Benefit Points**

Benefit Zone 1 (Enhanced Level of Service for Sidewalk Operations, Enhanced Level of Service for Marketing and Identity Enhancement Operations)

The economic benefit points for Benefit Zone 1 are assigned as follows:

Property Land Use	Economic Benefit Points
Non-Residential Property	2.500 2.462
Residential Property	1.250 1.234
Non-Profit / Public Property	0.625 0.616
Undeveloped Property	0.313 0.308

Benefit Zone 2 (Base Level of Service for Sidewalk Operations, Enhanced Level of Service for Marketing and Identity Enhancement Operations)

The economic benefit points for Benefit Zone 2 are assigned as follows:

Property Land Use	Economic Benefit Points
Non-Residential Property	2.166 2.154
Residential Property	1.083 1.077
Non-Profit / Public Property	0.542 0.539
Undeveloped Property	0.271 0.269

Benefit Zone 3 (Base Level of Service for Sidewalk Operations, Base Level of Service for Marketing and Identity Enhancement Operations)

The economic benefit points for Benefit Zone 3 are assigned as follows:

Property Land Use	Economic Benefit Points
Non-Residential Property	2.00
Residential Property	1.00
Non-Profit / Public Property	0.50
Undeveloped Property	0.25

The total benefit point assignment for each of the property land use categories in each Benefit Zone is as follows:

Benefit Zone 1

Property Land Use	Aesthetic Benefit Points	Safety Benefit Points	Economic Benefit Points	Total Benefit Points
Non-Residential Property	1.250 1.222	1.250 1.222	2.500 2.462	5.000 4.906
Residential Property	1.413 1.384	1.413 1.384	1.250 1.234	4.076 3.993
Non-Profit/Public Property	0.188 0.183	0.188 0.183	0.625 0.616	1.001 0.982
Undeveloped Property	0.188 0.183	0.188 0.183	0.313 0.308	0.689 0.674

Benefit Zone 2

Property Land Use	Aesthetic Benefit Points	Safety Benefit Points	Economic Benefit Points	Total Benefit Points
Non-Residential Property	1.000	1.000	2.166 2.154	4.166 4.154
Residential Property	1.130	1.130	1.083 1.077	3.343 3.337
Non-Profit/Public Property	0.150	0.150	0.542 0.539	0.842 0.839
Undeveloped Property	0.150	0.150	0.271 0.269	0.571 0.569

Benefit Zone 3

Property Land Use	Aesthetic Benefit Points	Safety Benefit Points	Economic Benefit Points	Total Benefit Points
Non-Residential Property	1.000	1.000	2.000	4.000
Residential Property	1.130	1.130	1.000	3.260
Non-Profit/Public Property	0.150	0.150	0.500	0.800
Undeveloped Property	0.150	0.150	0.250	0.550

**Parcel Factors**

The method of apportioning benefit to parcels within the 2017 CBD reflects the proportional special benefit assigned to each property from the 2017 CBD improvements, maintenance, and activities based upon the various property characteristics for each parcel as compared to other properties within the 2017 CBD. As part of the special benefit analysis various property characteristics were analyzed including street frontage, building size, land use, etc. Given that the special benefits provided by the 2017 CBD improvements, maintenance, and activities focus on aesthetic benefit, safety benefit and economic activity benefit, it was determined that linear street frontage, building square footage, and land use are the most appropriate parcel factors. Each parcel's linear street

frontage, building square footage, and land use have been used as the primary assessment variables for the calculation and assignment of parcel factors.

Land Use

Properties in the 2017 CBD are assigned a land use category, as further outline below, and may be reassigned if the property's land use changes.

**Non-Residential Property:** Non-Residential Property consists of parcels owned or leased by a profit-making entity (rather than by a government or non-profit entity) and used for commercial purposes such as retail, office, restaurant, commercial garage, or hotel/motel property.

**Non-Profit Property:** Non-Profit Property consists of parcels owned or used as follows:

- Includes parcels owned by non-profit entities approved under section 501(c) of the Internal Revenue Service code.
- Includes parcels that are occupied (80% or more of building square footage) by one or more non-profit corporations, as tenants.
- Includes parcels that are occupied (80% or more of building square footage) by activities that receive a welfare tax exemption or by an affordable housing development regulated by covenants or regulatory agreements with a public agency.
- Includes parcels owned by, or leased to, a public utility.

**Public Property:** Public Property consists of parcels owned or used as follows:

- Includes parcels owned by a state, regional, or city government entity; for example, police stations, schools, and government-owned office buildings.
- Includes parcels that are occupied (80% or more of building square footage) by one or more public entities, as tenants.

**Residential Property:** Residential Property consists of single-family dwellings, duplexes, triplexes, fourplexes, condominiums, and apartment units used exclusively for residential purposes.

By adjusting the assigned special benefit points assigned for each property land use category by parcel factors, a more complete picture of the proportional special benefits received by each parcel within the 2017 CBD is presented. Therefore, linear, and building factors were calculated and assigned for each parcel in the 2017 CBD according to the formulas below:

Linear Factor

Given the linear nature of the cleaning and public safety improvements, maintenance, and activities, each parcel within the 2017 CBD is assigned a linear factor that is equal to the parcel's linear street frontage that receives ongoing 2017 CBD cleaning and public safety improvements, maintenance, and activities.

In order to create a factor to account for the many variations in frontages throughout the 2017 CBD, the minimum frontage for City properties was considered. Pursuant to the City's Planning Code, each lot shall have a frontage of at least 25 linear feet for most of the zoning uses within the 2017 CBD. Utilizing the prescribed minimum frontage as set forth in the City's Planning Code, a linear factor is calculated for each parcel based upon the assigned linear street footage for the parcel divided by 25:

Parcel's Linear Factor	=	Parcel's Assigned Linear Street Frontage	/	25
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There are several parcels throughout the 2017 CBD that share the same area footprint, with each of these parcels being assigned a separate Assessor's Parcel Number by the Alameda County Assessor's office. For those areas that include multiple Assessor's Parcels, each Assessor's Parcel's assigned linear street frontage shall be calculated by allocating the total linear street frontage for the area equally (or on another rational basis) to each Assessor's Parcel located on the footprint of that area.

Building Factor

Buildings throughout the 2017 CBD range from a single-story structure to a large building with multiple stories. In order to create a factor to account for the many variations in the buildings, the minimum lot size for the area was considered. In the KONO area, the majority of the buildings within the 2017 CBD cover most or the entire footprint of the lot. Pursuant to the City's Planning Code, each lot shall have an area of at least 4,000 square feet for most zoning uses. Utilizing the prescribed minimum lot square footage as set forth in the City's Planning Code, a building factor is calculated for each parcel based upon the assigned building square footage for the parcel divided by 4,000:

Building Factor	=	Parcel's Assigned Building Square Footage	/	4,000
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**Total Special Benefit Points Calculation**

The formula below shows the total special benefit points calculation for each parcel within the 2017 CBD:

Parcel's Total Special Benefit Points	=	(Linear Factor + Building Factor)	x	Total Benefit Points Assignment
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**Total 2017 CBD Special Benefit Points**

| The total special benefit points for the 2017 CBD at this time are ~~6,406.18~~ 6,412.580.

**6.5. Assessment Calculation**

The method of assessment is discussed in detail in Engineer's Report and is summarized below:

**Total Costs to be Assessed / Total 2017 CBD Special Benefit Points = Assessment Rate per Special Benefit Point**

| **~~\$628,208.75~~ 555,964.74 / ~~6,406.18~~ 6,412.580 = ~~\$98.06293~~ \$86.69908**

| Parcel's Assessment = ~~\$98.06293~~ \$86.69908 x Parcel's Total Special Benefit Points

**6.6. Number of Years Assessments Will Be Levied**

The proposed term for the 2017 CBD is set at 10 years. The assessment will be effective July 1, 2017, through June 30, 2027 (Fiscal Year 2017/18 up through and including Fiscal Year 2026/27). Expenditure of collected assessments may continue for up to six months after June 30, 2027, if the district is not renewed. In order to authorize the levy and collection of assessments after Fiscal Year 2026/27, the City and Management will need to go through the renewal process pursuant to the Code.

## ***6.7. Time and Manner of Collecting Assessments***

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Each property owner pays a share of the cost of the 2017 CBD improvements, maintenance, and activities based on an assessment formula. The payment is collected twice yearly, through the property tax bill. The 2017 CBD assessment, including any delinquent assessment and related interest and penalties, will be received by the Tax Collector of the County of Alameda. The Tax Collector shall transfer the assessment payments to the City for distribution to the 2017 CBD for the funding of the improvements, services, and activities described in this Management District Plan. Any assessment on a property that does not receive a property tax bill from the County of Alameda will be billed-directly by the City.

## ***6.8. Appeals Process***

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The City Manager may assist with the resolution of any discrepancies in individual assessment amounts or calculations. The City Manager reserves the right to:

- Conduct reviews of existing primary data; verify assessment data as compiled by any consultant, subcontractor or other party hired by the Management; and perform field or on-site inspections to verify the accuracy of existing or secondary data, or to investigate the claim of any property owner in the 2017 CBD.
- Recalculate the assessment amount due and direct the Alameda County Auditor-Controller to respond appropriately.
- Upon the request of the City, the 2017 CBD Management shall promptly complete requests for an investigation of discrepancies and make all reasonable efforts to obtain additional documentation related to the assessment upon any or all of the properties for which a correction or adjustment is requested.

## ***6.9. Assessor's Parcel Listing***

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Appendix B of this Management District Plan provides a listing of all of the Assessor's Parcels, including the Assessor's Parcel Number, Site Address, Land Use Classification, Building Square Footage, Street Front Footage, Special Benefit Points, and Fiscal Year 2017/18 Assessment subject to the 2017 CBD annual assessment.

## **7. DISTRICT MANAGEMENT**

### **7.1. Koreatown/Northgate CBD Management Corporation**

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Koreatown Oakland, acting as the Koreatown/Northgate 2017 CBD Management Corporation (the "Management"), is a non-profit organization whose membership consists of the parcel owners that are assessed under the 2017 CBD, and is the "designated non-profit organization" as outlined in Section 4.48.160 and will administer the 2017 CBD through an agreement with the City.

The Management is charged with the day-to-day operations of the 2017 CBD.

### **7.2. Advisory Board**

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Prior to adopting a resolution establishing the 2017 CBD, the City Council shall appoint an advisory board, as outlined in Section 4.48.190 of the Code. The advisory board will be distinct from the Management and shall make a recommendation to the City Council on the expenditure of revenues derived from the levy of assessments, on the classification of properties applicable, and on the method and basis of levying the assessments.

The Management will recommend members to serve on the advisory board. Advisory board membership will be designed to equitably represent all stakeholders and areas of the 2017 CBD, with specific provisions that at least one member of the advisory board shall be a business licensee within the 2017 CBD who is not also a property owner within the 2017 CBD. Stakeholders shall develop an equitable board of directors structure, which represents residential parcel owners, as well as commercial property owners of various sizes.

Each year, the CBD advisory board shall prepare a report for each Fiscal Year, except the first year, for which assessments are levied and collected to pay the costs of the improvements, services, and activities described in the report. Each annual report must be filed with the City Clerk per Section 4.48.200 of the Code; each report shall contain or provide, but not be limited to the following:

- Any proposed changes in the boundaries of the 2017 CBD or in any benefit zones within the district;
- The improvements and activities to be provided for that fiscal year;
- An estimate of the cost of providing the improvements and the activities for that fiscal year;
- The method and basis of levying the assessment in sufficient detail to allow each real property owner to estimate the amount of the assessment to be levied against his or her property for that fiscal year;
- The amount of any surplus or deficit revenues to be carried over from a previous fiscal year;
- The amount of any contributions to be made from sources other than assessments levied pursuant to the Code.

The City Council may approve the annual report as filed, or the City Council may modify any particulars contained in the report, and then approve it as modified. Given the potential resulting impact to an assessment levy, any changes to the improvements, services, and/or activities require City Council approval. Any modification to the annual report shall be made pursuant to Section 4.48.140 of the Code, except that any proposed increase in the amount of the levy above levels previously noticed and approved must be approved as provided in Sections 4.48.070 through 4.48.140 of the Code. However, the City Council cannot approve a change in the basis and method of levying assessments that would impair an authorized or executed contract to be paid from the revenues derived from the levy of assessments.

### **7.3. Public Access**

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The advisory board and the 2017 CBD management corporation are both required to comply with specified state open meeting and public records laws, the Ralph M. Brown Act (the "Brown Act"), commencing with Section 54950 of the Government Code, and the California Public Records Act, commencing with Section 6250 of the Government Code. Ralph M. Brown Act compliance is required when 2017 CBD business is heard, discussed, or deliberated, and the California Public Records Act compliance is required for all documents relating to 2017 CBD business.

### **7.4. Rules and Regulations**

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Pursuant to the Code, the Management may establish rules and regulations that uniquely apply to the 2017 CBD. A few initial rules and regulations should be employed in the administration of the 2017 CBD:

- Following the formation of the 2017 CBD, the CBD advisory board should consider developing a policy for competitive bidding as it pertains to contracted services for the 2017 CBD. The policy will aim to maximize service quality, efficiency, and cost effectiveness.
- Any stakeholder who serves on the advisory board shall recuse themselves from any vote in which a potential conflict of interest is apparent. Such potential conflicts include, but are not limited to: prioritizing capital improvement projects which result in special benefit to specific property owners, prioritization of services to benefit a particular owner or group of owners, hiring or selecting the relatives of advisory board members.
- As previously noted, meetings of the advisory board shall be open to all stakeholders paying into the 2017 CBD and are subject to the Brown Act. Regular financial reports shall be submitted to advisory board members and made available upon request by the membership. Sub-committee meetings of the Management shall be open and encourage participation among various stakeholders, business owners, and community members. The advisory board shall retain the right to enter into executive session for reasons including, but not limited to: legal matters, personnel issues, etc.
- The Management will create a number of policies which will help the advisory board to effectively manage the 2017 CBD. Such policies may include, but not be limited to: a decision-making policy, use of banner policy, special event underwriters policy, use of logo policy, and an economic hardship policy.

### **7.5. Dissolution**

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The 2017 CBD, when there is no indebtedness, outstanding and unpaid, incurred to accomplish any of the purposes of the 2017 CBD, may be disestablished by resolution by the City Council in either of the following circumstance:

- (1) If the City Council finds there has been misappropriation of funds, malfeasance, or a violation of law in connection with the management of the 2017 CBD, it shall notice a hearing on disestablishment.
- (2) During the operation of the 2017 CBD, there shall be a 30-day period each year in which assessed property owners may request disestablishment of the 2017 CBD. The first such period shall begin one year after the date of establishment of the 2017 CBD and shall continue for a 30-day period. The next such 30-day period shall begin two years after the date of the establishment of the 2017 CBD. Each successive year of operation of the 2017 CBD shall have such a 30-day period. Upon the written petition of the owners of real property in the area who pay more than 30 percent of the assessments levied, the City Council shall notice a hearing on disestablishment. The City Council shall notice a hearing on disestablishment.

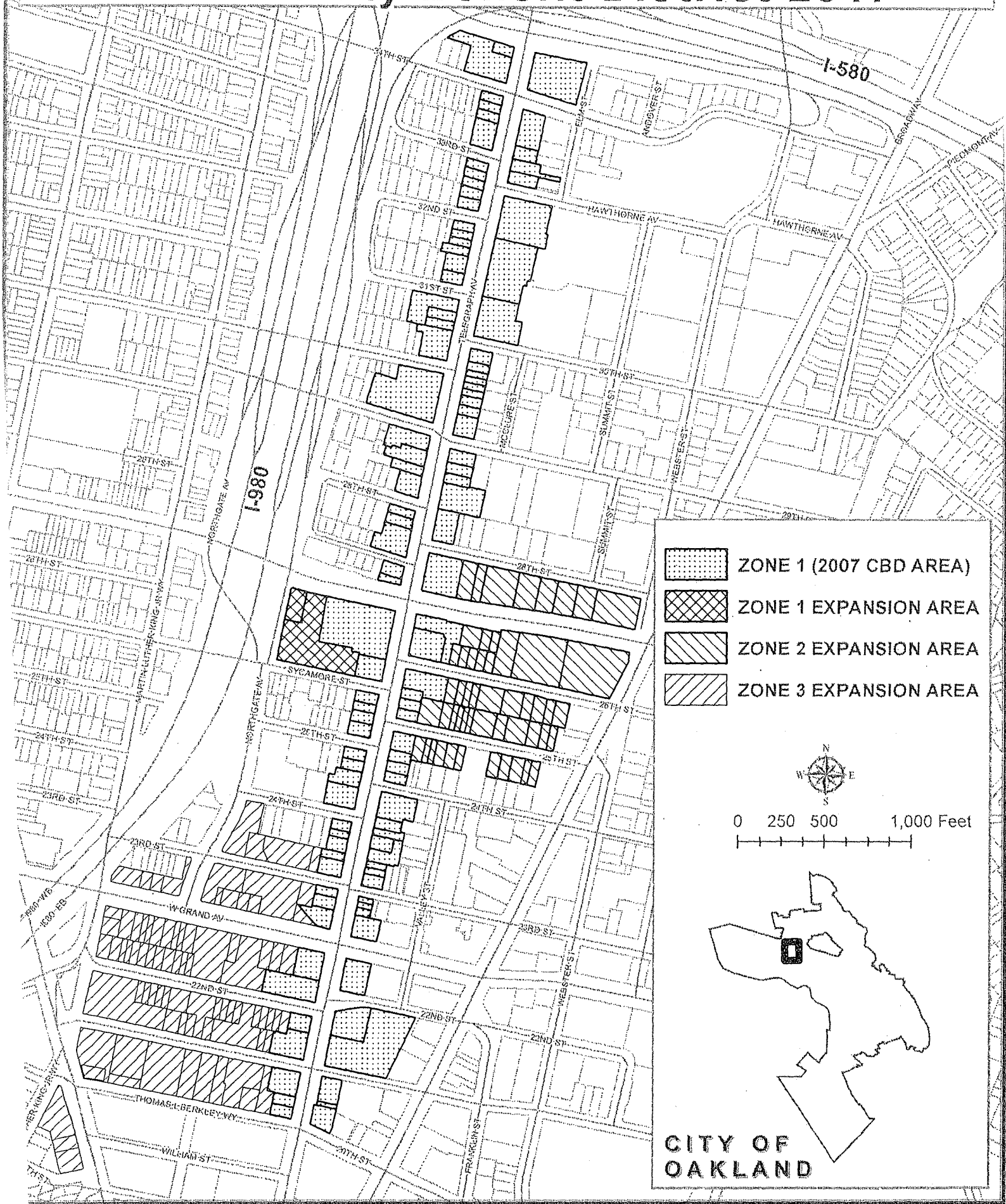
The City Council shall adopt a resolution of intention to disestablish the 2017 CBD prior to the public hearing. The resolution shall state the reason for the disestablishment, shall state the time and place of the public hearing, and shall contain a proposal to dispose of any assets acquired with the revenues of the assessments levied within the 2017 CBD. The public hearing shall be held not less than 30-days or more than 60-days after the adoption of the resolution of intention.

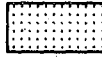



Upon the disestablishment of the 2017 CBD, any remaining revenues derived from the levy of assessments, or any revenues derived from the sale of assets acquired with the revenues, shall be refunded to the owners of the property then located and operating within the 2017 CBD in which assessments were levied by applying the same method and basis that was used to calculate the assessments levied in the fiscal year in which the district was disestablished. If the disestablishment occurs before an assessment is levied for the fiscal year, the method and basis that was used to calculate the assessment levied in the immediate prior fiscal year shall be used to calculate the amount of refund.

## **8. APPENDICES**

**APPENDIX A – BOUNDARY MAP**

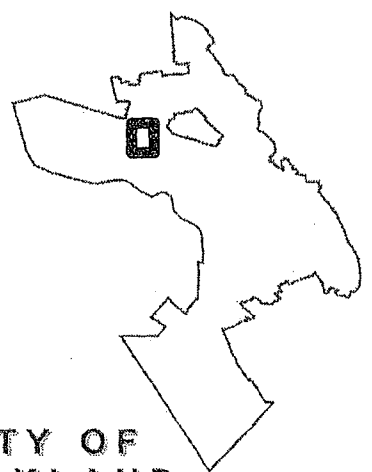
# Community Benefit District 2017



-  ZONE 1 (2007 CBD AREA)
-  ZONE 1 EXPANSION AREA
-  ZONE 2 EXPANSION AREA
-  ZONE 3 EXPANSION AREA



0 250 500 1,000 Feet



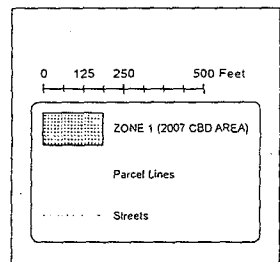
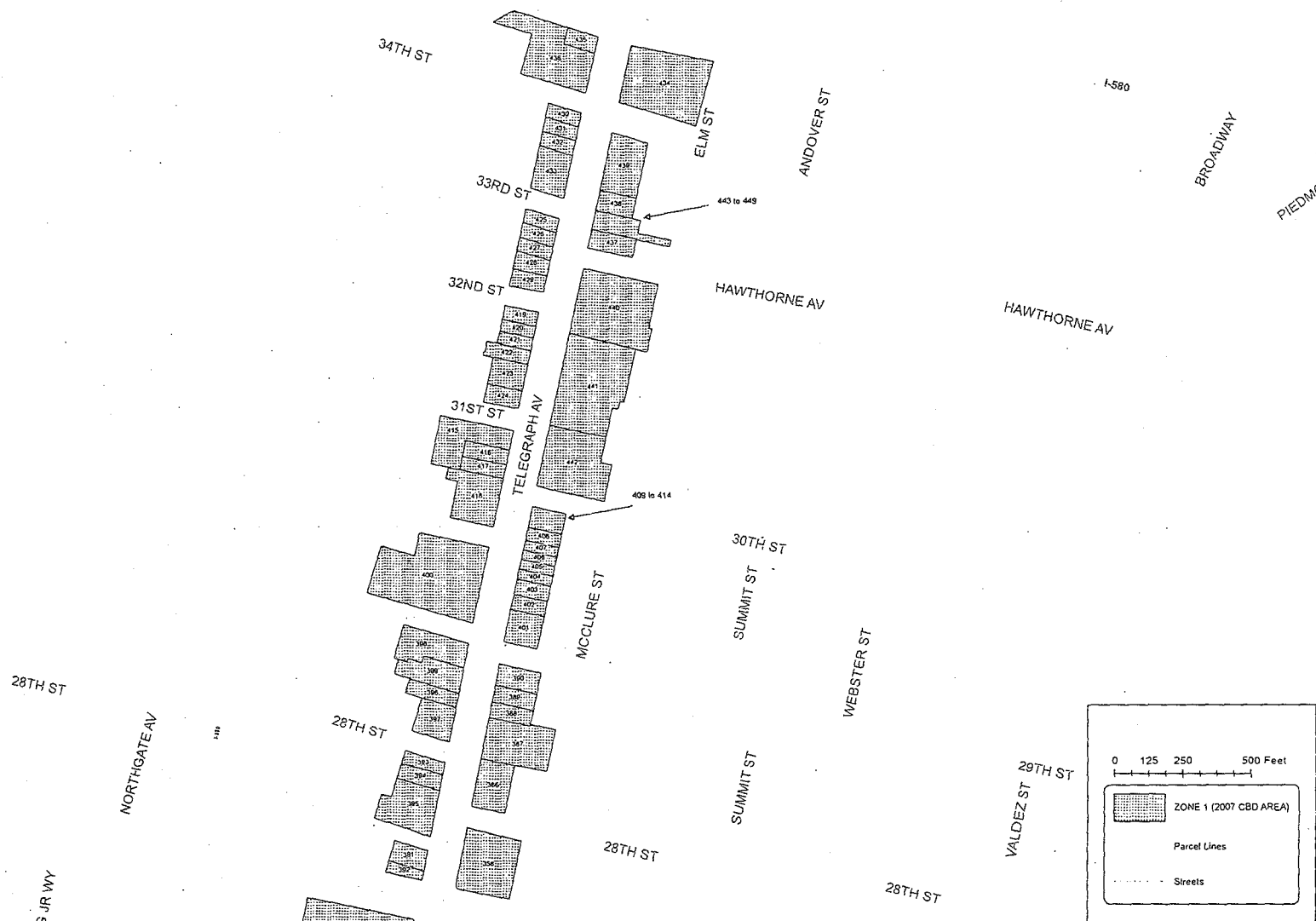
**CITY OF OAKLAND**



# BOUNDARIES OF KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017

CITY OF OAKLAND  
COUNTY OF ALAMEDA  
STATE OF CALIFORNIA

APN	Assessment ID	Zone
009-0684-029-04	358	1
009-0685-014-03	366	1
009-0686-015-00	387	1
009-0688-016-00	388	1
009-0688-017-00	389	1
009-0688-018-00	390	1
009-0689-021-00	391	1
009-0689-022-00	392	1
009-0690-001-00	393	1
009-0690-027-00	394	1
009-0690-035-01	395	1
009-0691-033-00	396	1
009-0691-034-00	397	1
009-0691-044-01	398	1
009-0691-049-00	399	1
009-0692-022-00	400	1
009-0692-012-01	401	1
009-0692-013-00	402	1
009-0692-014-00	403	1
009-0692-015-00	404	1
009-0692-016-00	405	1
009-0692-017-00	406	1
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009-0692-019-00	408	1
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009-0692-041-00	411	1
009-0692-042-00	412	1
009-0692-043-00	413	1
009-0692-044-00	414	1
009-0706-001-02	415	1
009-0706-022-00	416	1
009-0706-003-00	417	1
009-0706-004-00	418	1
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009-0746-045-00	444	1
009-0746-046-00	445	1
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009-0746-050-00	449	1

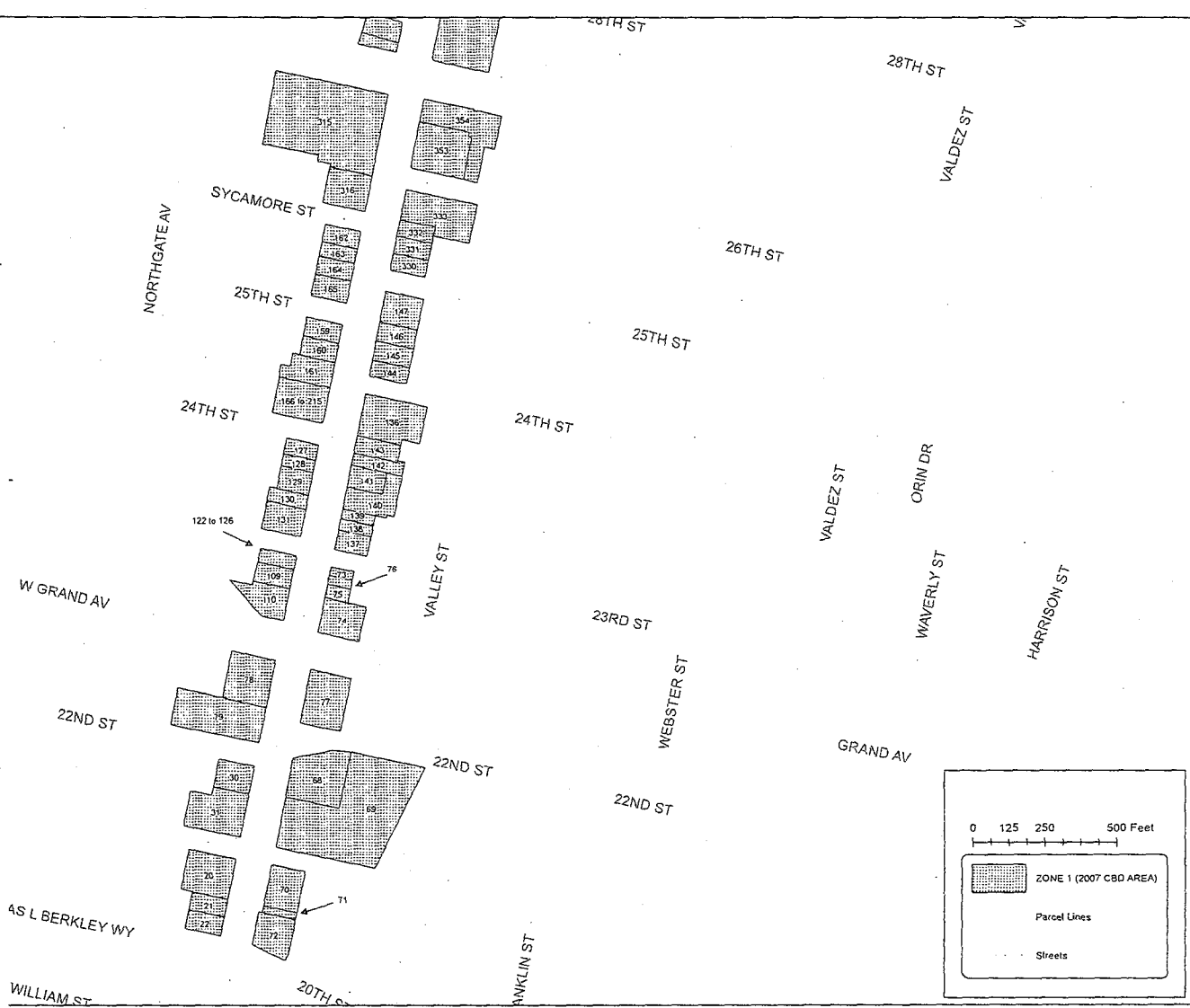


# BOUNDARIES OF KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017

CITY OF OAKLAND  
COUNTY OF ALAMEDA  
STATE OF CALIFORNIA

APN	Assessment ID	Zone
008-0645-001-02	20	1
008-0645-004-00	21	1
008-0645-005-00	22	1
008-0647-001-00	30	1
008-0647-002-00	31	1
008-0648-011-03	68	1
008-0648-015-03	69	1
008-0648-001-01	70	1
008-0648-001-02	71	1
008-0648-010-00	72	1
008-0658-001-00	73	1
008-0658-006-02	74	1
008-0658-007-00	75	1
008-0658-008-00	76	1
008-0658-009-01	77	1
008-0658-002-01	78	1
008-0659-003-02	79	1
008-0660-002-00	109	1
008-0660-003-05	110	1
008-0660-005-00	122	1
008-0660-006-00	123	1
008-0660-007-00	124	1
008-0660-008-00	125	1
008-0660-009-00	126	1
008-0664-001-00	127	1
008-0664-002-00	128	1
008-0664-004-01	129	1
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008-0665-012-00	137	1
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008-0665-014-00	139	1
008-0665-015-01	140	1
008-0665-016-03	141	1
008-0665-017-00	142	1
008-0665-018-00	143	1
008-0674-019-00	144	1
008-0674-020-00	145	1
008-0674-021-00	146	1
008-0674-022-01	147	1
008-0675-001-00	159	1
008-0675-002-00	160	1
008-0675-003-00	161	1
008-0675-001-00	162	1
008-0676-002-01	163	1
008-0676-002-02	164	1
008-0676-003-00	165	1
008-0688-001-00	166	1
008-0688-002-00	167	1
008-0688-003-00	168	1
008-0688-004-00	169	1
008-0688-005-00	170	1

APN	Assessment ID	Zone
008-0688-001-00	171	1
008-0688-002-00	172	1
008-0688-003-00	173	1
008-0688-004-00	174	1
008-0688-005-00	175	1
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008-0684-012-01	354	1

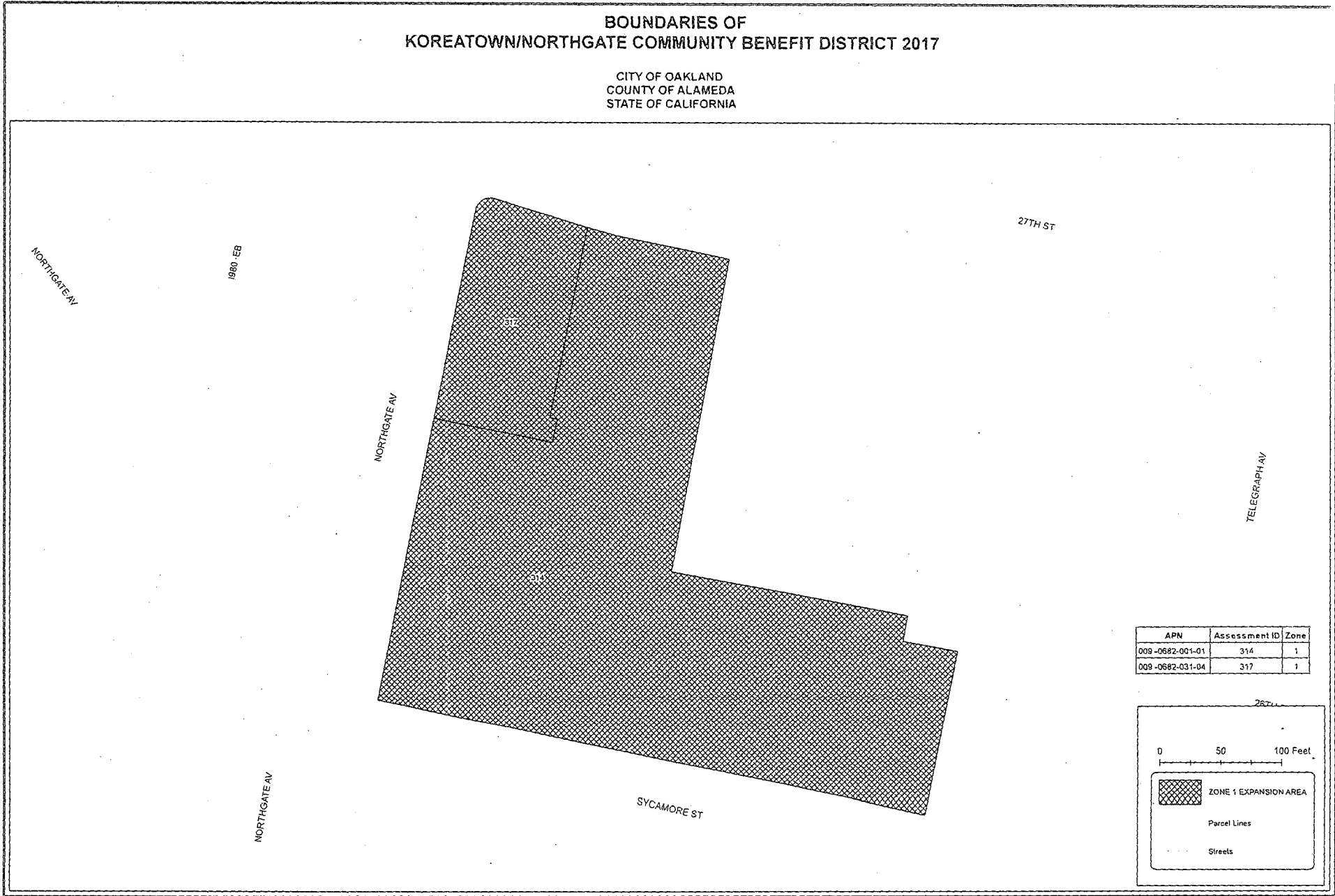


0 125 250 500 Feet

ZONE 1 (2007 CBD AREA)  
 Parcel Lines  
 Streets

**BOUNDARIES OF  
KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017**

CITY OF OAKLAND  
COUNTY OF ALAMEDA  
STATE OF CALIFORNIA



# BOUNDARIES OF KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017

CITY OF OAKLAND  
COUNTY OF ALAMEDA  
STATE OF CALIFORNIA

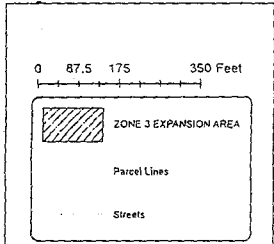
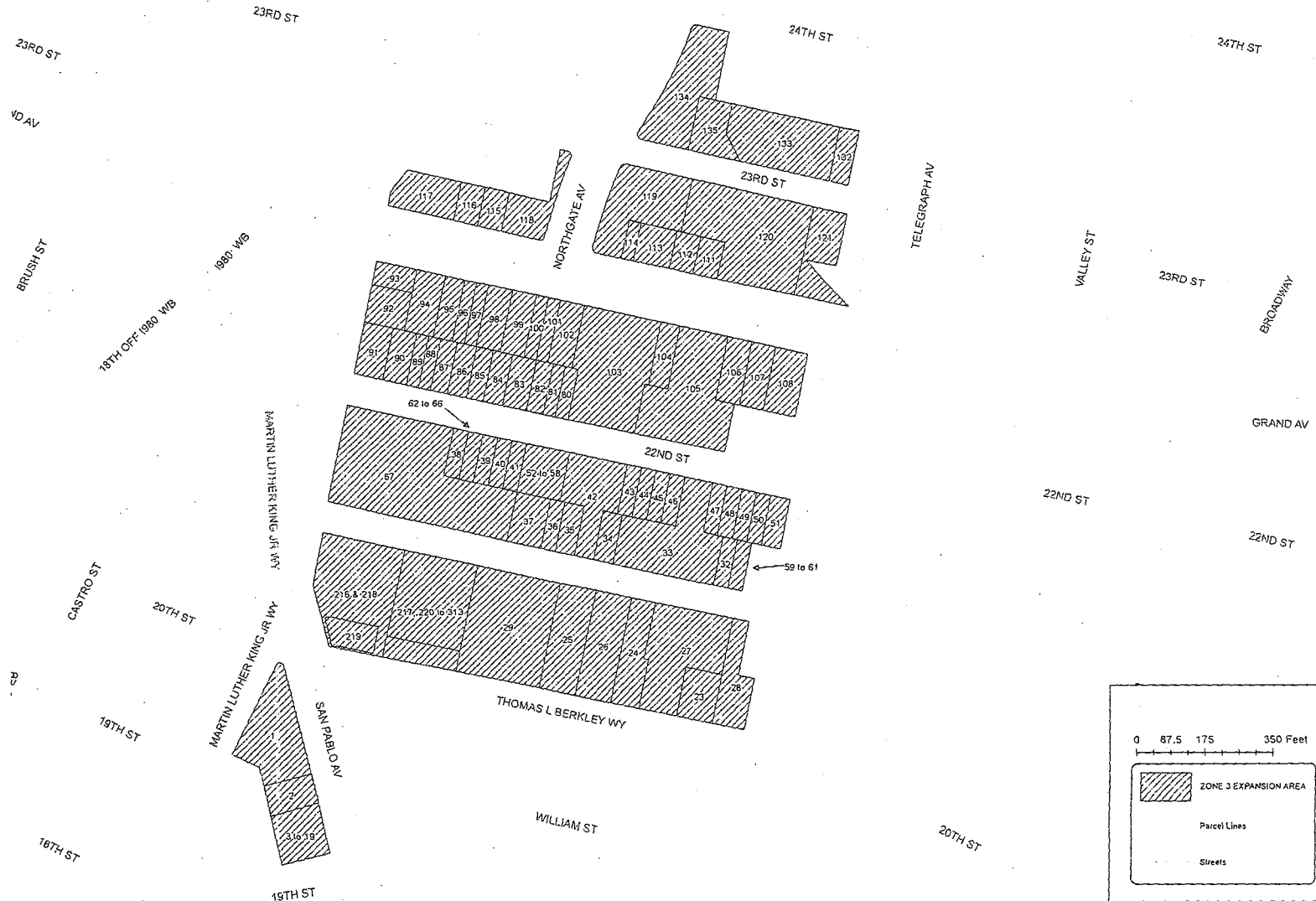
APN	Assessment ID	Zone
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008-0674-026-00	150	2
008-0674-027-00	151	2
008-0674-028-00	152	2
008-0674-029-00	153	2
008-0674-030-00	154	2
008-0674-031-00	155	2
008-0674-032-00	156	2
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008-0674-034-00	158	2
009-0683-004-00	218	2
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009-0683-008-02	221	2
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009-0683-065-00	277	2
009-0683-066-00	278	2
009-0683-067-00	279	2
009-0683-068-00	280	2



# BOUNDARIES OF KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017

CITY OF OAKLAND  
COUNTY OF ALAMEDA  
STATE OF CALIFORNIA

Parcel ID	Area	Parcel ID	Area
001-001-001	1	001-001-001	1
001-001-002	2	001-001-002	2
001-001-003	3	001-001-003	3
001-001-004	4	001-001-004	4
001-001-005	5	001-001-005	5
001-001-006	6	001-001-006	6
001-001-007	7	001-001-007	7
001-001-008	8	001-001-008	8
001-001-009	9	001-001-009	9
001-001-010	10	001-001-010	10
001-001-011	11	001-001-011	11
001-001-012	12	001-001-012	12
001-001-013	13	001-001-013	13
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001-001-017	17	001-001-017	17
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001-001-021	21	001-001-021	21
001-001-022	22	001-001-022	22
001-001-023	23	001-001-023	23
001-001-024	24	001-001-024	24
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**APPENDIX B – ASSESSOR'S PARCEL LISTING**







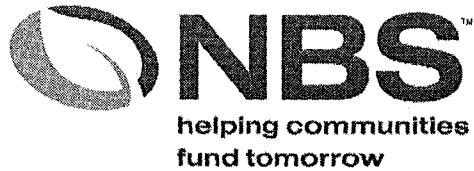




**KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017  
FY 2017/18 ASSESSMENT ROLL**

APN	Area	Site	Classification	Front Footage	Lot Area	Building Area	(B) Linear Factor	(C) Building Factor	(D) Total Benefit Points	(A) Total Special Benefit Points	Assessment
009-0684-047-00	Zone 2	425 28TH ST #201A	Residential	10	795.77	1,210	0.404	0.303	3,343	2,361	204.69
009-0684-048-00	Zone 2	425 28TH ST #201B	Residential	10	795.77	1,275	0.404	0.319	3,343	2,415	209.40
009-0684-049-00	Zone 2	425 28TH ST #202A	Residential	10	795.77	912	0.404	0.228	3,343	2,112	183.09
009-0684-050-00	Zone 2	425 28TH ST #202B	Residential	10	795.77	1,265	0.404	0.316	3,343	2,407	208.67
009-0684-051-00	Zone 2	425 28TH ST #203A	Residential	10	795.77	1,375	0.404	0.344	3,343	2,499	216.64
009-0684-052-00	Zone 2	426 27TH ST #203B	Residential	10	795.77	1,248	0.404	0.312	3,343	2,393	207.44
009-0684-053-00	Zone 2	426 28TH ST #204A	Residential	10	795.77	1,050	0.404	0.283	3,343	2,227	193.09
009-0684-054-00	Zone 2	425 28TH ST #204B	Residential	10	795.77	1,322	0.404	0.331	3,343	2,454	212.80
009-0684-055-00	Zone 2	425 28TH ST #205A	Residential	10	795.77	966	0.404	0.242	3,343	2,157	187.01
009-0684-056-00	Zone 2	425 28TH ST #205B	Residential	10	795.77	1,240	0.404	0.310	3,343	2,386	206.86
009-0684-057-00	Zone 2	425 28TH ST #206A	Residential	10	795.77	1,060	0.404	0.285	3,343	2,236	193.82
009-0684-058-00	Zone 2	425 28TH ST	Common Area	-	-	-	-	-	-	-	-
009-0688-014-03	Zone 1	2800 TELEGRAPH AVE	Non-Residential	245	14,501	2,524	9.801	0.631	5,000	52,159	4,522.12
009-0688-015-00	Zone 1	2850 TELEGRAPH AVE	Non-Residential	121	24,137	9,346	4.859	2.337	5,000	35,976	3,119.09
009-0688-016-00	Zone 1	2864 TELEGRAPH AVE	Non-Prof/ Public Property	45	5,491.46	3,984	1,800	0.991	1,001	2,794	242.23
009-0688-017-00	Zone 1	2870 TELEGRAPH AVE	Non-Residential	50	6,130	3,751	2,000	0.938	5,000	14,690	1,273.59
009-0688-018-00	Zone 1	2878 TELEGRAPH AVE	Non-Residential	184	7,395	9,484	7,345	2.371	5,000	48,578	4,211.69
009-0689-001-00	Zone 1	2719 TELEGRAPH AVE	Non-Residential	160	6,177	6,150	6,412	1.538	5,000	39,746	3,445.98
009-0689-002-03	Zone 1	2701 TELEGRAPH AVE	Non-Residential	135	3,274	2,605	5,391	0.651	5,000	30,212	2,619.35
009-0690-001-00	Zone 1	2781 TELEGRAPH AVE	Non-Residential	160	4,818	4,095	6,420	1.024	5,000	37,217	3,226.71
009-0690-002-00	Zone 1	2775 TELEGRAPH AVE	Non-Residential	46	5,818	4,050	1,841	1.013	5,000	14,269	1,237.07
009-0690-005-01	Zone 1	2757 TELEGRAPH AVE	Non-Residential	302	19,605	10,112	12,060	2.528	5,000	72,941	6,323.98
009-0697-003-00	Zone 1	2821 TELEGRAPH AVE	Non-Residential	43	6,524	7,436	1,727	1.859	5,000	17,932	1,554.73
009-0697-004-00	Zone 1	2811 TELEGRAPH AVE	Non-Residential	214	10,873	4,950	8,563	1.238	5,000	49,001	4,248.30
009-0697-044-01	Zone 1	525 29TH ST	Non-Prof/ Public Property	266	15,999.00	12,257	10,659	3.064	1,001	13,737	1,191.00
009-0697-049-00	Zone 1	2831 TELEGRAPH AVE	Non-Residential	74	12,422	7,414	2,941	1.854	5,000	23,972	2,078.38
009-0698-032-00	Zone 1	2935 TELEGRAPH AVE	Residential	755	60,674.80	212,785	30,208	53.196	4,076	339,957	29,473.98
009-0699-012-01	Zone 1	2914 TELEGRAPH AVE	Non-Residential	197	9,666	10,857	7,866	2.714	5,000	52,904	4,566.69
009-0699-013-00	Zone 1	2920 TELEGRAPH AVE	Undeveloped	45	4,500.00	-	1,800	-	0.689	1,240	107.53
009-0699-014-00	Zone 1	2928 TELEGRAPH AVE	Non-Residential	45	4,500	2,784	1,800	0.696	5,000	12,480	1,081.99
009-0699-015-00	Zone 1	2934 TELEGRAPH AVE	Non-Residential	30	3,000	5,220	1,200	1.305	5,000	12,525	1,085.90
009-0699-016-00	Zone 1	2940 TELEGRAPH AVE	Residential	30	2,999.99	2,784	1,200	0.698	4,076	7,728	670.02
009-0699-017-00	Zone 1	2948 TELEGRAPH AVE	Residential	29	2,850.03	2,846	1,140	0.712	4,076	7,547	654.30
009-0699-018-00	Zone 1	2950 TELEGRAPH AVE	Non-Residential	28	2,837	2,984	1,135	0.746	5,000	9,404	815.31
009-0699-019-00	Zone 1	2958 TELEGRAPH AVE	Non-Residential	38	3,850	3,386	1,540	0.847	5,000	11,932	1,034.53
009-0699-039-00	Zone 1	491 30TH ST #101	Non-Residential	32	1,202	1,729	1,282	0.432	5,000	8,571	743.10
009-0699-040-00	Zone 1	491 30TH ST #102	Non-Residential	32	1,202	1,729	1,282	0.432	5,000	8,571	743.10
009-0699-041-00	Zone 1	491 30TH ST #103	Non-Residential	32	1,202	1,729	1,282	0.432	5,000	8,571	743.10
009-0699-042-00	Zone 1	491 30TH ST #201	Non-Residential	32	1,202	1,729	1,282	0.432	5,000	8,571	743.10
009-0699-043-00	Zone 1	491 30TH ST #202	Non-Residential	32	1,202	1,729	1,282	0.432	5,000	8,571	743.10
009-0699-044-00	Zone 1	491 30TH ST	Common Area	-	-	-	-	-	-	-	-
009-0708-001-02	Zone 1	515 31ST ST	Non-Prof/ Public Property	277	20,178.20	13,177	11,064	3.294	1,001	14,373	1,246.13
009-0708-002-00	Zone 1	3031 TELEGRAPH AVE	Non-Residential	45	5,878	7,167	1,800	1.792	5,000	17,960	1,557.07
009-0708-003-00	Zone 1	3027 TELEGRAPH AVE	Residential	40	5,201.99	11,846	1,600	2.912	4,076	18,389	1,594.35
009-0708-004-00	Zone 1	3007 TELEGRAPH AVE	Non-Residential	268	19,147	10,843	10,716	2.711	5,000	67,134	5,820.43
009-0715-001-00	Zone 1	3147 TELEGRAPH AVE	Non-Residential	139	3,981	5,794	5,579	1.449	5,000	35,138	3,046.45
009-0715-002-00	Zone 1	3145 TELEGRAPH AVE	Residential	35	3,486.01	2,231	1,400	0.558	4,076	7,980	691.86
009-0715-003-00	Zone 1	3137 TELEGRAPH AVE	Residential	35	3,488.69	2,134	1,400	0.534	4,076	7,881	683.30
009-0715-004-00	Zone 1	3127 TELEGRAPH AVE	Residential	40	5,239.13	3,980	1,603	0.995	4,076	10,589	918.05
009-0715-005-00	Zone 1	3121 TELEGRAPH AVE	Residential	79	8,198.80	7,430	3,179	1.858	4,076	20,530	1,779.91
009-0715-006-00	Zone 1	3109 TELEGRAPH AVE	Non-Residential	157	5,594	8,688	6,299	2.172	5,000	42,354	3,672.01
009-0716-001-00	Zone 1	3239 TELEGRAPH AVE	Residential	141	4,052.49	4,111	5,658	1.028	4,076	27,252	2,382.72
009-0716-002-00	Zone 1	3231 TELEGRAPH AVE	Residential	43	4,356.32	5,392	1,726	1.348	4,076	12,530	1,086.36
009-0716-003-00	Zone 1	3223 TELEGRAPH AVE	Residential	40	4,052.43	4,130	1,606	1.033	4,076	10,753	932.31
009-0716-004-00	Zone 1	3217 TELEGRAPH AVE	Residential	45	5,084.75	2,474	1,816	0.619	4,076	9,924	860.41
009-0716-005-00	Zone 1	3207 TELEGRAPH AVE	Non-Residential	151	5,048	46,964	6,039	11.741	5,000	88,898	7,707.36
009-0726-001-00	Zone 1	3343 TELEGRAPH AVE	Undeveloped	141	4,113.22	-	5,658	-	0.689	3,898	337.99
009-0726-002-00	Zone 1	3333 TELEGRAPH AVE	Non-Residential	41	4,113	4,942	1,645	1.236	5,000	14,404	1,248.79
009-0726-003-00	Zone 1	3321 TELEGRAPH AVE	Non-Residential	42	4,234	6,118	1,693	1.530	5,000	16,115	1,397.13
009-0726-004-00	Zone 1	3315 TELEGRAPH AVE	Residential	225	12,411.80	22,102	8,988	5.526	4,076	59,157	5,128.86
009-0736-017-01	Zone 1	3407 ELM ST	Non-Residential	405	43,792	13,377	16,193	3.344	5,000	97,685	8,469.20
009-0737-051-00	Zone 1	3425 TELEGRAPH AVE	Residential	48	4,466.39	5,498	1,937	1.375	4,076	13,498	1,170.30
009-0737-052-00	Zone 1	3401 TELEGRAPH AVE	Non-Residential	319	32,516	21,606	12,756	5.402	5,000	90,788	7,871.19
009-0746-002-01	Zone 1	494 HAWTHORNE AVE	Non-Residential	200	7,473	4,050	7,994	1.013	5,000	45,034	3,904.37
009-0746-004-00	Zone 1	3300 TELEGRAPH AVE	Non-Residential	60	6,482	2,016	2,399	0.504	5,000	14,514	1,258.36
009-0746-006-01	Zone 1	3330 TELEGRAPH AVE	Non-Residential	278	17,639	9,716	11,047	2.429	5,000	67,378	5,841.59
009-0746-025-00	Zone 1	3200 TELEGRAPH AVE	Non-Residential	417	43,974	14,836	16,681	3.709	5,000	101,952	8,839.13
009-0746-026-00	Zone 1	3100 TELEGRAPH AVE	Non-Residential	271	50,508	54,829	10,853	13.707	5,000	122,803	10,646.89
009-0746-027-00	Zone 1	450 30TH ST	Non-Residential	384	34,242	3,337	15,351	0.834	5,000	80,927	7,016.32
009-0746-044-00	Zone 1	3240 TELEGRAPH AVE	Non-Residential	9	1,534	3,623	0.360	0.906	5,000	6,329	548.70
009-0746-045-00	Zone 1	3240 TELEGRAPH AVE	Residential	9	1,533.50	2,801	0.360	0.700	4,076	4,322	374.68
009-0746-046-00	Zone 1	3240 TELEGRAPH AVE	Residential	9	1,533.50	621	0.360	0.155	4,076	2,100	182.08
009-0746-047-00	Zone 1	3242 TELEGRAPH AVE	Non-Residential	9	1,534	882	0.360	0.221	5,000	2,903	251.64
009-0746-048-00	Zone 1	3244 TELEGRAPH AVE	Non-Residential	9	1,534	817	0.360	0.204	5,000	2,821	244.60
009-0746-049-00	Zone 1	3246 TELEGRAPH AVE	Non-Residential	9	1,534	1,256	0.360	0.314	5,000	3,370	292.18
009-0746-050-00	Zone 1	3240 TELEGRAPH AVE	Common Area	-	-	-	-	-	-	-	-
<b>TOTALS</b>										<b>6,412,580</b>	<b>\$555,964.74</b>

# ***APPENDIX C – ENGINEER'S REPORT***



## **Koreatown/Northgate Community Benefit District 2017**

### **Engineer's Report**

**April 2017, as Amended on May 9, 2017**

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# 1. ENGINEER'S LETTER

Pursuant to Chapter 4.48 of the City of Oakland (the "City") Municipal Code (the "Code"), it is proposed that the Koreatown/Northgate Community Benefit District 2017 (the "2017 CBD") be established. If established, assessments would be collected for up to 10 years (July 1, 2017 – June 30, 2027). Expenditure of those collected assessments can continue for up to six months after the end of the assessment collection period (December 31, 2027), at which point the 2017 CBD would then be terminated, if not renewed.

This Engineer's Report presents the plans and specifications describing the improvements, maintenance, and activities, an estimate of the costs of the improvements, maintenance, and activities for the 2017 CBD for the 2017/18 Fiscal Year. The Engineer's Report also includes a proposed boundary map showing the area and properties to be assessed, and an assessment of the estimated costs of the improvements, maintenance, and activities, assessing the net amount upon all assessable lots and/or parcels within the 2017 CBD in proportion to the special benefit received.

The following assessment is authorized in order to pay the estimated costs of the 2017 CBD improvements, maintenance and activities to be paid by the assessable real property within the boundaries of the 2017 CBD in proportion to the special benefit received. The following table summarizes the 2017 CBD assessment:

Description	Amount
<b>2017/18 Operating Costs:</b>	
Sidewalk Operations Program	\$357,500.00 <u>316,387.50</u>
Marketing and Identity Enhancement Program	97,500.00 <u>86,287.50</u>
Operating Reserve	32,500.00 <u>28,762.50</u>
<b>Total Operating Costs</b>	<b>\$487,500.00    \$431,437.50</b>
<b>Less: Contributions for General Benefit (4.47% of Total Operating Costs) <sup>1</sup></b>	<b>(\$21,791.25)    (\$19,285.26)</b>
<b>2017/18 Incidental Costs:</b>	
2017 CBD Administration Costs <sup>2</sup>	\$162,500.00 <u>143,812.50</u>
<b>Total Incidental Costs</b>	<b>\$162,500.00    \$143,812.50</b>
<b>Total 2017/18 Maximum Assessment: 2017 CBD Total Costs to be Assessed:</b>	<b>\$628,208.75    555,964.74</b>
Total 2017 CBD Special Benefit Points <sup>3</sup>	6,406.18 <u>6,412.58</u>
<b>2017/18 Maximum Allowable Assessment per Special Benefit Point</b>	<b>\$98.06293    \$86.69907</b>

1 Refer to Section 5 of this Engineer's Report for an explanation of General Benefit. The General Benefit percentage only applies to the Total Operating Costs, and not the Total Incidental Costs.

2 Includes costs of the City/Management staff, assessment engineering/administration, and County Auditor/Controller fees.

3 Refer to Section 5 of this Engineer's Report for an explanation of Total 2017 CBD Special Benefit Points.

The assessment methodology adheres to local and state laws. In making the assessments contained herein pursuant to the Code, Article XIID of the Constitution of the State of California and the Proposition 218 Omnibus Implementation Act, commencing with Section 53750 of the Government Code (collectively referred to as the "Assessment Law"):

1. I identified all parcels which will have a special benefit conferred upon them from the installation, implementation and maintenance of the improvements, maintenance, and activities described in Section 3.2 to this Engineer's Report (the "Specially Benefited Parcels"). For particulars as to the identification of said parcels, reference is made to the Proposed Boundary Map, a copy of which is included in Section 7 of this Engineer's Report.
2. I have assessed the costs and expenses to install, implement and maintain the improvements, maintenance, and activities upon the Specially Benefited Parcels. In making such assessment:
  - a. The proportionate special benefit derived by each Specially Benefited Parcel from the installation, implementation and maintenance of the improvements, maintenance, and activities was determined in relationship to the entirety of the costs;
  - b. No assessment has been imposed on any Specially Benefited Parcel which exceeds the reasonable cost of the proportional special benefit conferred on such parcel from the installation, implementation and maintenance of improvements, maintenance, and activities; and
  - c. Any general benefits from the installation, implementation and maintenance of improvements, maintenance, and activities have been quantified and separated from the special benefits and only special benefits have been assessed.

I, the undersigned, respectfully submit the enclosed Engineer's Report and, to the best of my knowledge, information and belief, the Engineer's Report, Assessments, and the Proposed Boundary Map herein have been prepared and computed in accordance with the Assessment Law.

By: \_\_\_\_\_  
John G. Egan  
Assessment Engineer  
R.C.E. 14853



## **2. INTRODUCTION**

### **2.1. Background of District**

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In 2007, property owners along Telegraph Avenue from 20th Street to Interstate 580, and the City of Oakland City Council (the City Council) approved the formation of the Koreatown/Northgate Community Benefit District of 2007 – a business improvement management district (BIMD), pursuant to the Code – for a ten-year operational term (the “2007 CBD”). Since formation, Koreatown Oakland, the nonprofit Koreatown/Northgate CBD Management Corporation (the “Management”) has been working with the community to provide special services that benefit property owners by providing a Sidewalk Operations Program and a Marketing and Identity Enhancement Program. In July 2017, property owners in the 2007 CBD, and other owners located in the proposed expanded boundaries, will be asked to establish the funding for services provided through the BIMD for a 10-year period. Based on the success of the prior BMID, property owners have shown support to establish the 2017 CBD with an expanded boundary and a revised assessment methodology.

As part of the assessment district formation process, this Engineer's Report has been prepared to support the establishment proceedings for the 2017 CBD.

### **2.2. Reason for the Assessment**

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Approval of the assessment covered by this Engineer's Report will generate the annual assessment revenue necessary to provide for the provision of the Sidewalk Operations Program and the Marketing and Identity Enhancement Program more fully described in Section 3.2. The 2017 CBD improvements, maintenance, and activities include all necessary services, operations and administration required to keep the 2017 CBD improvements in an operational and satisfactory condition, as well as provide for the ongoing maintenance and activities. The implementation and operations of the 2017 CBD improvements, maintenance, and activities shall also include material, equipment, capital improvements, and administrative costs associated with the annual administration and operation of the 2017 CBD.

### **2.3. Process for Establishing the Assessment**

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The City/Management cannot form the District and establish assessments without complying with the procedures specified in California Constitution Article XIID (part of Proposition 218). In November 1996, the voters in the State of California passed Proposition 218 which added Article XIID to the California Constitution imposing, among other requirements, the necessity to conduct an assessment ballot procedure to enable the owners of each property on which assessments are proposed to be imposed, the opportunity to express their support for, or opposition to, the proposed assessment. The basic steps of the assessment ballot procedure are outlined below.

The City/Management must prepare a Notice of Public Hearing (the “Notice”), which describes, along with other mandated information, the reason for the proposed assessments and provide a date, time and location of a public hearing to be held on the matter. The City/ Management must also prepare an assessment ballot, which clearly gives the property owner the ability to sign and execute their assessment ballot either in favor of, or in opposition to, the proposed assessment. The Notice and assessment ballot are mailed to each affected property owner within the 2017 CBD a minimum of 45 days prior to the public hearing date as shown in the Notice. The City/ Management may also hold community meetings with the property owners to discuss the issues facing the 2017 CBD and to answer property owner questions directly.

After the Notice and assessment ballot are mailed, property owners are given until the close of the public hearing, as stated in the Notice, to return their signed and executed assessment ballot. During the public hearing, property owners are given the opportunity to address the City Council and ask questions or voice their concerns. After the public hearing, the returned assessment ballots received prior to the close of the public hearing are tabulated, weighted by the proposed assessment amount on each property and the results are announced by the City Council.

Article XIID provides that if, as a result of the assessment ballot proceeding, a majority protest is found to exist, the City Council shall not have the authority to enact the assessments as proposed. A majority protest exists if the assessments represented by weighted ballots submitted in opposition exceed those weighted ballots submitted in favor of the assessment. All returned ballots are tabulated and weighted according to the financial obligation of each particular parcel, in relation to the total proposed assessments. If there is no majority protest as described above, the City Council may approve the 2017 CBD formation and levy the assessments.

### **3. PLANS AND SPECIFICATIONS**

The 2017 CBD will provide for the ongoing provision of a sidewalk operations program and a marketing and identity enhancement program, and management activities all located within the boundaries of the 2017 CBD.

#### **3.1. Description of the Boundaries of the District**

The 2017 CBD is proposed to provide ongoing funding for a sidewalk operations program and a marketing and identity enhancement program. The proposed 2017 CBD is located within the portions of the City's neighborhoods of Pill Hill, Northgate, San Pablo Gateway, and Downtown Oakland. More specifically, the proposed 2017 CBD boundaries include property in three Benefit Zones, described below:

##### **Benefit Zone 1 (Telegraph Avenue)**

Property fronting Telegraph Avenue from 20<sup>th</sup> Street to Interstate 580, plus the parking structure west of Telegraph Avenue between Sycamore Street and 27<sup>th</sup> Street. The properties included in this Benefit Zone are the same as for the 2007 CBD, except for the addition of said parking structure. There are 173 properties, 17,171 linear front feet, and 1,412,384 building square feet within Benefit Zone 1.

##### **Benefit Zone 2 (Art Zone Expansion Area)**

Property along 25<sup>th</sup> Street from Telegraph Avenue to Broadway (but not including those parcels fronting Broadway), 26<sup>th</sup> Street from Telegraph Avenue to Broadway, and the north side of 27<sup>th</sup> Street from Telegraph Avenue to Broadway. This does not include any property fronting Telegraph included within Benefit Zone 1. This Benefit Zone adds 72 properties, 4,830 linear front feet, and 399,625 building square feet to the 2017 CBD as compared to the 2007 CBD.

##### **Benefit Zone 3 (Downtown West Expansion Area)**

Property along the north side of 20<sup>th</sup> Street from Telegraph Avenue to San Pablo Avenue, 21<sup>st</sup> Street from Telegraph Avenue to San Pablo Avenue, 22<sup>nd</sup> Street from Telegraph Avenue to Martin Luther King, Jr. Way, West Grand Avenue from Telegraph Avenue to Martin Luther King, Jr. Way, 23<sup>rd</sup> Street from Telegraph Avenue to Northgate Avenue, and the west side of San Pablo Avenue from 19<sup>th</sup> Street to 20<sup>th</sup> Street. This does not include any property fronting Telegraph included within Benefit Zone 1. This Benefit Zone adds 204 properties, 8,511 linear front feet, and 962,707 building square feet to the 2017 CBD as compared to the 2007 CBD.

Section 7 of this Engineer's Report provides a Proposed Boundary Map that more fully provides a description of the 2017 CBD's boundaries.

#### **3.2. Description of the Improvements, Maintenance, and Activities**

The installation, implementation and maintenance of the improvements, maintenance, and activities are provided throughout the 2017 CBD only, and are of direct and special benefit to the parcels within the 2017 CBD.

## **Sidewalk Operations Program**

The 2017 CBD plans to implement a comprehensive program that aims to ensure the maximum possible cleanliness of sidewalks, curbs, fixtures, and buildings throughout the 2017 CBD boundaries. Through the utilization of managed services, the Sidewalk Operations Program will strive for a clean and litter-free area that significantly reduces graffiti or other signs of decay. The goal is for property owners, merchants, and residents alike to maintain a sense of pride throughout the 2017 CBD area. Cleanliness is crucial to the growth of an aesthetically pleasing and vibrant community.

The 2017 CBD's Sidewalk Operations Program includes regular sidewalk and gutter sweeping, scheduled steam cleanings, refuse removal, graffiti removal, and streetscape improvements. The following sidewalk operations will be carried out:

### Benefit Zone 1 (Enhanced Level of Service)

- Regular sidewalk and gutter sweeping – six times per week
- Sidewalk steam cleaning – two times per year
- Reporting and removal of illegal dumping – as needed; assessed daily
- Reporting and removal of graffiti – within 24-48 hours
- Weed removal from tree wells, frontage of buildings, gutters, and sidewalks – monthly
- Beautification and streetscape improvements
- Private security patrol officer – as needed
- ~~Installation and use of closed circuit television (CCTV)~~
- Reporting of incidents of crime to the City

### Benefit Zones 2 and 3 (Base Level of Service)

- Regular sidewalk and gutter sweeping – three times per week
- Sidewalk steam cleaning – one time per year
- Reporting and removal of illegal dumping – as needed; assessed daily
- Reporting and removal of graffiti – within 24-48 hours
- Weed removal from tree wells, frontage of buildings, gutters, and sidewalks – monthly
- Beautification and streetscape improvements
- Private security patrol officer – as needed
- ~~Installation and use of CCTV~~
- Reporting of incidents of crime to the City

## **Marketing and Identity Enhancement (MIE) Program**

In order to promote the unique character of the 2017 CBD area, the 2017 CBD will implement a Marketing and Identity Enhancement Program.

The Marketing and Identity Enhancement Program will promote the 2017 CBD's properties and businesses through specially targeted programs and initiatives. In addition, these activities will contribute to the economic and social vitality of the area, and help with the recruitment and retention of businesses and other entities. 2017 CBD stakeholders view marketing activities as especially useful and necessary during a time of economic downturn, and to help the area stabilize itself and grow during prosperous economic times.

The 2017 CBD will also support the creation and production of special events that draw visitors into the 2017 CBD as a means of additional exposure, including the First Friday event not to exceed amounts indicated in the below MIE budget category. The First Friday event and the 2017 CBD shall also remain separate legal entities and there shall be no co-mingling of funds between the First Friday event and the 2017 CBD.

The 2017 CBD will program special events and conduct marketing activities in various parts of the 2017 CBD. The 2017 CBD marketing and promotion services will make sure new visitors, employees, patrons, and residents know about area attractions and will help them enjoy their experience in the 2017 CBD. The 2017 CBD plans to include other marketing initiatives, as appropriate, and as budget resources allow.

In addition, the 2017 CBD will promote the 2017 CBD as a clean, safe, and vibrant area for businesses, visitors, and residents, while also supporting business growth.

The Marketing and Identity Enhancement Program will carry out the following tasks:

Benefit Zones 1 and 2 (Enhanced Level of Service)

- Special and retail events – including the Oakland First Friday event, as described above
- Maintenance and updating of the 2017 CBD website
- Advertising for businesses within the 2017 CBD
- Communications
- Business attraction/retention

Benefit Zone 3 (Base Level of Service)

- Maintenance and updating of the 2017 CBD website
- Advertising for businesses within the 2017 CBD
- Communications
- Business attraction/retention

**Management and Operations**

In addition to the costs to maintain and service the 2017 CBD improvements mentioned above, the City/ Management will incur costs for staff time and expense related to the programs mentioned above, as well as the administration of the 2017 CBD. Staff time includes oversight and coordination of both City/ Management and contractor provided services, annual tax roll preparation, and addressing property owner questions and concerns. These activities are directly related to the 2017 CBD and improvements within the 2017 CBD, and without them the improvements could not be efficiently completed or properly maintained on an ongoing basis.

## 4. ESTIMATE OF COSTS

The estimated costs of installation, implementation and maintenance of the 2017 CBD improvements, maintenance, and activities as described in Section 3 are outlined below. Each year, as part of the 2017 CBD assessment levy calculation process, the costs and expenses are reviewed and the annual costs are projected for the following fiscal year.

### 4.1. Cost Estimate Budget

The estimated cost budget for the first operating year of the 2017 CBD (January 1, 2018 through December 31, 2018) is as follows:

Description	Amount
Sidewalk Operations Program	\$357,500.00 316,387.50
Marketing and Identity Enhancement Program	97,500.00 86,287.50
Operating Reserve	32,500.00 28,762.50
2017 CBD Administrative Costs	162,500.00 143,812.50
<b>Total 2017/18 Cost Estimate Budget</b>	<b>\$650,000.00 \$575,250.00</b>

The 2018 estimated operating budget will be funded as follows:

Description of Revenue Source	2017/18 Revenue Amount
Assessment Revenue	\$628,208.75 555,964.74
Contributions for General Benefit (4.47% of Total Operating Costs) <sup>1</sup>	21,791.25 19,285.26
<b>Total 2017/18 Annual Revenue</b>	<b>\$650,000.00 575,250.00</b>

<sup>1</sup> Comprised of additional funds generated from sources other than assessments. Refer to Section 5 of this Engineer's Report for an explanation of General Benefit. The General Benefit percentage only applies to the Total Operating Costs, and not the Total Incidental Costs, as noted in Section 1 of this Engineer's Report.

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## **5. SPECIAL AND GENERAL BENEFIT**

### **5.1. Introduction**

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Pursuant to Article XIID, all parcels that receive a special benefit conferred upon them as a result of the public improvements and services shall be identified, and the proportionate special benefit derived by each identified parcel shall be determined in relationship to the entire costs of the project.

Article XIID, Section 4(a) of the California Constitution limits the amount of any assessment to the proportional special benefit conferred on the property. Article XIID also provides that publicly owned properties within an assessment district must be assessed unless there is clear and convincing evidence that those properties receive no special benefit from the assessment. Examples of parcels which might be exempted from the assessment would be the areas of public streets, public avenues, public lanes, public roads, public drives, public courts, public alleys, public easements and rights-of-ways, public greenbelts and public parkways. At this time, there are no parcels within the district that would be exempt from the assessment.

Furthermore, Article XIID requires that the City/Management separate the general benefit from special benefit, so that only the special benefit may be assessed.

### **5.2. Identification of Benefit**

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The ongoing maintenance, servicing, and operation of the 2017 CBD improvements, maintenance, and activities will provide benefits to both those properties within the boundary of the 2017 CBD and to the community as a whole. The benefit conferred to property within the 2017 CBD can be grouped into three primary benefit categories: improved aesthetics, increased safety, and increased economic activity. The three 2017 CBD benefit categories are further expanded upon in each section below. This report does not consider any general enhancement of property value.

#### **Improved Aesthetics**

Aesthetics is a primary component of livability. Livability encompasses several qualities and characteristics that are unique to a specific area. The Victoria Transport Policy Institute (2011) expands on the concept of livability and the various benefits associated with that designation:

*"The livability of an area increases property desirability and business activity. Livability is largely affected by conditions in the public realm, places where people naturally interact with each other and their community, including streets, parks, transportation terminals and other public facilities. Livability also refers to the environmental and social quality of an area as perceived by employees, customers and visitors. This includes local environmental conditions, the quality of social interactions, opportunities for recreation and entertainment, aesthetics, and existence of unique cultural and environmental resources."*

The maintenance and servicing of the improvements increase the aesthetics, appearance, and desirability for properties within the proposed boundaries of the 2017 CBD.

#### **Sidewalk Operations Program:**

The sidewalk services, trash services, graffiti abatement, and beautification activities will enhance the overall image and desirability of the properties within the 2017 CBD.

Uniform and well-maintained improvements, maintenance, and activities will create cohesion throughout the 2017 CBD. This cohesion will enhance the retail and residential experience as well as encourage maximum use of building and lot area. A uniform maintenance management program will allow for consistent and reliable maintenance throughout the 2017 CBD boundaries.

Upgraded sidewalk amenities and other improvements, maintenance, and activities will enhance the appearance, desirability and "livability" of the property directly fronting the improvements provided throughout the 2017 CBD.

Regular maintenance ensures that the sidewalk improvements do not reach a state of deterioration or disrepair so as to be materially detrimental to properties adjacent to or in close proximity to the improvements within the proposed 2017 CBD. According to the Victoria Transport Policy Institute (2011), streetscapes have a significant effect on how people view and interact with their community. With streetscapes that are safe and inviting, people are more likely to walk, which can help reduce automobile traffic, improve public health, stimulate local economic activity and attract residents and visitors to the community.

Maintained sidewalks will enhance the community identity of the 2017 CBD, which will lead to a stronger and healthier corridor. The overall appeal of the 2017 CBD is enhanced when improvements are in place and kept in a healthy and satisfactory condition. Conversely, appeal decreases when improvements are not well-maintained, unsafe, or destroyed by the elements or vandalism.

### **Increased Safety**

The maintained 2017 CBD improvements and services, the presence of security cameras dedicated to the 2017 CBD, and on-site security patrols, will provide an increased level of safety to the property, businesses, residents, and visitors to the 2017 CBD.

#### Sidewalk Operations Program:

The maintained sidewalk improvements will provide an increased level of safety to the property, businesses, residents, and visitors to the 2017 CBD. Convenient and safe pedestrian access is a critical component to link the 2017 CBD with other areas of the City. The sidewalk cleaning activities will provide for clear and safe access to and from 2017 CBD properties, as well as provide for safe pedestrian passage throughout the 2017 CBD. An ongoing and reliable sidewalk cleaning program that provides for continuously cleared sidewalks will minimize the number of future trip-and-fall occurrences potentially occurring along sidewalk in front of property within the 2017 CBD.

Well-maintained and clean sidewalks provide a separation between vehicle and pedestrian as well as property and pedestrian, which provides a safety benefit for both property and pedestrian. The U.S. Department of Transportation Federal Highway Administration (FHWA, n.d.) notes that annually, around 4,500 pedestrians are killed in traffic crashes with motor vehicles in the United States. Pedestrians killed while "walking along the roadway" account for almost 8 percent of those deaths. Providing safe walkways separated from the travel lanes could help to prevent up to 88 percent of these "walking along roadway" crashes.

Safety for pedestrians also involves a degree of protection from criminal activity. Well-maintained and well-monitored areas mitigate crime, including vandalism, and enhance pedestrian safety.

### **Increased Economic Activity**

Operational and well-maintained improvements assist in making business property more prosperous. Well-maintained and safe 2017 CBD areas will encourage an increase in the overall pedestrian activity.



### Sidewalk Operations Program:

Year-round maintained access will increase customer visitation, attract additional investment in the area, and will spur economic activity. The maintained 2017 CBD improvements not only add economic value to property adjacent to the improvements, but the improvements make the property appear more stable and prosperous. The National Complete Streets Coalition (NCSC, n.d.) notes that street design that is inclusive of all modes of transportation, where appropriate, not only improves conditions for existing businesses, but also is a proven method for revitalizing an area and attracting new development. Washington, DC's Barracks Row was experiencing a steady decline of commercial activity due to uninviting sidewalks, lack of streetlights, and speeding traffic. After many design improvements, which included new patterned sidewalks, more efficient public parking, and new traffic signals, Barrack's Row attracted 44 new businesses and 200 new jobs. Economic activity on this three-quarter mile strip (measured by sales, employees, and number of pedestrians) has more than tripled since the inception of the project.

Well-monitored areas mitigate crime, especially vandalism, and enhance pedestrian safety, which will encourage an increase in the overall pedestrian activity. The 2017 CBD area will become more pedestrian friendly, thus improving the retail environment by encouraging individuals to shop, dine, and stay within the 2017 CBD boundaries.

### Marketing and Identity Enhancement Program

The Marketing and Identity Enhancement Program aims to the increase current economic activity and future property development potential within the 2017 CBD. The 2017 CBD will provide a comprehensive marketing plan that will seek to promote 2017 CBD properties, as well as attract, retain, and expand the retail and business climate throughout the 2017 CBD.

The enhanced marketing activities range from special events such as First Fridays Festivals to the development of public relations and marketing materials. The 2017 CBD will promote businesses through the Internet, social media, and cooperative advertising campaigns and will also develop and distribute business directories, and other 2017 CBD brochures. The 2017 CBD will market itself to potential businesses in an effort to reduce vacancies, provide a good mix of businesses, and strengthen the 2017 CBD.

These activities will encourage new non-residential property development, as well as encourage existing property owners to renovate and/or expand to the highest and best use of the property. This marketing effort will reduce vacancy rates and increase lease rates and utilization of property within the 2017 CBD.

## ***5.3. Separation of General Benefit***

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Section 4 of Article XIID of the California Constitution provides that once a local agency which proposes to impose assessments on property has identified those parcels that will have special benefits conferred upon them and upon which an assessment will be imposed, the local agency must next "separate the general benefits from the special benefits conferred," and only the special benefits can be included in the amount of the assessments imposed.

General benefit is an overall and similar benefit to the public at large resulting from the installation, implementation and maintenance of 2017 CBD improvements, maintenance, and activities to be provided by the assessments levied. The installation, implementation, and maintenance of assessment funded 2017 CBD improvements, maintenance, and activities provided by the 2017 CBD will be located within the 2017 CBD boundaries only. There will be no installation, implementation, and maintenance of assessment funded 2017 CBD improvements, maintenance, and activities located outside of the 2017 CBD boundaries.

The ongoing installation, implementation and maintenance of 2017 CBD improvements, maintenance, and activities will provide aesthetic, safety, and economic benefits to the property within the 2017 CBD. However, it is recognized that the ongoing installation, implementation, and maintenance of 2017 CBD improvements, maintenance, and activities will also provide a level of benefit to some property and businesses within proximity to the 2017 CBD, as well as visitors and individuals passing through the 2017 CBD. Pedestrian traffic from property within and outside of the 2017 CBD, as well as individuals passing through the 2017 CBD area, will be able to utilize the safe and maintained sidewalks and to not only access property located within the 2017 CBD, but also property located within close proximity outside of the 2017 CBD. Therefore, the general benefit created as a result of the 2017 CBD improvements, maintenance, and activities has been considered.

#### **5.4. Quantification of General Benefit**

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In order for property within the 2017 CBD to be assessed only for that portion of special benefit received from the 2017 CBD improvements, maintenance, and activities, the general benefit provided by the ongoing improvements, maintenance, and activities needs to be quantified. The amount of general benefit that is provided from the 2017 CBD improvements, maintenance, and activities cannot be funded via property owner assessments within the 2017 CBD.

The 2017 CBD consists of a variety of property land uses, including 94 residential parcels, and approximately 135 acres used for non-residential purposes, including public, non-profit, and undeveloped property. Properties within the 2017 CBD are classified to a land use category according to the assigned land use code as shown on the County Assessor's latest secured property tax roll.

##### **General Benefit: Improved Aesthetics, Increased Safety and Economic Activity from Sidewalk Operations Program**

As a result of the 2017 CBD improvements, maintenance, and activities, there will be a level of general benefit to pedestrians and others who do not live in or intend to access property within the 2017 CBD. There will be pedestrian traffic generated from property outside of the 2017 CBD that will utilize the maintained sidewalks in order to pass through the 2017 CBD and access property located outside of the 2017 CBD boundaries. In addition to accessing property located outside of the 2017 CBD, there will also be a level of pedestrian activity that will utilize the maintained sidewalks for leisure and fitness activities. Pedestrians will incorporate the maintained and safe sidewalks into their leisure and fitness routines, thus making the 2017 CBD sidewalks serve as a pass through portion of their overall route traveled. The benefit provided to property and pedestrians, as a result of the maintained sidewalks serving as a pass through corridor, needs to be quantified.

People walk for a variety of reasons, whether the reason is to commute to work, run errands, shop, perform leisure activities, fitness, or some other purpose. To enhance the overall walking experience, pedestrians will seek out and utilize sidewalk facilities that provide a safe place to walk as well as an environment that provides a certain amount of visual interest. In 2015, the Alameda County Transportation Commission (ACTC) published its *Comprehensive Circulation Study (CCS) for Downtown Oakland and Access to/from West Alameda* (ACTC, 2015), which included detail about how people travel in Downtown Oakland. The study showed that approximately 18% of trips in the study area occur by walking. The boundaries of the proposed 2017 CBD lie completely within the CCS study area.

Oakland is comprised of many neighborhoods located throughout the City. Portions of the 2017 CBD's boundary lie within the boundaries of the neighborhood areas identified as Pill Hill, Northgate, Downtown Oakland, and San Pablo Gateway. However, to capture a better understanding of the pedestrian traffic that may utilize the sidewalks within the 2017 CBD to access adjacent neighborhoods, the neighborhoods of Oakland Avenue/Harrison Street and Waverly were also considered in the analysis. Neighborhoods west of the 2017 CBD area were not considered because Interstate 980 creates a barrier that does not encourage pedestrian crossings. Neighborhoods north

of the 2017 CBD area were also not considered for the same reason, due to the barrier created by Interstate 580 at the northern end of the 2017 CBD. Applying the ACTC study data of 18% of trips, where the typical travel mode of transportation was walking, to each of the neighborhood population sets, approximately 2,930 people within proximity of the 2017 CBD utilize walking as their typical mode of transportation. The table below provides the number of persons per neighborhood that would utilize walking as the typical mode of transportation:

Neighborhood	Neighborhood Population (1)	Population w/Walking as Typical Mode of Transportation (2)
Pill Hill	2,003	361
Northgate	1,754	316
Downtown Oakland	3,784	681
San Pablo Gateway	2,298	414
Oakland Avenue/Harrison Street	5,439	979
Waverly	993	179
<b>Totals:</b>	<b>16,271</b>	<b>2,930</b>

- (1) Data derived from the United States Census Bureau, as compiled by www.areavibes.com.  
(2) Population multiplied by 18%.

To further identify the non-2017 CBD population within close proximity of the 2017 CBD, the population residing within the 2017 CBD needs to be quantified and excluded from the total walking population figure of 2,930. According to statistics compiled by the United States Census Bureau, the average persons per household within the City is approximately 2.53. Based on this average household size and the 1,292 residential units within the 2017 CBD, 3,269 people reside within the 2017 CBD boundaries. Applying the ACTC's study walking travel mode percentage of 18% to the 2017 CBD population, 588 people within the 2017 CBD boundaries use walking as their primary mode of transportation. Therefore, the adjusted total surrounding neighborhood area population, located outside of the 2017 CBD boundaries, that uses walking as the primary mode of transportation is 2,342 people.

Neighborhood	Population	Population w/Walking as Typical Mode of Transportation (1)
Pill Hill	2,003	361
Northgate	1,754	316
Downtown Oakland	3,784	681
San Pablo Gateway	2,298	414
Oakland Avenue/Harrison Street	5,439	979
Waverly	993	179
<b>Sub-totals:</b>	<b>16,271</b>	<b>2,930</b>
Less 2017 CBD Boundary Population	(3,269)	(588)
<b>Non-2017 CBD Totals:</b>	<b>13,002</b>	<b>2,342</b>

- (1) Population multiplied by 18%.

However, in order to obtain a better picture of the overall level of general benefit provided by the 2017 CBD improvements, maintenance, and activities, the pedestrian traffic that utilizes walking as the typical mode of transportation that will seek out and use sidewalks within the 2017 CBD's boundaries to access property outside of the 2017 CBD's boundaries must be considered.

The Summary of Travel Trends, 2009 National Household Travel Survey (NHTS) prepared by the U.S. Department of Transportation Federal Highway Administration (FHWA, 2011) analyzed the number of person trips by various modes of transportations such as private vehicle, transit, walking, or some other means of transportation. According to the Urban Area data extracted from the 2009

NHTS database, of the annual 31,966 (in millions) total person trips made using walking as the primary mode of transportation (FHWA, 2011), 27.31% of the trips were identified as social, recreational, and other activities not provided within the boundaries of the 2017 CBD.

Trip Purpose	Number of Walking Trips (in millions)
Transporting Someone	2.35%
Social/Recreational	23.47%
Don't Know/Other	1.49%
<b>Total</b>	<b>27.31%</b>

Applying this percentage of non-2017 CBD related activity to the non-2017 CBD surrounding population of 2,342 that utilizes walking as the typical mode of transportation, 640 people use the maintained 2017 CBD improvements to engage in general benefit activity.

Description	Population
Non-2017 CBD population utilizing walking as the typical mode of transportation	2,342
% of NHTS study trips representing activities outside of the 2017 CBD	27.31%
Non-2017 CBD population engaging in general benefit activities	640

The number of persons engaging in general benefit activities represents 3.93% of the total neighborhood population of 16,271, previously identified above, and is therefore considered to be general benefit.

<b>Sidewalk Operations Program General Benefit</b>	<b>3.93%</b>
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Therefore, the general benefit provided by the Sidewalk Operations Program is 3.93%, and the special benefit from the Sidewalk Operations Program is 96.07%.

**General Benefit: Improved Economic Activity from Marketing and Identity Enhancement Program**

Although the Marketing and Identity Enhancement Program is designed to specifically highlight the 2017 CBD, and market businesses and special events within it, one can imagine a degree of spillover benefits accruing to non-2017 CBD businesses that operate near the boundaries of the 2017 CBD. As expressed by the Appellate Court in *Beutz v. County of Riverside* (2010), "... courts of this state have long recognized that virtually all public improvement projects provide general benefits."

Marketing efforts of the 2017 CBD, including the enhanced marketing activities on behalf of the City's First Fridays event, will invariably draw shoppers and diners to the 2017 CBD, who are also likely to explore the broader area and patronize businesses outside the boundary of the 2017 CBD. In lieu of a detailed study showing what effects the marketing efforts of the 2017 CBD have on nearby businesses not within the 2017 CBD, we liberally estimate the general benefit resulting from the Marketing and Identity Enhancement Program to be 5.00%. Therefore, the special benefit is estimated to be 95.00%.

<b>Marketing and Identity Enhancement Program General Benefit</b>	<b>5.00%</b>
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## Collective 2017 CBD-wide General Benefit

Since the 2017 CBD is comprised of improved aesthetics, increased safety, and economic activity benefits resulting from a blend of improvements and activities, the general benefit must be addressed in a collective form rather than independently. Therefore, the average of the general benefit percentages has been used to quantify the overall level of general benefit for the 2017 CBD. This general benefit result is provided in the table below:

Sidewalk Operations Program	3.93%
Marketing and Identity Enhancement Program	5.00%
<b>2017 CBD General Benefit</b>	<b>4.47%</b>

The general benefit, which is the percentage of the total budget, excluding 2017 CBD administrative costs, that must be funded through sources other than assessments, is 4.47%. The special benefit then, which is the percentage of the budget that may be funded by assessments, is 95.53%.

## 5.5. Apportioning of Special Benefit

As outlined in Section 5.2, each of the parcels within the 2017 CBD receives a special benefit from the improvements. Each parcel that has a special benefit conferred upon it, as a result of the maintenance and operation of improvements, is identified and the proportionate special benefit derived by each identified parcel is determined in relationship to the entire costs of the maintenance and operation of the improvements.

The total costs of maintenance and operation, less the amount of general benefit identified, will be assessed to the parcels within the 2017 CBD based on the benefit points assigned to each parcel. To assess special benefit appropriately, it is necessary to relate parcels of different land uses, location, and proximity to improvements.

### Improved Aesthetics and Safety Benefit Points

Benefit points are assigned based upon not only the property's location to the 2017 CBD improvements, maintenance, and activities, but also the property's existing land use designation and pedestrian traffic associated with those different land uses. Those property land uses that are more likely to generate and attract activity receive a greater benefit from the 2017 CBD's improvements, maintenance, and activities when compared to those properties that do not generate as much traffic. These clean and safe areas create an aesthetically pleasing and safe environment for 2017 CBD properties, and those individuals utilizing 2017 CBD property, whether it is to shop, dine, live, utilize services, or visit.

In order to recognize the varying levels of pedestrian traffic generated by the different property land uses within the 2017 CBD, properties are assigned benefit points based upon the likelihood of 2017 CBD pedestrian traffic to shop, dine, visit, or seek out services from the different property land uses throughout the 2017 CBD. The benefit points assigned are weighted based upon the walking trip purpose identified in the 2009 NHTS survey. After reducing the population of 2,930 in the various neighborhoods who use walking as the primary mode of transportation by the 640 people engaged in general benefit, there is a walking trip population of 2,290 with trip purposes attributable to special benefit. Allocating this special benefit population to each of the special benefit trip purposes identified in the 2009 NHTS survey, the special benefit population is allocated as follows:

Trip Purpose	2009 NHTS Survey % (1)	Special Benefit Population
Home	35.97%	1,132
Work	6.34%	200
School/Daycare/Religious Activity	4.89%	154
Medical/Dental Services	0.64%	20
Shopping/Errands	12.05%	380
Family Personal Business/Obligations	6.34%	200
Meals	6.46%	204
<b>Total Special Benefit Population</b>	<b>72.69%</b>	<b>2,290</b>

(1) Does not include those trip purposes previously identified as general benefit.

To determine the assigned aesthetic benefit points and safety benefit points for each property land use category within the 2017 CBD, the total allocated special benefit population determined in the above table was categorized into each of the three 2017 CBD property land use categories. Work, Medical/Dental Services, Shopping/Errands, Family Personal Business/Obligations, and Meals special benefit trip purpose populations were assigned to the Non-Residential Property category, Home was assigned to the Residential Property category, and School/Daycare/Religious Activity was assigned to the Non-Profit/Public Property category.

Utilizing the Non-Residential Property land use as the base land use category, an aesthetic benefit point and a safety benefit point of 1.00 is assigned. The other property land use categories are assigned aesthetic benefit points and safety benefit points based upon their proportional relationship to the special benefit population for Non-Residential Property. For example, the Residential Property total special benefit population of 1,132 is approximately 1.13 times that of the Non-Residential Property total special benefit population of 1,004; the Non-Profit / Public Property total special benefit population of 154 is approximately 0.15 times that of Non-Residential Property total special benefit population of 1,004.

Trip Purpose	Special Benefit Population	Aesthetic and Safety Benefit Points
Non-Residential Property	1,004	1.000
Residential Property	1,132	1.130
Non-Profit / Public Property	154	0.150
<b>Total Special Benefit Population</b>	<b>2,290</b>	

The 2017 CBD intends to provide varying levels of service with regard to the Sidewalk Operations Program. These service levels are not uniform throughout the 2017 CBD, but are uniform throughout each zone of benefit. There is a base level of service that will be provided throughout the 2017 CBD. This service level is consistent throughout the boundaries of Benefit Zones 2 and 3, and includes regular sidewalk and gutter sweeping three times per week, and sidewalk steam cleaning one time per year, in addition to the other services provided under the Sidewalk Operations Program. Benefit Zone 1 will receive an enhanced level of sidewalk and gutter sweeping (six times per week), and sidewalk steam cleaning (two times per year), plus the same level of service as Benefit Zones 2 and 3 for all other services under the Sidewalk Operation Program.

Benefit Zones 2 and 3 (Base Level of Service for Sidewalk Operations)

A base level of sidewalk operation services is provided in Benefit Zones 2 and 3, and as such, aesthetic and safety benefit points in those Benefit Zones are assigned as follows, as determined in the table above (to recognize aesthetic and safety benefits provided to undeveloped property, 0.150 benefit points were assigned for aesthetics and safety):

Property Land Use	Aesthetic Benefit Points	Safety Benefit Points
Non-Residential Property	1.000	1.000
Residential Property	1.130	1.130
Non-Profit / Public Property	0.150	0.150
Undeveloped Property	0.150	0.150

Benefit Zone 1 (Enhanced Level of Service for Sidewalk Operations)

Because of the increased level of sidewalk operations services within Benefit Zone 1, aesthetic and safety benefit points are assigned at approximately 1.222-1.25 times higher than those in Benefit Zones 2 and 3. The following table illustrates the increased level of benefit to property in Benefit Zone 1 by the assignment of factors for each service, and the calculation of a Benefit Zone Multiplier:

Sidewalk Operations Program Services	Zones 2 and 3 Factor (Base)	Zone 1 Factor
Regular sidewalk and gutter sweeping (1)	1.00	2.00
Sidewalk steam cleaning (2)	1.00	2.00
Reporting and removal of illegal dumping	1.00	1.00
Reporting and removal of graffiti	1.00	1.00
Weed removal	1.00	1.00
Beautification and streetscape improvements	1.00	1.00
Private security patrol officer	1.00	1.00
Installation and use of CCTV to help mitigate crime	1.00	1.00
Reporting incidents of crime to the City	1.00	1.00
<b>Total</b>	<b>9.00 8.00</b>	<b>11.00 10.00</b>
<b>Benefit Zone Multiplier</b>	<b>1.000</b>	<b>1.222 1.250</b>

- (1) Zone 1 receives this service six times per week, while Zones 2 and 3 receive this service only three times per week.
- (2) Zone 1 receives this service two times per year, while Zones 2 and 3 receive this service only one time per year.

Since the overall benefit from sidewalk operation services is approximately 1.222-1.25 times higher in Benefit Zone 1, the aesthetic benefit points and safety benefit points are assigned as follows:

Property Land Use	Aesthetic Benefit Points	Safety Benefit Points
Non-Residential Property	1.222 1.250	1.222 1.250
Residential Property	1.384 1.413	1.384 1.413
Non-Profit / Public Property	0.183 0.188	0.183 0.188
Undeveloped Property	0.183 0.188	0.183 0.188

## Economic Benefit Points

The 2017 CBD is an established mixed-use area that features a blend of non-residential, residential, non-profit, and public property with development and redevelopment potential. The potential for properties to develop and redevelop to maximize their use as well as invest in their economic presence, 2017 CBD properties are assigned economic benefit points for the benefits received from the 2017 CBD's activities. 2017 CBD activities are designed to strengthen the economic landscape within the 2017 CBD area. 2017 CBD branding and marketing activities will be geared towards creating a more vibrant and thriving commercial area, maximizing occupancy for both non-residential and residential units, and encouraging the use of non-profit and public services, which will support increased activity for existing property and encourage the development or redevelopment of other property.

An area with a variety of non-residential activity contained within a thriving economic area will encourage individuals to stay within the 2017 CBD to shop, dine and take part in other commercial activities instead of seeking similar activities outside of the 2017 CBD.

As noted in Section 5, economic benefits are derived from both the Sidewalk Operations Program and the Marketing and Identity Enhancement Program, both of which provide varying levels of service. These service levels are not uniform throughout the 2017 CBD, but are uniform throughout each zone of benefit.

### Benefit Zone 3 (Base Level of Service for Sidewalk Operations, Base Level of Service for Marketing and Identity Enhancement Operations)

A base level of service for sidewalk operations and marketing activities is provided in Benefit Zone 3. Utilizing the Non-Residential Property land use as the base land use category, 2,000 economic benefit points are assigned to account for these activities within this Benefit Zone. A vibrant and thriving mixed-use area will aid in retaining the long-term occupancy among the residential units throughout the 2017 CBD, as well as strengthen the community brand for the area in which these residents live. To account for the activities that will enhance economic development, Residential Property is assigned 1.00 economic benefit point. The increased economic activity will primarily benefit Non-Residential and Residential property, but there are benefits provided to Non-Profit and Public Properties, too, by providing increased exposure for the non-profit and public services available, and providing an overall enhanced 2017 CBD area. To account for this economic benefit, Non-Profit and Public Properties are assigned 0.50 economic benefit points. Undeveloped Property is assigned 0.25 economic benefit points to recognize the limited benefits received from these activities.

<b>Property Land Use</b>	<b>Economic Benefit Points</b>
Non-Residential Property	2.000
Residential Property	1.000
Non-Profit / Public Property	0.500
Undeveloped Property	0.250



Benefit Zone 2 (Base Level of Service for Sidewalk Operations, Enhanced Level of Service for Marketing and Identity Enhancement Operations)

The service level for sidewalk operations in Benefit Zone 2 is the same as in Benefit Zone 3; however, because of the increased level of marketing activities in Benefit Zone 2 as compared to Benefit Zone 3, economic benefit points in Benefit Zone 2 are assigned at 1.077-083 times the amount assigned in Benefit Zone 3. The following table illustrates the increased level of benefit to property in Benefit Zone 2 by the assignment of factors for each service, and the calculation of a Benefit Zone Multiplier:

<b>Sidewalk Operations Program and Marketing and Identity Enhancement Program Services</b>	<b>Zone 3 Factor (Base)</b>	<b>Zone 2 Factor</b>
Regular sidewalk and gutter sweeping	1.00	1.00
Sidewalk steam cleaning	1.00	1.00
Reporting and removal of illegal dumping	1.00	1.00
Reporting and removal of graffiti	1.00	1.00
Weed removal	1.00	1.00
Beautification and streetscape improvements	1.00	1.00
Private security patrol officer	1.00	1.00
Installation and use of CCTV to help mitigate crime	1.00	1.00
Reporting incidents of crime to the City	1.00	1.00
Special & retail events: Oakland First Fridays event	0.00	1.00
Website/Internet	1.00	1.00
Advertising	1.00	1.00
Communications	1.00	1.00
Business retention/attraction	1.00	1.00
<b>Total</b>	<b>13.00</b>	<b>12.00</b>
<b>Benefit Zone Multiplier</b>	<b>1.000</b>	<b>1.077 1.083</b>

Since the overall economic benefit is approximately 1.077-083 times higher in Benefit Zone 2 than in Benefit Zone 3, the economic benefit points are assigned as follows:

<b>Property Land Use</b>	<b>Economic Benefit Points</b>
Non-Residential Property	2.154 <u>2.166</u>
Residential Property	1.077 <u>1.083</u>
Non-Profit / Public Property	0.539 <u>0.542</u>
Undeveloped Property	0.269 <u>0.271</u>

Benefit Zone 1 (Enhanced Level of Service for Sidewalk Operations, Enhanced Level of Service for Marketing and Identity Enhancement Operations)

The service levels for sidewalk operations and marketing activities in Benefit Zone 1 are higher than those service levels offered in Benefit Zone 3. Because of this, economic benefit points in Benefit Zone 1 are assigned at 1.234-25 times the amount assigned in Benefit Zone 3. The following table illustrates the increased level of benefit to property in Benefit Zone 1 by the assignment of factors for each service, and the calculation of a Benefit Zone Multiplier:

<b>Sidewalk Operations Program and Marketing and Identity Enhancement Program Services</b>	<b>Zone 3 Factor (Base)</b>	<b>Zone 1 Factor</b>
Regular sidewalk and gutter sweeping (1)	1.00	2.00
Sidewalk steam cleaning (2)	1.00	2.00
Reporting and removal of illegal dumping	1.00	1.00
Reporting and removal of graffiti	1.00	1.00
Weed removal	1.00	1.00
Beautification and streetscape improvements	1.00	1.00
Private security patrol officer	1.00	1.00
Installation and use of CCTV to help mitigate crime	1.00	1.00
Reporting incidents of crime to the City	1.00	1.00
Special & retail events: Oakland First Fridays event	0.00	1.00
Website/Internet	1.00	1.00
Advertising	1.00	1.00
Communications	1.00	1.00
Business retention/attraction	1.00	1.00
<b>Total</b>	<b>13.00 12.00</b>	<b>16.00 15.00</b>
<b>Benefit Zone Multiplier</b>	<b>1.000</b>	<b>1.234 1.250</b>

- (1) Zone 1 receives this service six times per week, while Zones 2 and 3 receive this service only three times per week.
- (2) Zone 1 receives this service two times per year, while Zones 2 and 3 receive this service only one time per year.

Since the overall economic benefit is approximately 1.234 1.25 times higher in Benefit Zone 1 than in Benefit Zone 3, the economic benefit points are assigned as follows:

<b>Property Land Use</b>	<b>Economic Benefit Points</b>
Non-Residential Property	2.462 2.500
Residential Property	1.234 1.250
Non-Profit / Public Property	0.616 0.625
Undeveloped Property	0.308 0.313

## 5.6. Summary of Benefit Points per Benefit Zone

The total benefit point assignment for each of the property land use categories in each Benefit Zone is as follows:

### Benefit Zone 1

Property Land Use	Aesthetic Benefit Points	Safety Benefit Points	Economic Benefit Points	Total Benefit Points
Non-Residential Property	4.222 1.250	4.222 1.250	2.462 2.500	4.906 5.000
Residential Property	4.384 1.413	4.384 1.413	1.234 1.250	3.993 4.076
Non-Profit/Public Property	0.183 0.188	0.183 0.188	0.646 0.625	0.982 1.001
Undeveloped Property	0.183 0.188	0.183 0.188	0.308 0.313	0.674 0.689

### Benefit Zone 2

Property Land Use	Aesthetic Benefit Points	Safety Benefit Points	Economic Benefit Points	Total Benefit Points
Non-Residential Property	1.000	1.000	2.154 2.166	4.154 4.166
Residential Property	1.130	1.130	1.077 1.083	3.337 3.343
Non-Profit/Public Property	0.150	0.150	0.539 0.542	0.839 0.842
Undeveloped Property	0.150	0.150	0.269 0.271	0.569 0.571

### Benefit Zone 3

Property Land Use	Aesthetic Benefit Points	Safety Benefit Points	Economic Benefit Points	Total Benefit Points
Non-Residential Property	1.000	1.000	2.000	4.000
Residential Property	1.130	1.130	1.000	3.260
Non-Profit/Public Property	0.150	0.150	0.500	0.800
Undeveloped Property	0.150	0.150	0.250	0.550

## 5.7. Parcel Factors

The method of apportioning benefit to parcels within the 2017 CBD reflects the proportional special benefit assigned to each property from the 2017 CBD improvements, maintenance, and activities based upon the various property characteristics for each parcel as compared to other properties within the 2017 CBD. As part of the special benefit analysis various property characteristics were analyzed including street frontage, building size, land use, etc. Given that the special benefits provided by the 2017 CBD improvements, maintenance, and activities focus on aesthetics, safety, and economic activity, it was determined that linear street frontage, building square footage, and land use are the most appropriate parcel factors. Each parcel's linear street frontage, building square footage, and land use have been used as the primary assessment variables for the calculation and assignment of parcel factors.

### Land Use

Properties in the 2017 CBD are assigned a land use category, as further outlined below, and may be reassigned if the property's land use changes.

Non-Residential Property: Non-Residential Property consists of parcels owned or leased by a profit-making entity (rather than by a government or non-profit entity) and used for commercial purposes including, but not limited to, retail, offices, restaurants, commercial garages, hotels/motels, medical/dental offices, hospitals, and pay-to-use parking structures and parking lots.

Residential Property: Residential Property consists of single-family dwellings, duplexes, triplexes, fourplexes, condominiums, and apartment units used exclusively for residential purposes.

Non-Profit Property: Non-Profit Property consists of parcels owned or used as follows:

- Includes parcels owned by non-profit entities approved under section 501(c) of the Internal Revenue Service code.
- Includes parcels that are occupied (80% or more of building square footage) by one or more non-profit corporations, as tenants.
- Includes parcels that are occupied (80% or more of building square footage) by activities that receive a welfare tax exemption or by an affordable housing development regulated by covenants or regulatory agreements with a public agency.
- Includes parcels owned by, or leased to, a public utility.

Public Property: Public Property consists of parcels owned or used as follows:

- Includes parcels owned by a state, regional, or city government entity; for example, police stations, schools, and government-owned office buildings.
- Includes parcels that are occupied (80% or more of building square footage) by one or more public entities, as tenants.

Undeveloped Property: Undeveloped Property consists of parcels of raw undeveloped land or parcels used as private parking lots.

By adjusting the assigned special benefit points assigned for each property land use category by parcel factors, a more complete picture of the proportional special benefits received by each parcel within the 2017 CBD is presented. Therefore, linear, and building factors were calculated and assigned for each parcel in the 2017 CBD according to the formulas below:

Linear Factor

Given the linear nature of the cleaning and public safety improvements, maintenance, and activities, each parcel within the 2017 CBD is assigned a linear factor that is equal to the parcel's linear street frontage that receives ongoing 2017 CBD cleaning and public safety improvements, maintenance, and activities.

In order to create a factor to account for the many variations in frontages throughout the 2017 CBD, the minimum frontage for City properties was considered. Pursuant to the City's Planning Code, each lot shall have a frontage of at least 25 linear feet for most of the zoning uses within the 2017 CBD. Utilizing the prescribed minimum frontage as set forth in the City's Planning Code, a linear factor is calculated for each parcel based upon the assigned linear street footage for the parcel divided by 25:

Parcel's Linear Factor	=	Parcel's Assigned Linear Street Frontage	/	25
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There are several parcels throughout the 2017 CBD that share the same area footprint, with each of these parcels being assigned a separate Assessor's Parcel Number by the Alameda County Assessor's office. For those areas that include multiple Assessor's Parcels, each Assessor's Parcel's assigned linear street frontage shall be calculated by allocating the total linear street frontage for the area equally to each Assessor's Parcel located on the footprint of that area.

Building Factor

Buildings throughout the 2017 CBD range from a single-story structure to a large building with multiple stories. In order to create a factor to account for the many variations in the buildings, the minimum lot size for City properties was considered. In the 2017 CBD area, the majority of the buildings cover the entire footprint of the lot. Pursuant to the City's Planning Code, each lot shall have an area of at least 4,000 square feet for most of the zoning uses within the 2017 CBD. Utilizing the prescribed minimum lot square footage as set forth in the City's Planning Code, a building factor is calculated for each parcel based upon the assigned building square footage for the parcel divided by 4,000:

Parcel's Building Factor	=	Parcel's Assigned Building Square Footage	/	4,000
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**5.8. Total Special Benefit Points Calculation**

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The formula below shows the total special benefit points calculation for each parcel within the 2017 CBD:

Parcel's Total Special Benefit Points	=	(Parcel's Linear Factor + Parcel's Building Factor)	X	Parcel's Total Benefit Points Assignment
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**Total 2017 CBD Special Benefit Points**

The total special benefit points for the 2017 CBD at this time are ~~6,406,180~~ 6,412,580.

**5.9. Special Considerations**

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**Assessor's Data and Parcel Changes**

The use of the latest County Assessor's Secured Roll information has been and shall be used in the future as the basis in determining each parcel's land use category and acreage, unless better data was or is available to the City/Management. In addition, if any parcel within the 2017 CBD is identified to be an invalid parcel number, the land use category, street frontage, and acreage of the subsequent valid parcels shall serve as the basis in assigning parcel factor special benefit points.

In addition, property characteristics may change from year-to-year, which can affect the calculation of Special Benefit Points in future years. If total 2017 CBD Special Benefit Points increase in future years due to development, land use classification changes, etc., the maximum assessment revenue may increase accordingly.

## Publicly Owned Parcels and Mixed Use Property

Any publicly owned parcels that benefit from the improvements cannot be exempt from the assessment. The special benefits accruing to these types of parcels must be determined using the same kind of formulas and benefit point assignment as applied to privately owned parcels. This requirement is clearly conveyed in Article XIII D, Section 4(a) of the California Constitution which states in part, "... *Parcels within a district that are owned or used by any agency, the State of California or the United States shall not be exempt from assessment unless the agency can demonstrate by clear and convincing evidence that those publicly owned parcels in fact receive no special benefit.*" Publicly owned parcels have been categorized and assigned benefit units using the same methodology as privately owned parcels, based on their land use as shown on the County Assessor's latest secured property tax roll.

Mixed-use property will be examined on a case-by-case basis, as identified, in an effort to determine the appropriate proportion of land use classification assignments on the mixed-use property.

### **Assessor's Parcel Number 008 -0674-036-00 (437 25<sup>th</sup> Street)**

Assessor's Parcel Number 008 -0674-036-00 is currently included in the 2017 CBD, and will benefit from the maintenance, servicing, and operation of the 2017 CBD improvements; however, this parcel is projected to merge with another property in the Lake Merritt/Uptown CBD, a different district formed pursuant to the Code. This parcel will thus be included in the Lake Merritt/Uptown CBD, as a parcel may only be included in one assessment district formed pursuant to the Code. This parcel will, however, be levied in the 2017 CBD until it becomes part of the Lake Merritt/Uptown CBD.

## 6. METHOD OF ASSESSMENT

### 6.1. Balance to be Assessed

The general benefit, which is the percentage of the total budget, excluding incidental costs, that must be funded through sources other than assessments, is 4.47% of the total project cost. The special benefit, which is the percentage of the budget that may be funded by assessments, is 95.53%.

Description	Budget Amount	
Total Operating Costs	\$487,500.00	<u>431,437.50</u>
Less: General Benefit Contribution	(21,791.25)	(19,285.26)
<b>Total Assessable Operating Costs</b>	<b>\$465,708.75</b>	<b><u>\$412,152.24</u></b>
Incidental Costs	\$162,500	<u>143,812.50</u>
<b>Total Costs to be Assessed</b>	<b>\$628,208.75</b>	<b><u>\$555,964.74</u></b>

#### Assessment Amount per Special Benefit Point

The assessment per special benefit point is calculated by dividing the total costs to be assessed by the total special benefit points assigned to the parcels within the 2017 CBD. The following formula provides the assessment per special benefit point calculation:

$$\text{Total Costs to be Assessed} / \text{Total 2017 CBD Special Benefit Points} = \text{Assessment Rate per Special Benefit Point}$$

$$\$628,208.75 / 555,964.74 / 6,406.18 = 6,412.580 = \$98.06293 / 86.69908$$

The special benefit analysis and assignment of special benefit points has been calculated in relation to the total costs to be assessed. No assessment will be imposed on any parcel that exceeds the reasonable cost of the proportional special benefit conferred on the parcel.

## 6.2. Method of Assessment Spread

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The method of assessment is based upon a formula that assigns the special benefit to each parcel, with special benefit points being adjusted by linear and building factors. The formulas below provide a summary of the annual assessment calculation for each parcel in the 2017 CBD.

(A) Parcel's Total Special Benefit Points	=	(B + C) (Parcel's Linear Factor + Parcel' Building Factor)	X	(D) Parcel's Total Benefit Points
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<b>(B) Linear Factor</b>	=	Parcel's Assigned Linear Frontage	/	25
<b>(C) Building Factor</b>	=	Parcel's Assigned Building Square Footage	/	4,000

Benefit Zone 1

<b>Property Land Use</b>	<b>(D) Parcel's Total Benefit Points</b>
Non-Residential Property	4.906 <u>5.000</u>
Residential Property	3.993 <u>4.076</u>
Non-Profit/Public Property	0.982 <u>1.001</u>
Undeveloped Property	0.674 <u>0.689</u>

Benefit Zone 2

<b>Property Land Use</b>	<b>(D) Parcel's Total Benefit Points</b>
Non-Residential Property	4.154 <u>4.166</u>
Residential Property	3.337 <u>3.343</u>
Non-Profit/Public Property	0.839 <u>0.842</u>
Undeveloped Property	0.569 <u>0.571</u>

Benefit Zone 3

<b>Property Land Use</b>	<b>(D) Parcel's Total Benefit Points</b>
Non-Residential Property	4.000
Residential Property	3.260
Non-Profit/Public Property	0.800
Undeveloped Property	0.550

Parcel's 2017/18 Maximum Allowable Assessment(1)	=	(A) x \$98.06293 <u>86.69908</u> Parcel's Total Special Benefit Points x \$98.06293 <u>\$86.69908</u>
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(1) Subject to a cost of living inflator, beginning Fiscal Year 2018/19.

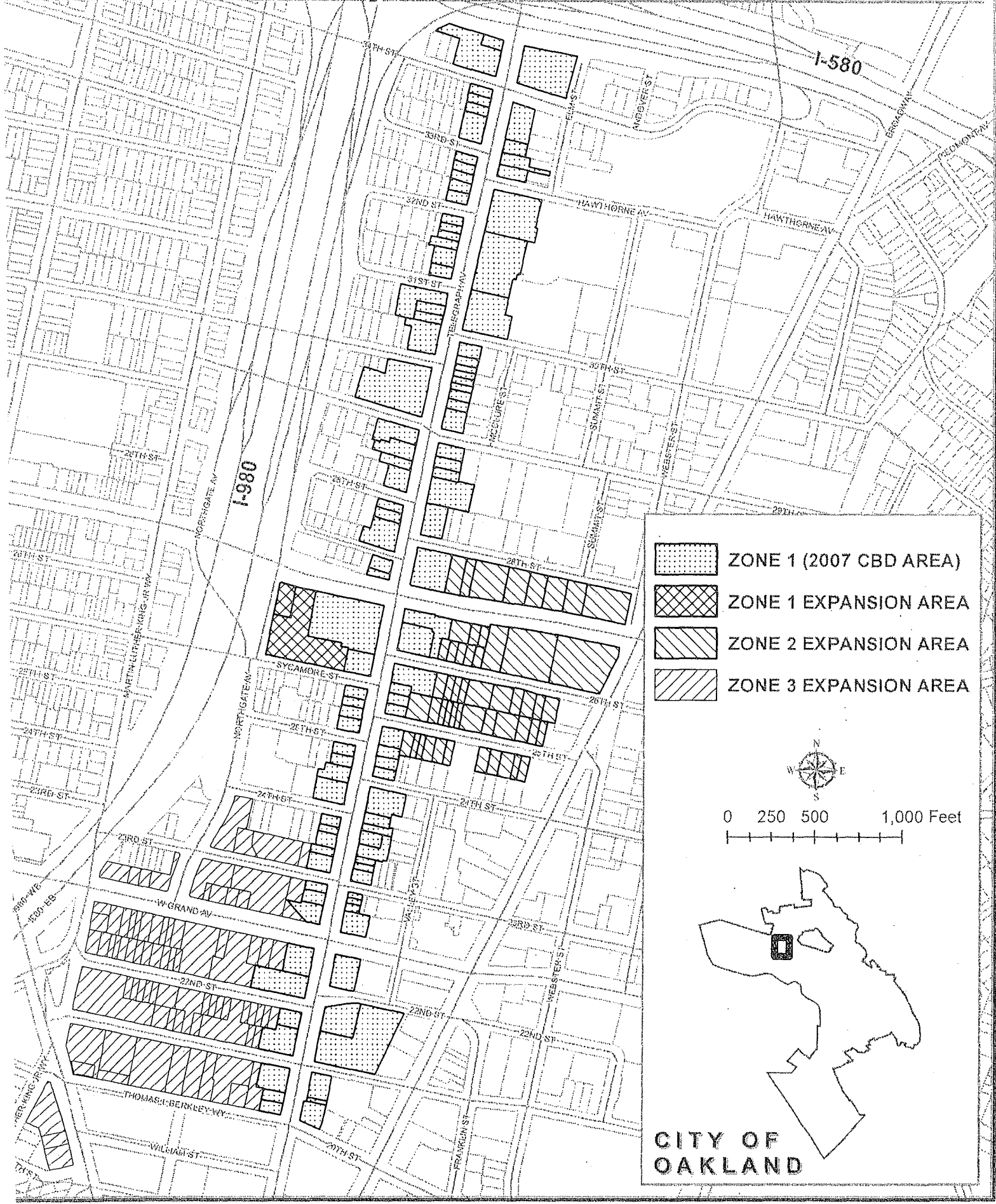
**6.3. Cost of Living Inflator**

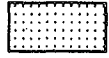
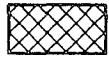
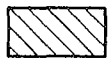
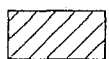
Each fiscal year beginning Fiscal Year 2018/19, the maximum allowable assessment rate per special benefit point may increase by up to five percent (5.00%) based on recommendation by the 2017 CBD Advisory Board in its annual report to the City and on City Council approval. The annual assessment cannot exceed the actual costs to operate the 2017 CBD in any given year.

## **7. PROPOSED BOUNDARY MAP**

A Proposed Boundary Map for the 2017 CBD is shown on the following page. The lines and dimensions of each lot or parcel within the 2017 CBD are those lines and dimensions shown on the maps of the Assessor, at the time this report was prepared, and are incorporated by reference herein and made part of this Engineer's Report.

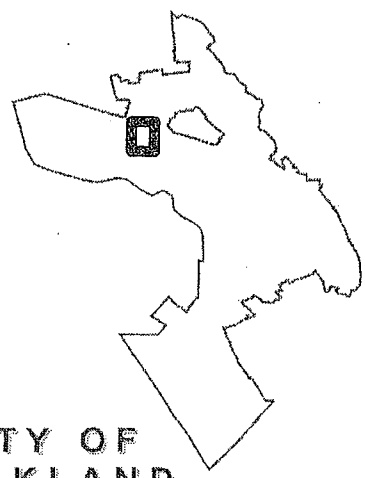
# Community Benefit District 2017



-  ZONE 1 (2007 CBD AREA)
-  ZONE 1 EXPANSION AREA
-  ZONE 2 EXPANSION AREA
-  ZONE 3 EXPANSION AREA



0 250 500 1,000 Feet

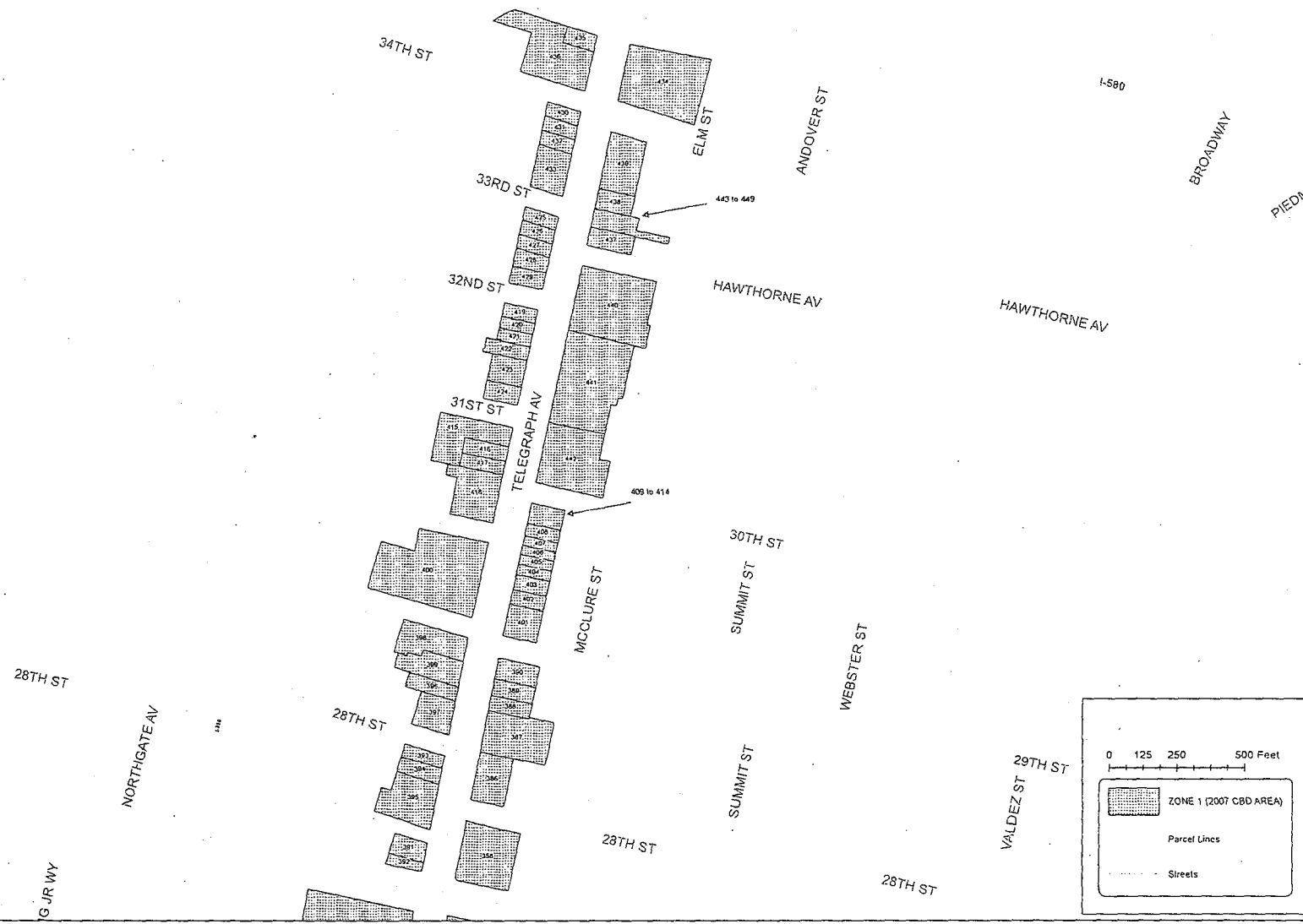


CITY OF OAKLAND

# BOUNDARIES OF KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017

CITY OF OAKLAND  
COUNTY OF ALAMEDA  
STATE OF CALIFORNIA

APN	Assessment ID	Zone
009-0664-028-04	358	1
009-0685-014-03	366	1
009-0685-015-00	387	1
009-0686-016-00	388	1
009-0686-017-00	389	1
009-0686-018-00	390	1
009-0689-001-00	391	1
009-0689-002-00	397	1
009-0690-001-00	393	1
009-0690-007-00	394	1
009-0690-005-01	395	1
009-0697-003-00	396	1
009-0697-004-00	397	1
009-0697-044-01	398	1
009-0697-049-01	399	1
009-0698-033-00	405	1
009-0699-012-01	401	1
009-0699-013-00	402	1
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009-0699-016-00	405	1
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009-0699-018-00	407	1
009-0699-019-00	408	1
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009-0699-042-00	412	1
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009-0715-020-00	444	1
009-0715-021-00	445	1
009-0715-022-00	446	1
009-0715-023-00	447	1
009-0715-024-00	448	1
009-0715-025-00	449	1



0 125 250 500 Feet

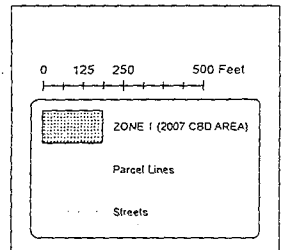
ZONE 1 (2007 CBD AREA)  
 Parcel Lines  
 Streets

# BOUNDARIES OF KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017

CITY OF OAKLAND  
COUNTY OF ALAMEDA  
STATE OF CALIFORNIA

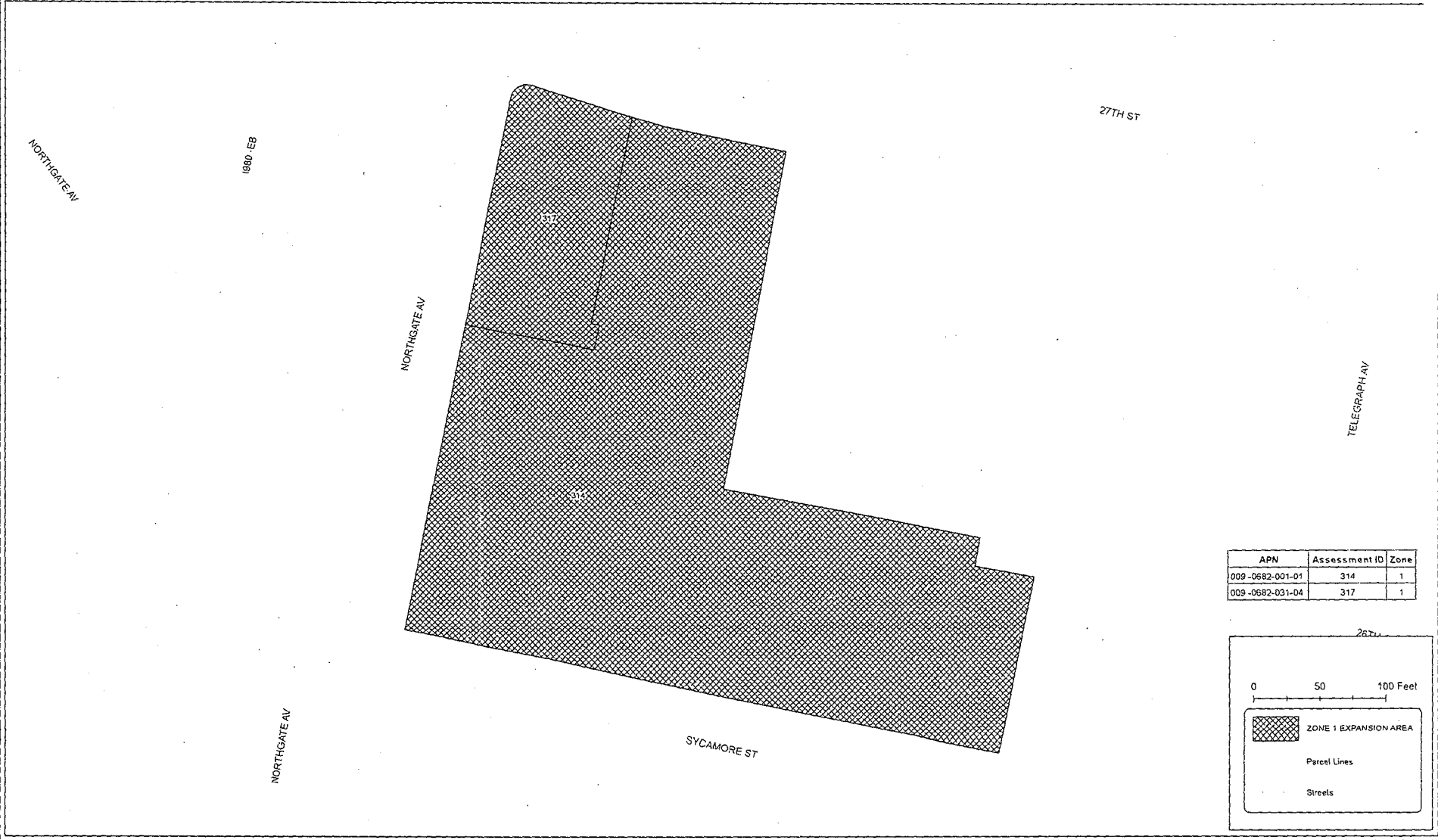
APN	Assessment ID	Zone
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008-0645-004-00	21	1
008-0645-005-00	22	1
008-0647-001-00	30	1
008-0647-002-00	31	1
008-0648-011-03	68	1
008-0648-016-03	69	1
008-0649-001-01	70	1
008-0649-001-02	71	1
008-0649-010-00	72	1
008-0658-001-00	73	1
008-0658-006-02	74	1
008-0658-007-00	75	1
008-0658-008-00	76	1
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008-0659-002-01	78	1
008-0659-003-02	79	1
008-0660-002-00	109	1
008-0660-003-05	110	1
008-0660-005-00	122	1
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008-0664-001-00	127	1
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008-0688-003-00	168	1
008-0688-004-00	169	1
008-0688-005-00	170	1

APN	Assessment ID	Zone
008-0689-001-00	171	1
008-0689-002-00	172	1
008-0689-003-00	173	1
008-0689-004-00	174	1
008-0689-005-00	175	1
008-0689-006-00	176	1
008-0690-001-00	177	1
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009-0683-020-00	332	1
009-0683-021-01	333	1
009-0684-011-00	353	1
009-0684-012-01	354	1



BOUNDARIES OF  
KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017

CITY OF OAKLAND  
COUNTY OF ALAMEDA  
STATE OF CALIFORNIA



APN	Assessment ID	Zone
009-0682-001-01	314	1
009-0682-031-04	317	1

# BOUNDARIES OF KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017

CITY OF OAKLAND  
COUNTY OF ALAMEDA  
STATE OF CALIFORNIA

APN	Assessment ID	Zone
008-0674-01-00	148	2
008-0674-02-00	149	2
008-0674-03-00	150	2
008-0674-04-00	151	2
008-0674-05-00	152	2
008-0674-06-00	153	2
008-0674-07-00	154	2
008-0674-08-00	155	2
008-0674-09-00	156	2
008-0674-10-00	157	2
008-0674-11-00	158	2
008-0683-00-00	216	2
008-0683-01-00	217	2
008-0683-02-00	218	2
008-0683-03-00	219	2
008-0683-04-00	220	2
008-0683-05-00	221	2
008-0683-06-00	222	2
008-0683-07-00	223	2
008-0683-08-00	224	2
008-0683-09-00	225	2
008-0683-10-00	226	2
008-0683-11-00	227	2
008-0683-12-00	228	2
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008-0683-14-00	230	2
008-0683-15-00	231	2
008-0683-16-00	232	2
008-0683-17-00	233	2
008-0683-18-00	234	2
008-0683-19-00	235	2
008-0683-20-00	236	2
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008-0683-22-00	238	2
008-0683-23-00	239	2
008-0683-24-00	240	2
008-0683-25-00	241	2
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008-0683-29-00	245	2
008-0683-30-00	246	2
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008-0683-32-00	248	2
008-0683-33-00	249	2
008-0683-34-00	250	2
008-0683-35-00	251	2
008-0683-36-00	252	2
008-0683-37-00	253	2
008-0683-38-00	254	2
008-0683-39-00	255	2
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008-0683-66-00	282	2
008-0683-67-00	283	2
008-0683-68-00	284	2
008-0683-69-00	285	2

MERRIMAC ST

TELEGRAPH AV

28TH ST

SUMMIT ST

WEBSTER ST

28TH ST

VALDEZ ST

27TH ST

VALDEZ ST

7 ST

26TH ST

25TH ST

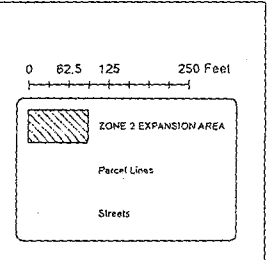
VALDEZ ST

BROADWAY

WEBSTER ST

24TH ST

VALLEY ST



# BOUNDARIES OF KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017

CITY OF OAKLAND  
COUNTY OF ALAMEDA  
STATE OF CALIFORNIA

APN	Area	APN	Area
023-001-001	1	023-001-001	137
023-001-002	2	023-001-002	138
023-001-003	3	023-001-003	139
023-001-004	4	023-001-004	140
023-001-005	5	023-001-005	141
023-001-006	6	023-001-006	142
023-001-007	7	023-001-007	143
023-001-008	8	023-001-008	144
023-001-009	9	023-001-009	145
023-001-010	10	023-001-010	146
023-001-011	11	023-001-011	147
023-001-012	12	023-001-012	148
023-001-013	13	023-001-013	149
023-001-014	14	023-001-014	150
023-001-015	15	023-001-015	151
023-001-016	16	023-001-016	152
023-001-017	17	023-001-017	153
023-001-018	18	023-001-018	154
023-001-019	19	023-001-019	155
023-001-020	20	023-001-020	156
023-001-021	21	023-001-021	157
023-001-022	22	023-001-022	158
023-001-023	23	023-001-023	159
023-001-024	24	023-001-024	160
023-001-025	25	023-001-025	161
023-001-026	26	023-001-026	162
023-001-027	27	023-001-027	163
023-001-028	28	023-001-028	164
023-001-029	29	023-001-029	165
023-001-030	30	023-001-030	166
023-001-031	31	023-001-031	167
023-001-032	32	023-001-032	168
023-001-033	33	023-001-033	169
023-001-034	34	023-001-034	170
023-001-035	35	023-001-035	171
023-001-036	36	023-001-036	172
023-001-037	37	023-001-037	173
023-001-038	38	023-001-038	174
023-001-039	39	023-001-039	175
023-001-040	40	023-001-040	176
023-001-041	41	023-001-041	177
023-001-042	42	023-001-042	178
023-001-043	43	023-001-043	179
023-001-044	44	023-001-044	180
023-001-045	45	023-001-045	181
023-001-046	46	023-001-046	182
023-001-047	47	023-001-047	183
023-001-048	48	023-001-048	184
023-001-049	49	023-001-049	185
023-001-050	50	023-001-050	186
023-001-051	51	023-001-051	187
023-001-052	52	023-001-052	188
023-001-053	53	023-001-053	189
023-001-054	54	023-001-054	190
023-001-055	55	023-001-055	191
023-001-056	56	023-001-056	192
023-001-057	57	023-001-057	193
023-001-058	58	023-001-058	194
023-001-059	59	023-001-059	195
023-001-060	60	023-001-060	196
023-001-061	61	023-001-061	197
023-001-062	62	023-001-062	198
023-001-063	63	023-001-063	199
023-001-064	64	023-001-064	200
023-001-065	65	023-001-065	201
023-001-066	66	023-001-066	202
023-001-067	67	023-001-067	203
023-001-068	68	023-001-068	204
023-001-069	69	023-001-069	205
023-001-070	70	023-001-070	206
023-001-071	71	023-001-071	207
023-001-072	72	023-001-072	208
023-001-073	73	023-001-073	209
023-001-074	74	023-001-074	210
023-001-075	75	023-001-075	211
023-001-076	76	023-001-076	212
023-001-077	77	023-001-077	213
023-001-078	78	023-001-078	214
023-001-079	79	023-001-079	215
023-001-080	80	023-001-080	216
023-001-081	81	023-001-081	217
023-001-082	82	023-001-082	218
023-001-083	83	023-001-083	219
023-001-084	84	023-001-084	220
023-001-085	85	023-001-085	221
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023-001-087	87	023-001-087	223
023-001-088	88	023-001-088	224
023-001-089	89	023-001-089	225
023-001-090	90	023-001-090	226
023-001-091	91	023-001-091	227
023-001-092	92	023-001-092	228
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023-001-095	95	023-001-095	231
023-001-096	96	023-001-096	232
023-001-097	97	023-001-097	233
023-001-098	98	023-001-098	234
023-001-099	99	023-001-099	235
023-001-100	100	023-001-100	236





## 8. ASSESSMENT ROLL

The assessment roll is a listing of the assessment apportioned to each lot or parcel, as shown on the last equalized roll of the Assessor. The following table summarizes the assessments within each Benefit Zone of the 2017 CBD:

Category	Total Special Benefit Points		Total Assessment	
<b>Zone 1 Parcels</b>				
Non-Residential Property	3,308.94	<u>3,358.96</u>	\$324,481.39	<u>291,219.12</u>
Residential Property	775.70	<u>723.32</u>	76,067.44	<u>62,710.89</u>
Non-Profit/Public Property	155.24	<u>160.88</u>	15,220.35	<u>13,947.87</u>
Undeveloped Property	20.19	<u>20.65</u>	1,979.89	<u>1,790.04</u>
<b>Total Zone 1 Parcels</b>	<b>4,260.01</b>	<b><u>4,263.80</u></b>	<b>\$417,749.04</b>	<b><u>369,667.91</u></b>
<b>Zone 2 Parcels</b>				
Non-Residential Property	682.35	<u>684.34</u>	\$66,913.24	<u>59,331.27</u>
Residential Property	137.60	<u>137.87</u>	13,493.46	<u>11,953.11</u>
Non-Profit/Public Property	66.00	<u>66.25</u>	6,472.15	<u>5,743.53</u>
Undeveloped Property	5.07	<u>5.09</u>	497.18	<u>441.18</u>
<b>Total Zone 2 Parcels</b>	<b>891.02</b>	<b><u>893.54</u></b>	<b>\$87,376.03</b>	<b><u>77,469.09</u></b>
<b>Zone 3 Parcels</b>				
Non-Residential Property	587.70	<u>587.67</u>	\$57,631.58	<u>50,950.09</u>
Residential Property	429.64	<u>429.73</u>	42,128.84	<u>37,257.30</u>
Non-Profit/Public Property	228.93	<u>228.92</u>	22,449.55	<u>19,847.50</u>
Undeveloped Property		8.91	873.74	<u>772.85</u>
<b>Total Zone 3 Parcels</b>	<b>1,255.15</b>	<b><u>1,255.24</u></b>	<b>\$123,083.68</b>	<b><u>108,827.74</u></b>
<b>Total Assessment</b>	<b>6,406.18</b>	<b><u>6,412.58</u></b>	<b>\$628,208.75</b>	<b><u>555,964.74</u></b>

The following table summarizes the assessments for each property type within the 2017 CBD:

Category	Total Special Benefit Points		Total Assessment	
Non-Residential Property	4,578.96	<u>4,613.65</u>	\$449,026.21	<u>399,999.64</u>
Residential Property	1,342.94	<u>1,290.92</u>	131,689.68	<u>111,921.30</u>
Non-Profit/Public Property	450.14	<u>456.05</u>	44,142.05	<u>39,538.90</u>
Undeveloped Property	34.17	<u>34.65</u>	3,350.84	<u>3,004.07</u>
<b>Total Assessment</b>	<b>6,406.18</b>	<b><u>6,412.58</u></b>	<b>\$628,208.75</b>	<b><u>555,964.74</u></b>









**KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017  
FY 2017/18 ASSESMENT ROLL**

APN	Area	Site	Classification	Front Footage	Lot Area	Building Area	(B) Linear Factor	(C) Building Factor	(D) Total Benefit Points	(A) Total Special Benefit Points	Assessment
009-0684-047-00	Zone 2	425 28TH ST #201A	Residential	10	795.77	1,210	0.404	0.303	3.343	2.361	204.69
009-0684-048-00	Zone 2	425 28TH ST #201B	Residential	10	795.77	1,275	0.404	0.319	3.343	2.415	209.40
009-0684-049-00	Zone 2	425 28TH ST #202A	Residential	10	795.77	912	0.404	0.228	3.343	2.112	183.09
009-0684-050-00	Zone 2	425 28TH ST #202B	Residential	10	795.77	1,265	0.404	0.316	3.343	2.407	208.67
009-0684-051-00	Zone 2	425 28TH ST #203A	Residential	10	795.77	1,375	0.404	0.344	3.343	2.499	216.64
009-0684-052-00	Zone 2	426 27TH ST #203B	Residential	10	795.77	1,248	0.404	0.312	3.343	2.393	207.44
009-0684-053-00	Zone 2	425 28TH ST #204A	Residential	10	795.77	1,050	0.404	0.283	3.343	2.227	193.09
009-0684-054-00	Zone 2	425 28TH ST #204B	Residential	10	795.77	1,322	0.404	0.331	3.343	2.454	212.80
009-0684-055-00	Zone 2	425 28TH ST #205A	Residential	10	795.77	966	0.404	0.242	3.343	2.157	187.01
009-0684-056-00	Zone 2	425 28TH ST #205B	Residential	10	795.77	1,240	0.404	0.310	3.343	2.386	206.86
009-0684-057-00	Zone 2	425 28TH ST #206A	Residential	10	795.77	1,060	0.404	0.265	3.343	2.236	193.82
009-0684-058-00	Zone 2	425 28TH ST	Common Area	-	-	-	-	-	-	-	-
009-0688-014-03	Zone 1	2800 TELEGRAPH AVE	Non-Residential	245	14,501	2,524	9.801	0.631	5.000	52.159	4,522.12
009-0688-015-00	Zone 1	2850 TELEGRAPH AVE	Non-Residential	121	24,137	9,346	4.859	2.337	5.000	35.976	3,119.09
009-0688-018-00	Zone 1	2864 TELEGRAPH AVE	Non-Profit/Public Property	45	5,491.46	3,964	1.800	0.991	1.001	2.794	242.23
009-0688-017-00	Zone 1	2870 TELEGRAPH AVE	Non-Residential	50	6,130	3,751	2.000	0.938	5.000	14.690	1,273.59
009-0688-018-00	Zone 1	2876 TELEGRAPH AVE	Non-Residential	184	7,395	9,484	7.345	2.371	5.000	48.578	4,211.69
009-0689-001-00	Zone 1	2719 TELEGRAPH AVE	Non-Residential	160	6,177	6,150	6.412	1.538	5.000	39.746	3,445.98
009-0689-002-03	Zone 1	2701 TELEGRAPH AVE	Non-Residential	135	3,274	2,605	5.391	0.651	5.000	30.212	2,619.35
009-0690-001-00	Zone 1	2781 TELEGRAPH AVE	Non-Residential	160	4,818	4,095	6.420	1.024	5.000	37.217	3,226.71
009-0690-002-00	Zone 1	2775 TELEGRAPH AVE	Non-Residential	46	5,818	4,050	1.841	1.013	5.000	14.269	1,237.07
009-0690-005-01	Zone 1	2757 TELEGRAPH AVE	Non-Residential	302	19,605	10,112	12.060	2.528	5.000	72.941	6,323.90
009-0697-003-00	Zone 1	2821 TELEGRAPH AVE	Non-Residential	43	6,524	7,436	1.727	1.859	5.000	17.932	1,554.73
009-0697-004-00	Zone 1	2811 TELEGRAPH AVE	Non-Residential	214	10,873	4,950	8.563	1.238	5.000	49.001	4,248.30
009-0697-044-01	Zone 1	525 29TH ST	Non-Profit/Public Property	266	15,999.00	12,257	10.659	3.064	1.001	13.737	1,191.00
009-0697-049-00	Zone 1	2831 TELEGRAPH AVE	Non-Residential	74	12,422	7,414	2.941	1.854	5.000	23.972	2,078.38
009-0698-032-00	Zone 1	2935 TELEGRAPH AVE	Residential	755	60,674.80	212,785	30.208	53.196	4.076	339.957	29,473.98
009-0699-012-01	Zone 1	2914 TELEGRAPH AVE	Non-Residential	197	9,666	10,857	7.866	2.714	5.000	52.904	4,586.69
009-0699-013-00	Zone 1	2920 TELEGRAPH AVE	Undeveloped	45	4,600.09	-	1.800	-	0.689	1.240	107.53
009-0699-014-00	Zone 1	2928 TELEGRAPH AVE	Non-Residential	45	4,500	2,784	1.800	0.696	5.000	12.480	1,081.99
009-0699-015-00	Zone 1	2934 TELEGRAPH AVE	Non-Residential	30	3,000	5,220	1.200	1.305	5.000	12.525	1,085.90
009-0699-016-00	Zone 1	2940 TELEGRAPH AVE	Residential	30	2,999.99	2,784	1.200	0.696	4.076	7.728	670.02
009-0699-017-00	Zone 1	2948 TELEGRAPH AVE	Residential	29	2,850.03	2,846	1.140	0.712	4.076	7.547	654.30
009-0699-018-00	Zone 1	2950 TELEGRAPH AVE	Non-Residential	28	2,837	2,984	1.135	0.746	5.000	9.404	815.31
009-0699-019-00	Zone 1	2958 TELEGRAPH AVE	Non-Residential	38	3,850	3,386	1.540	0.847	5.000	11.932	1,034.53
009-0699-039-00	Zone 1	491 30TH ST #101	Non-Residential	32	1,202	1,729	1.282	0.432	5.000	8.571	743.10
009-0699-040-00	Zone 1	491 30TH ST #102	Non-Residential	32	1,202	1,729	1.282	0.432	5.000	8.571	743.10
009-0699-041-00	Zone 1	491 30TH ST #103	Non-Residential	32	1,202	1,729	1.282	0.432	5.000	8.571	743.10
009-0699-042-00	Zone 1	491 30TH ST #201	Non-Residential	32	1,202	1,729	1.282	0.432	5.000	8.571	743.10
009-0699-043-00	Zone 1	491 30TH ST #202	Non-Residential	32	1,202	1,729	1.282	0.432	5.000	8.571	743.10
009-0699-044-00	Zone 1	491 30TH ST	Common Area	-	-	-	-	-	-	-	-
009-0708-001-02	Zone 1	515 31ST ST	Non-Profit/Public Property	277	20,178.20	13,177	11.064	3.294	1.001	14.373	1,246.13
009-0708-002-00	Zone 1	3031 TELEGRAPH AVE	Non-Residential	45	5,878	7,167	1.800	1.792	5.000	17.960	1,557.07
009-0708-003-00	Zone 1	3027 TELEGRAPH AVE	Residential	40	5,201.99	11,646	1.600	2.912	4.076	18.389	1,594.35
009-0708-004-00	Zone 1	3007 TELEGRAPH AVE	Non-Residential	268	19,147	10,843	10.716	2.711	5.000	67.134	5,820.43
009-0715-001-00	Zone 1	3147 TELEGRAPH AVE	Non-Residential	139	3,981	5,794	5.579	1.449	5.000	35.138	3,046.45
009-0715-002-00	Zone 1	3145 TELEGRAPH AVE	Residential	35	3,486.01	2,231	1.400	0.558	4.076	7.980	691.86
009-0715-003-00	Zone 1	3137 TELEGRAPH AVE	Residential	35	3,488.69	2,134	1.400	0.534	4.076	7.881	683.30
009-0715-004-00	Zone 1	3127 TELEGRAPH AVE	Residential	40	5,239.13	3,980	1.603	0.995	4.076	10.589	918.05
009-0715-005-00	Zone 1	3121 TELEGRAPH AVE	Residential	79	8,198.90	7,430	3.179	1.858	4.076	20.530	1,779.91
009-0715-006-00	Zone 1	3109 TELEGRAPH AVE	Non-Residential	157	5,594	8,688	6.299	2.172	5.000	42.354	3,672.01
009-0716-001-00	Zone 1	3239 TELEGRAPH AVE	Residential	141	4,052.49	4,111	5.658	1.028	4.076	27.252	2,362.72
009-0716-002-00	Zone 1	3231 TELEGRAPH AVE	Residential	43	4,356.32	5,392	1.726	1.348	4.076	12.530	1,086.36
009-0716-003-00	Zone 1	3223 TELEGRAPH AVE	Residential	40	4,052.43	4,130	1.606	1.033	4.076	10.753	932.31
009-0716-004-00	Zone 1	3217 TELEGRAPH AVE	Residential	45	5,084.75	2,474	1.816	0.619	4.076	9.924	860.41
009-0716-005-00	Zone 1	3207 TELEGRAPH AVE	Non-Residential	151	5,048	46,964	6.039	11.741	5.000	88.898	7,707.36
009-0726-001-00	Zone 1	3343 TELEGRAPH AVE	Undeveloped	141	4,113.22	-	5.658	-	0.689	3.899	337.99
009-0726-002-00	Zone 1	3333 TELEGRAPH AVE	Non-Residential	41	4,113	4,942	1.645	1.236	5.000	14.404	1,248.79
009-0726-003-00	Zone 1	3321 TELEGRAPH AVE	Non-Residential	42	4,234	6,118	1.693	1.530	5.000	16.115	1,397.13
009-0726-004-00	Zone 1	3315 TELEGRAPH AVE	Residential	225	12,411.80	22,102	8.988	5.526	4.076	59.157	5,128.86
009-0736-017-01	Zone 1	3407 ELM ST	Non-Residential	405	43,792	13,377	16.193	3.344	5.000	97.685	8,469.20
009-0737-051-00	Zone 1	3425 TELEGRAPH AVE	Residential	48	4,466.39	5,498	1.937	1.375	4.076	13.498	1,170.30
009-0737-052-00	Zone 1	3401 TELEGRAPH AVE	Non-Residential	319	32,516	21,606	12.756	5.402	5.000	90.788	7,871.19
009-0746-002-01	Zone 1	494 HAWTHORNE AVE	Non-Residential	200	7,473	4,050	7.994	1.013	5.000	45.034	3,904.37
009-0746-004-00	Zone 1	3300 TELEGRAPH AVE	Non-Residential	60	6,482	2,016	2.399	0.504	5.000	14.514	1,258.36
009-0746-006-01	Zone 1	3330 TELEGRAPH AVE	Non-Residential	276	17,639	9,716	11.047	2.429	5.000	67.378	5,841.59
009-0746-025-00	Zone 1	3200 TELEGRAPH AVE	Non-Residential	417	43,974	14,836	16.681	3.709	5.000	101.952	8,839.13
009-0746-026-00	Zone 1	3100 TELEGRAPH AVE	Non-Residential	271	50,508	54,829	10.853	13.707	5.000	122.803	10,646.89
009-0746-027-00	Zone 1	450 30TH ST	Non-Residential	384	34,242	3,337	15.351	0.834	5.000	80.927	7,016.32
009-0746-044-00	Zone 1	3240 TELEGRAPH AVE	Non-Residential	9	1,534	3,623	0.360	0.906	5.000	6.329	548.70
009-0746-045-00	Zone 1	3240 TELEGRAPH AVE	Residential	9	1,533.50	2,801	0.360	0.700	4.076	4.322	374.68
009-0746-046-00	Zone 1	3240 TELEGRAPH AVE	Residential	9	1,533.50	621	0.360	0.155	4.076	2.100	182.08
009-0746-047-00	Zone 1	3242 TELEGRAPH AVE	Non-Residential	9	1,534	882	0.360	0.221	5.000	2.903	251.64
009-0746-048-00	Zone 1	3244 TELEGRAPH AVE	Non-Residential	9	1,534	817	0.360	0.204	5.000	2.821	244.60
009-0746-049-00	Zone 1	3246 TELEGRAPH AVE	Non-Residential	9	1,534	1,256	0.360	0.314	5.000	3.370	292.18
009-0746-050-00	Zone 1	3240 TELEGRAPH AVE	Common Area	-	-	-	-	-	-	-	-
<b>TOTALS</b>										<b>6,412.580</b>	<b>\$555,964.74</b>

## 9. REFERENCES

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**Exhibit B**

(to the Resolution of Intention to Form the KCBD 2017, as Amended May 9, 2017)

**CITY OF OAKLAND  
KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017  
PROPERTY OWNER BALLOT**

This ballot is for the property owners of the parcel(s) identified below by Assessment Parcel Numbers (APN), which parcel(s) is/are located within the proposed Koreatown/Northgate Community Benefit District 2017 (hereinafter "Koreatown/Northgate CBD 2017") in the City of Oakland. A Copy of the Community Benefit District Plan (as Amended May 9, 2017) is enclosed with this Ballot. Please advise the City of Oakland as soon as possible at (510) 238-6176, if the owner and/or assessment information set forth below is incorrect.

This ballot may be used to express either support for, or opposition to, the proposed Koreatown/Northgate CBD 2017 assessment. In order to be counted, this ballot must be completed, signed, and dated below by an owner of the identified parcel(s) or by an authorized representative of the owner. **The ballot must be returned to the City Clerk of Oakland either by mail or in person to: Office of the City Clerk, Oakland City Hall, One Frank H. Ogawa Plaza, First Floor, Oakland, CA, 94612, Attn: Koreatown/Northgate CBD 2017.** If a majority (as weighted by assessment amount) of ballots received oppose the Koreatown/Northgate CBD 2017 assessment, the Koreatown/Northgate CBD 2017 will not be established and the Koreatown/Northgate CBD 2017 assessment will not be levied.

**Mail Delivery:** If by mail, fold and insert the ballot in the enclosed pre-addressed envelope, seal the envelope, add postage, and deposit in the U.S. mail.

**Personal Delivery:** If in person, fold and insert the ballot in the enclosed pre-addressed envelope, seal the envelope provided, and deliver to the City Clerk's office (address shown above) or deliver to the City Clerk at the public hearing on the Koreatown/Northgate CBD 2017.

The assessment shall not be imposed if the ballots submitted in opposition to the assessment exceed the ballots submitted in favor of the assessment, with the ballots weighted according to the proportional financial obligation of the affected property.

**IN ORDER TO BE COUNTED, THIS BALLOT MUST BE RECEIVED BY THE CITY CLERK PRIOR TO THE CLOSE OF THE PUBLIC INPUT PORTION OF THE PUBLIC HEARING ON THE KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017, WHICH IS SCHEDULED FOR JULY 18, 2017, AT 6:30 PM IN THE CITY COUNCIL CHAMBERS, OAKLAND CITY HALL, 1 FRANK OGAWA PLAZA, OAKLAND, CALIFORNIA 94612. To cast this ballot, check the appropriate box below (either yes or no), sign the ballot at the bottom, and return either this entire page or the portion below this line.**

**BALLOT**

*Please mark in the box below to cast your vote:*

**YES**, I am in favor of the formation of the district and the proposed assessments on the parcel(s) identified on this ballot.

**NO**, I oppose the formation of the district and the proposed assessment on the parcel(s) identified on this ballot.

<b>Owner</b>	<b>APN</b>	<b>Assessment</b>
Xxxx	xxxx	\$xxxxxx

Total Koreatown/Northgate Community Benefit District 2017 Assessment Amount (Votes Eligible) \$

\_\_\_\_\_  
NAME (PRINTED)

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE



2017 MAY 12 AM 9:16

# OAKLAND CITY COUNCIL

RESOLUTION NO. \_\_\_\_\_ C.M.S.

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**RESOLUTION AUTHORIZING THE CITY ADMINISTRATOR (1) TO SIGN THE BALLOT IN FAVOR OF THE FORMATION OF THE KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017 ("KCBD 2017") AND (2) TO PAY A CUMULATIVE FISCAL YEAR 2017-2018 FAIR SHARE ASSESSMENT IN AN APPROXIMATE AMOUNT OF \$4,403.31 FOR TWO (2) CITY-OWNED PROPERTIES ON WHICH ASSESSMENTS ARE TO BE LEVIED (2100 TELEGRAPH AVENUE - APN 008-0648-016-03 AND 404 26<sup>TH</sup> - STREET APN 009-0684-005-01) IF THE KCBD 2017 IS ESTABLISHED**

**WHEREAS**, the City Council approved an Oakland Business Improvement Management District Ordinance (Ord. 12190, 1999) delineating procedures and policies for the formation of a property assessment district within the City of Oakland; and

**WHEREAS**, the City Council approved a Neighborhood Business Improvement District Program pursuant to Oakland City Council Resolution No. 75323, dated November 9, 1999, to provide technical and financial assistance to stakeholder groups of business owners in the City to assist in the formation of such districts; and

**WHEREAS**, the City has adopted a policy encouraging the formation of Business Improvement Districts; and

**WHEREAS**, pursuant to the requirements of the Oakland Business Management District Ordinance stakeholders in the Koreatown/Northgate district (generally Telegraph Avenue from 20<sup>th</sup> Street to 35<sup>th</sup> Street) have circulated a Petition to form the Koreatown/Northgate Community Benefit District 2017 (hereinafter "District") to undertake the Management District Plan for the Koreatown/Northgate Community Benefit District 2017 (hereinafter "Plan"); and

**WHEREAS**, if the Petition in support of formation of the District is signed by more than 30 percent of the weighted value of the assessments that would be imposed on properties within the proposed District, then the City may adopt a Resolution of Intention and cause ballots to be distributed to all property owners within the boundaries of the proposed District; through such ballots, votes in favor of or against the formation of the proposed District may be cast by the affected property owners, and such ballots will be tabulated at a public hearing, and

**WHEREAS**, concurrently with this proposed resolution, the Council is considering the passage of a Resolution of Intention to form the District; and

**WHEREAS**, the proposed District includes two (2) City-owned properties on which assessments are to be levied (2100 Telegraph Avenue - APN 008-0648-016-03 and 404 26<sup>th</sup> - Street APN 009-0684-005-01) which gives the City the right to sign the ballots in support of District formation (the "Ballots"); and

**WHEREAS**, this resolution will authorize the City Administrator to sign the Ballots on behalf of the City of Oakland; and

**WHEREAS**, if the District is established, the assessments will take place on a yearly basis for the ten-year life of the District; and

**WHEREAS**, if the District is established, the cumulative maximum total assessment amount over the ten-year life of the district for the two (2) City-owned properties (2100 Telegraph Avenue - APN 008-0648-016-03 and 404 26<sup>th</sup> - Street APN 009-0684-005-01) is approximately \$55,384.36; and

**WHEREAS**, funds to pay the FY 2017-2018 assessment have been budgeted to the General Purpose Fund (1010)/Citywide Activities Organization (90591)/Taxes and Assessments Account (53511)/ Business Improvement District Project (1000147)/IP50; and.

**WHEREAS**, these assessments are to be made in accordance with the provisions of Proposition 218 and the Oakland Business Improvement Management District policy referenced above; now therefore be it

**RESOLVED**, that the City Council hereby authorizes the City Administrator (1) to execute the ballots in favor of the formation of the Koreatown/Northgate Community Benefit District 2017 and (2) to pay the FY 2017-2018 assessment for the two (2) City-owned properties on which assessments are to be levied (2100 Telegraph Avenue - APN 008-0648-016-03 and 404 26<sup>th</sup> - Street APN 009-0684-005-01) in a cumulative amount not to exceed \$4,403.31

IN COUNCIL, OAKLAND, CALIFORNIA, \_\_\_\_\_, 2017.

**PASSED BY THE FOLLOWING VOTE:**

AYES- BROOKS, GALLO, GIBSON McELHANEY, KALB, KAPLAN, REID, SCHAAF and PRESIDENT KERNIGHAN

NOES-

ABSENT-

ABSTENTION-

ATTEST: \_\_\_\_\_  
LATONDA SIMMONS  
City Clerk and Clerk of the Council  
of the City of Oakland, California

2017 MAY 12 AM 9:12  
**OAKLAND REDEVELOPMENT  
SUCCESSOR AGENCY**

RESOLUTION No. - \_\_\_\_\_

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**RESOLUTION AUTHORIZING THE AGENCY ADMINISTRATOR (1) TO SIGN THE BALLOT IN FAVOR OF THE FORMATION OF THE KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT 2017 ("KCBD 2017"); AND (2) TO PAY A CUMULATIVE FISCAL YEAR 2017-2018 FAIR SHARE ASSESSMENT IN AN APPROXIMATE AMOUNT OF \$696.18 FOR ONE OAKLAND REDEVELOPMENT SUCCESSOR AGENCY-OWNED PROPERTY (2016 TELEGRAPH AVENUE APN 008-0649-010-00) IF THE KCBD 2017 IS ESTABLISHED**

**WHEREAS**, the Oakland City Council approved an Oakland Business Improvement Management District Ordinance (Ord. 12190, 1999) delineating procedures and policies for the formation of a property assessment district within the City of Oakland; and

**WHEREAS**, the Oakland City Council approved a Neighborhood Business Improvement District Program pursuant to Oakland City Council Resolution No. 75323, dated November 9, 1999, to provide technical and financial assistance to stakeholder groups of business owners in the City to assist in the formation of such districts; and

**WHEREAS**, the City of Oakland has adopted a policy encouraging the formation of Business Improvement Districts; and

**WHEREAS**, pursuant to the requirements of the Oakland Business Management District Ordinance stakeholders in the Koreatown/Northgate district have circulated a Petition to form the Koreatown/Northgate Community Benefit District 2017 (hereinafter "District") to undertake the Management District Plan for the Koreatown/Northgate Community Benefit District 2017 (hereinafter "Plan"); and

**WHEREAS**, if the Petition in support of formation of the District is signed by more than 30 percent of the weighted value of the assessments that would be imposed on properties within the proposed District, then the Oakland City Council may adopt a Resolution of Intention and cause ballots to be distributed to all property owners within the boundaries of the proposed District; through such ballots, votes in favor of or against the formation of the proposed District may be cast by the affected property owners, and such ballots will be tabulated at a public hearing, and

**WHEREAS**, concurrently with this proposed resolution, the Oakland City Council is considering the passage of a Resolution of Intention to form the District; and

**WHEREAS**, the proposed District includes one (1) Successor Agency-owned property on which assessments are to be levied (2016 Telegraph Avenue APN 008-0649-010-00) which gives the Successor Agency the right to sign the ballot in support of District formation (the "Ballot"); and

**WHEREAS**, this resolution will authorize the Agency Administrator to sign the Ballot on behalf of the Successor Agency; and

**WHEREAS**, if the District is established, the assessments will take place on a yearly basis for the ten-year life of the District; and

**WHEREAS**, if the District is established, the cumulative maximum total assessment amount over the ten-year life of the district for the one (1) Successor Agency-owned property (2016 Telegraph Avenue - APN 008-0649-010-00) is approximately \$696.18; and

**WHEREAS**, funds to pay the FY 2017-2018 assessment have been budgeted to the Central District Projects Fund (5610)/Central District Redevelopment organization (85245)/Taxes and Assessments (53511)/Telegraph Plaza Project (1000169)/SC13; and

**WHEREAS**, these assessments are to be made in accordance with the provisions of Proposition 218 and the Oakland Business Improvement Management District policy referenced above; now therefore be it

**RESOLVED**, that the Oakland Redevelopment Successor Agency hereby authorizes the Agency Administrator (1) to execute the ballot in favor of the formation of the Koreatown/Northgate Community Benefit District 2017 and (2) to pay the FY 2017-2018 assessment for the one (1) Successor Agency-owned property on which assessments are to be levied (2016 Telegraph Avenue APN 008-0649-010-00) in a cumulative amount not to exceed \$696.18.

IN SUCCESSOR AGENCY, OAKLAND, CALIFORNIA, \_\_\_\_\_, 2017.

**PASSED BY THE FOLLOWING VOTE:**

AYES- BROOKS, CAMPBELL WASHINGTON, GALLO, GIBSON MCELHANEY,  
GUILLEN, KALB, KAPLAN and PRESIDENT REID

NOES-

ABSTENTIONS-

ATTEST: \_\_\_\_\_  
LATONDA SIMMONS  
Secretary of the Oakland  
Redevelopment Successor Agency