

**CITY OF OAKLAND
COUNCIL AGENDA REPORT**

FILED
OFFICE OF THE CITY CLERK
OAKLAND
2005 JUN -7 PM 2:30

TO: Office of the City Administrator
ATTN: Deborah Edgerly
FROM: Community and Economic Development Agency
DATE: July 19, 2005

A PUBLIC HEARING ON A REPORT AND RECOMMENDATION FROM THE DIRECTOR, COMMUNITY AND ECONOMIC DEVELOPMENT AGENCY, REGARDING A PROPOSED RESOLUTION ESTABLISHING THE LAUREL PROPERTY BUSINESS IMPROVEMENT DISTRICT OF 2005, APPROVING THE MANAGEMENT PLAN, DIRECTING FILING OF THE PROPOSED ASSESSMENT DISTRICT BOUNDARY DESCRIPTION, MAKING A DETERMINATION WITH REGARD TO THE MAJORITY PROTEST PROCEDURE FOR APPROVAL OF THE PROPOSED ASSESSMENTS, AND APPROVING THE ASSESSMENTS FOR THE DISTRICT.

SUMMARY

A resolution has been prepared pursuant to the City of Oakland's Business Improvement Management District (BIMD) Ordinance (ORD 12190, 1999) regarding establishing the Laurel Property Business Improvement District of 2005, approving the management plan, directing filing of the proposed assessment district boundary description, making a determination with regard to the majority protest procedure for approval of the proposed assessments, and approving the assessments for the district.

At a public hearing scheduled for July 19, 2005, City Council will consider adoption of the above resolution. Public testimony will be heard and the results of a State Proposition 218 mandated mail balloting of all affected property owners will be presented. If a majority protest is evidenced (i.e. 50+ % of a weighted majority of the ballots submitted is opposed to district formation), then the district will not be formed. If, however, a weighted majority (50% or more) is in favor of the assessment, then the City Council may adopt the resolution to establish the proposed Laurel Property Business Improvement District of 2005 (PBID).

The estimated annual income of the proposed district is \$157,607 subject to a 5% per year maximum increase over the proposed ten year life of the PBID.

FISCAL IMPACTS

No fiscal impact is anticipated to the City. Similar to existing the BIDs, the proposed district will be self-funded and self-administered. It will pay all of its own operating costs and will be cost neutral to the City budget.

If the district is formed, the County of Alameda will add the related assessment as a line item to the annual property tax bill of each owner, and remit the amount collected (minus the County's collection fee) to the City's Treasury Division for safekeeping.

Item A.1
City Council
July 19, 2005

The Treasury Division will then release the funds to a non-profit management corporation which will be established to operate the district. Until released, BID assessments are held in special trust funds established by the Treasury Division on behalf of individual districts. The fund number for the proposed Laurel PBID will be: Miscellaneous Trusts Fund (7999)/NCR & SDS Org (88569)/Pass Thru Assessments Account (24224)/Undetermined Project (0000000).

BACKGROUND

In November 1999 the City Council approved the Oakland Business Improvement Management District Ordinance (Ordinance 12190). The ordinance allows for the formation of property-based assessment districts to undertake a range of services independent from government to further the development and economic viability of an area. At the same time, the City Council authorized the initiation of the Neighborhood Business Improvement District Program (NBID) to assist interested parties in conducting feasibility studies and actions toward the establishment of business and property-based assessment districts. Under the City's new program the Laurel business district applied for and received a seed grant of \$7,500 (February 2004) and a subsequent NBID program loan of \$32,000 (October 2004). The seed grant was used to explore the preliminary feasibility of establishing a BID and the loan will enable the district to complete the BID formation process.

Both the seed grant monies and the loan funds have been administered by the City on behalf of the Laurel district to hire BID consultant, New City America, to assist the district in organizing its BID formation efforts.

Pursuant to those efforts, in March 2005, the Laurel stakeholders group filed evidence of support for the proposed formation of the Laurel PBID of 2005 in the form of petitions signed by property owners representing more than 30% of total projected assessments. Consequently, on May 17, 2005 the City Council adopted a resolution of intention (Resolution No. 79223 C.M.S.) to form the Laurel Property Business Improvement District of 2005, granting preliminary approval of the management plan, directing filing of the proposed assessment district boundary description, submitting a proposed assessment to the affected property owners for majority protest procedure approval, and scheduling a public hearing for July 19, 2005.

The resolution also authorized the mailing of ballots to each affected property owner pursuant to the Oakland BIMD Ordinance and State Proposition 218. The results of the balloting along with related public testimony will be heard at the July 19, 2005 public hearing.

The PBID model for economic development is also being used in the Rockridge (established 2000), Fruitvale and Montclair (both established 2001), Lakeshore/Lake Park (established July 2002) and Temescal/Telegraph Avenue (established 2004) districts and in other commercial neighborhoods throughout the country.

KEY ISSUES AND IMPACTS

There is no anticipated adverse impact associated with the formation of the Laurel PBID. However, if the formation succeeds, program guidelines state that the City is expected to maintain a base level of service within the PBID area equivalent to the level prior to establishment of the assessment

district. Reductions may occur only in the instance of proportional adjustments throughout the city resulting from changes in the City's overall financial condition.

In terms of positive impacts, authorizing the formation of the district will provide the Laurel PBID an ongoing private funding source for enhanced safety and security, beautified physical appearance, and organized economic development and marketing activities within the district. Accordingly, formation of the Laurel PBID will enable the district to serve as an ongoing self-help model for other Oakland business districts.

PROGRAM DESCRIPTION

The Laurel Property Business Improvement District will fund the Laurel Management District Plan, developed through a series of meetings with affected property owners over the last year. The plan sets forth actions which will establish various programs to attract business and improve the commercial climate within the district. Key aspects of this document include, but are not limited to, additional security; sidewalk cleanup; development of district marketing materials; sponsorship of special events; and organized district representation.

The proposed district encompasses approximately 86 parcels located in and around the Laurel commercial area and projects an annual budget of approximately \$157,607. Assessments are based on lot size, building square footage, linear frontage and use of properties located within the proposed district and by law must be in proportion to the anticipated benefit received by each property.

The Laurel PBID of 2005 will have a non-profit management corporation contracted by the City to handle district operations. The City-appointed Laurel Advisory Board will also be charged with monitoring service delivery within the district and submitting annual service plan reports, including budgets, to the City. The board is required to have at least one member who is a business licensee within the district who is not also a district property owner.

SUSTAINABLE OPPORTUNITIES

Economic: The proposed levy will fund activities which are intended to support the eventual increase of property, sales, and business tax revenues as well as increased job opportunities and economic development of the Laurel commercial district.

Environmental: The proposed levy will enable the Laurel PBID of 2005 to continue its efforts to strengthen and beautify the physical image of the existing neighborhood commercial area through the implementation of services such as enhanced sidewalk cleaning to uplift the district's appearance.

Social Equity: PBIDs incorporate members of a business community into a productive and proactive entity representing the interests of that community. Administration of the cash flow generated by the district itself contributes to local entrepreneur self-empowerment and provides enhanced services for the betterment of the district.

DISABILITY AND SENIOR ACCESS

The authorization of assessments for the PBID has no direct implications for disability and senior access. However, the PBID's efforts toward revitalization may encourage businesses to continue to abide by applicable state, federal and local codes and legislation regarding disability and senior access. Improved public safety and security provided by the PBID could also serve to make the area safer and more accessible to all visitors, including senior citizens and disabled persons.

RECOMMENDATION(S) AND RATIONALE

Adoption of the attached resolution will support the formation of the Laurel Property Business Improvement District of 2005 and its planned activities. Such business improvement districts represent a proactive effort on the part of neighborhood business owners to improve the conditions and image of their area and to participate in the economic revitalization and beautification of their district.

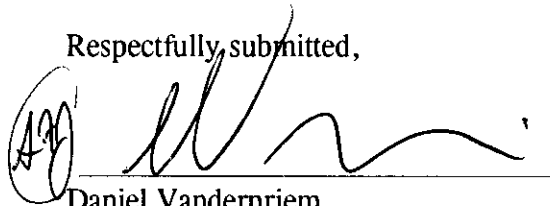
Additionally, because PBIDs are self-initiated, self-funded, and self-administered entities, there are no anticipated fiscal impacts for the City associated with formation of the Laurel PBID.

Consequently, the Laurel PBID of 2005 should be viewed as a positive self-help model for other neighborhood commercial areas. Accordingly, staff recommends that the City Council adopt the resolution establishing the Laurel Property Business Improvement District of 2005.

ACTION REQUESTED OF THE CITY COUNCIL

The action requested of the City Council is to adopt the resolution establishing the Laurel Property Business Improvement District of 2005, approving the management plan, directing filing of the proposed assessment district boundary description, making a determination with regard to the majority protest procedure for approval of the proposed assessments, and approving the assessments for the district.

Respectfully submitted,



Daniel Vanderprien
Director of Redevelopment,
Economic Development and Housing

Prepared by:
Maria Rocha, Urban Economic Analyst III
Neighborhood Commercial Revitalization

APPROVED AND FORWARDED TO THE
CITY COUNCIL



OFFICE OF THE CITY ADMINISTRATOR

Skeltor

OAKLAND CITY COUNCIL

FILED
OFFICE OF THE CITY CLERK
OAKLAND

RESOLUTION NO. _____ C.M.S. 2005 JUL -7 PM 2:31

RESOLUTION ESTABLISHING THE LAUREL PROPERTY BUSINESS IMPROVEMENT DISTRICT OF 2005, APPROVING THE MANAGEMENT PLAN, DIRECTING FILING OF THE PROPOSED ASSESSMENT DISTRICT BOUNDARY DESCRIPTION, MAKING A DETERMINATION WITH REGARD TO THE MAJORITY PROTEST PROCEDURE FOR APPROVAL OF THE PROPOSED ASSESSMENTS; AND APPROVING THE ASSESSMENTS FOR THE DISTRICT

WHEREAS, the City Council of the City of Oakland enacted the City of Oakland Business Improvement District Ordinance (Chapter 4.48, Ordinance 12190, 1999) establishing the procedures for the formation of Business Improvement 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 Laurel district have duly petitioned to form the Laurel Property Business Improvement District of 2005 ("District") under the City of Oakland Business Improvement District Ordinance (the "BIMD Ordinance") to form the District and have proposed the Management Plan for the operation of the District ("Plan") (**Exhibit A**); and

WHEREAS, the Plan contains a detailed engineer's report prepared by a registered professional engineer recognized by the State of California; and

WHEREAS, the Plan was prepared in accordance with the provisions Article XIII of the California Constitution, and has been filed with the City Clerk for proceedings in formation of this district; and

WHEREAS, the Plan, incorporated by this reference, provides for new security, crime prevention, sidewalk maintenance, promotional, and marketing activities and improvements of particular benefit to the properties located within the District (as more specifically identified in the Plan attached hereto); and

WHEREAS, the Plan was prepared in accord with the provisions of the BIMD Ordinance overseeing the formation of the District as referenced above, and has been filed with the City Clerk for proceedings in formation of this District; and

14.1

ORA/COUNCIL

WHEREAS, the City Council of the City of Oakland adopted a Resolution of Intention to form the Laurel Property Business Improvement District of 2005 on May 17, 2005;

NOW, THEREFORE, the City Council of the City of Oakland finds that the Management Plan for the District 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 Districts, and does hereby find, determine and resolve as follows:

1. A Business Improvement District is hereby established pursuant to the BIMD Ordinance with the boundaries as specified in the Plan on file in the office of the City Clerk, a copy of which is attached hereto as **Exhibit A**.
2. 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 District.
3. The Plan for the District, is approved and the assessments for the first year shall be as provided for in the Plan (**Exhibit A**) and in the assessment roll contained in the appendix to the Plan (**Exhibit A**) and are incorporated herein by this reference
4. The name of the District shall be the Laurel Property Business Improvement District of 2005.
5. The types of the improvements and activities proposed to be funded and acquired by the levy of assessments on property in the District and the time period for which the proposed improvements are to be made shall be those specified in the Plan on file in the office of the City Clerk and attached hereto (**Exhibit A**).
6. The improvements and activities to be provided in the District will be funded by the levy of assessments. An assessment will be levied annually to pay for all improvements and activities within the area. The revenue from the levy of assessments within the District shall not be used to provide improvements or activities outside the district or for any purpose other than the purposes specified in the Resolution of Intention as modified by the City Council at the hearing concerning the establishment of the district as specified in this Resolution.
7. The boundaries of the District and of each separate benefit zone within the district shall be those delineated in the description contained in the Plan which is on file in the office of the City Clerk and a copy of which is attached hereto (**Exhibit A**).
8. The proposed method and basis of levying the assessments to be levied against each property in the District are based on the lot size, building size, linear frontage and use of properties located within the District as more specifically stated in the

plan on file in the office of the City Clerk and attached hereto and incorporated herein by this reference (**Exhibit A**).

9. The assessments for the entire District total \$157,607 for the first year of the District, and the amount chargeable to each parcel shall be as shown in the Plan on file in the office of the City Clerk and on the appendix to **Exhibit A** attached hereto.
10. The District shall be in existence for a period of ten (10) years during which a maximum 5% increase per year in the amount of the assessment on each property shall be allowable.
11. The assessment shall be attached to the property and collected with the annual county property taxes, and in certain cases, as specified in the Plan, through a special municipal billing.
12. The City Council of the City of Oakland adopted a Resolution of Intention to form the Laurel Property Business Improvement District of 2005 on May 17, 2005, Resolution No. 79223 CMS. The title of the Resolution of Intention is **RESOLUTION OF INTENTION TO FORM THE LAUREL PROPERTY BUSINESS IMPROVEMENT DISTRICT OF 2005, GRANTING PRELIMINARY APPROVAL OF THE MANAGEMENT PLAN, DIRECTING FILING OF THE PROPOSED ASSESSMENT DISTRICT BOUNDARY DESCRIPTION, SUBMITTING A PROPOSED ASSESSMENT TO THE AFFECTED PROPERTY OWNERS FOR MAJORITY PROTEST PROCEDURE APPROVAL; AND SCHEDULING A PUBLIC HEARING FOR JULY 19, 2005.**
13. A Public Hearing was held at 7:01 p.m. on July 19, 2005 at City Hall, One Frank H. Ogawa Plaza, Oakland California in the City Council Chambers, to hear all public comments, protests, count the returned ballots as to the formation of the District, appoint the Advisory Board for the District, and take final action as to the formation of the District. At the hearing the testimony of all interested persons for or against the establishment of the District, the boundaries of the District, or the furnishing of the specified types of improvements or activities was heard. All protests, both written and oral, are overruled and denied and the City Council finds that there is not a majority protest within the meaning of the Oakland Business Improvement District Ordinance (Chapter 4.48, Ordinance 12190, 1999).
14. The City Council finds, determines and declares that the District and each parcel therein is benefited by the improvements, maintenance, and activities funded by the assessment to be levied, including all expenses incurred incidentally thereto, upon the lots and parcels of real property in proportion to the estimated benefits to be received as specified in the Management District Plan and engineer's report included therein.

15. The City Clerk shall record a notice and map describing the assessment district pursuant to California Streets and Highways Code Division 4.5 (commencing with Section 3100).
16. Properties in the District shall be subject to any amendments to the Oakland Business Improvement District Ordinance (Chapter 4.48, Ordinance 12190, 1999).
17. The City Administrator is hereby authorized to enter into annual contracts with any nonprofit corporation comprised of the assessees themselves designated by the owners through the Advisory Board for the District for the landscaping, security, programming, maintenance, or other activities and improvements for the District, or at the request of the owners through the Advisory Board to conduct or contract for such services and improvements as provided for in the BIMD Ordinance.

IN COUNCIL, OAKLAND, CALIFORNIA, _____, ____

PASSED BY THE FOLLOWING VOTE:

AYES- BRUNNER, CHANG, , BROOKS, NADEL, REID, , QUAN, KERNIGHAN and PRESIDENT DE LA FUENTE

NOES-

ABSENT-

ABSTENTION-

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

14.1
ORA/COUNCIL
JUL 19 2005



Marco Li Mandri, President • www.newcityamerica.com

FINAL PLAN

**MANAGEMENT DISTRICT PLAN FOR THE
LAUREL DISTRICT
PROPERTY BUSINESS IMPROVEMENT DISTRICT
OAKLAND, CALIFORNIA**

*Prepared pursuant to the City of Oakland's
Business Improvement Management District Ordinance of 1999
12190, Under Municipal Code Chapter 4.48
for the Laurel Business District*

Prepared for:

**Laurel Merchants' Association/P.B.I.D. Steering Committee
City Councilwoman Jean Quan
Neighborhood Commercial Revitalization Program
Community Economic Development Agency - City of Oakland**

by

**Marco Li Mandri, President
NEW CITY AMERICA INC.
(888) 356-2726**

MAY 1, 2005



**LAUREL DISTRICT MANAGEMENT DISTRICT PLAN FOR THE
NEW PROPERTY BUSINESS IMPROVEMENT DISTRICT –
FINAL PLAN – MAY 2005**

*(Formed under the Business Improvement Management District Ordinance
12190, Passed November 1999, Chapter 4.48 City of Oakland Municipal Code)*

**SECTION 6 - MANAGEMENT DISTRICT PLAN, PROPERTY
BUSINESS IMPROVEMENT DISTRICT**

- 1. MAP OF THE DISTRICT**
- 2. NAME OF THE PROPOSED DISTRICT**
- 3. DESCRIPTION OF BOUNDARIES OF THE DISTRICT**
- 4. THE IMPROVEMENT AND ACTIVITIES PROPOSED EACH YEAR**
- 5. TOTAL ANNUAL AMOUNT PROPOSED TO BE EXPENDED FOR IMPROVEMENT,
MAINTENANCE AND OPERATIONS**
- 6. THE PROPOSED SOURCE(S) OF FINANCING INCLUDING THE PROPOSED
METHOD AND BASIS OF LEVYING THE ASSESSMENTS**
- 7. THE TIME AND MANNER OF COLLECTING THE ASSESSMENTS – TERM AND
DISESTABLISHMENT PROCEDURES**
- 8. PROPOSED RULES AND REGULATIONS TO BE APPLICABLE IN THE DISTRICT**
- 9. ADVISORY BOARD AND MANAGEMENT OF THE DISTRICT**
- 10. ENGINEER'S REPORT**

APPENDIX:

PARCEL LIST

LAUREL DISTRICT PROPERTY BUSINESS IMPROVEMENT DISTRICT MANAGEMENT DISTRICT PLAN – ROUGH DRAFT EXECUTIVE SUMMARY

The Laurel business district is a vibrant place with a rich history and changing demographics. The architectural charm, the new improvements in the public rights of way, the reservoir of high disposable income in the peripheral blocks leading up the hillside, easy access to the freeway - are all assets which make this an attractive and desirable business district. All of the elements are present to expedite the revitalization process along MacArthur Blvd. What is needed now is the catalyst, or the power of the business and property owners to take the district to the next level.

This new catalyst would be known as the Laurel Property Business Improvement District (PBID). Any and all assessments generated from the formation of the district would, by law, be required to stay in the district's boundaries to fund special benefit services. The district's assessment revenues would be controlled by a new non-profit organization of the property owners paying into the district.

Background:

Over the past ten years, discussions were held by affected business and property owners regarding eliminating traffic lanes, installing bike lanes and doing a number of other things that might have had a negative impact on the business community. After a long and deliberative process, consensus was reached that the old sidewalks, streetlights and landscaping should be replaced and the area re-designed to be more pedestrian friendly.

Working with the City Council office, a Metropolitan Transportation Grant was applied for and given to the Laurel business district. After a competitive bidding process, a \$150,000 matching grant was awarded to improve the streetscape for MacArthur Blvd. After much excitement following the grant announcement, not much happened. It took renewed effort by Councilwoman Quan's office to get the right contractor to perform the streetscape improvements within budget. On June 11th, a letter was issued from the Oakland Public Works Dept. stating that construction on the streetscape improvements would be conducted by Ray's Electric and run from mid-June to this October. Signs of those improvements are everywhere on the street at this time.

The scope of the capital improvements are to include construction of new sidewalks, installation of crosswalks, curbs, gutters, driveways, curb boxes, traffic signals, storm drains and irrigation systems, installation of gateways and street furniture. This significant work should leave a permanent mark on the community. But once it is done, how will it be maintained? How will it look in six months?

Over the course of the last six to eight months, business and property owners have been considering the formation of a "*property business improvement district*" to strengthen the image of the business district, attract new retail businesses, fund beautification efforts, and maintain the integrity of the new streetscape improvements. As is normally the case throughout the State of

California, a city will fund the capital improvements in a business district and the affected property owners will maintain those capital improvements.

The purpose of this district would be to fund *special benefits* for the public rights of way, over and above the current level of services funded by the City of Oakland. This new district would be known as the Laurel Property Business Improvement District, (PBID). Any and all assessments generated from the formation of the district would, by law, be required to stay in the district's boundaries to fund special benefit services. The district's assessment revenues would be controlled by a new non-profit organization of the property owners paying into the district.

SURVEY OF THE LAUREL PROPERTY OWNERS:

In early 2004, a grant was secured through the City of Oakland's Neighborhood Commercial Revitalization Program, which funded the investigation of the Laurel PBID. In the first six months of 2004, two separate surveys were mailed to property owners encouraging them to respond and demonstrate their level of support for the creation of the new district. Normally, such surveys of property owners are responded to by no more than 10% of the participants.

Property owners supporting the investigation of this special benefits district were divided up by those variables common to each parcel: lot size, building size and linear frontage. Due to Proposition 13, properties would not be assessed based upon their valuations, since they vary based upon the date of ownership. Rather, assessments that fund the special benefits, are derived from those factors that are common to each parcel. Therefore, the level of support or opposition to the district is based upon those common factors.

The survey results were quite impressive. It is clear that there appears to be significant support for the continued investigation and eventual formation of this new Laurel Property Business Improvement District. *The district would fund special benefits only, and by law, could not replace existing general fund Oakland City services to the community.* Thirty-six property owners, half of the property owners in the study area, responded to the survey representing the following factors.

Response from total database of property owners including all parcels along MacArthur Blvd. from 35th to High Street: (Database as of January 10, 2005)

Total Lot Size:	624,719 square feet
Total Linear Frontage:	8,016 linear feet
Total Building Square Feet:	346,619 square feet
Total number of parcels:	86
Total number of property owners:	72 property owners

<i>Property Variable</i>	<i>Support</i>	<i>Oppose</i>	<i>No Opinion</i>
Lot Size	314,109 sq. feet	47,000 sq. feet	39,259 sq. feet
Linear Frontage	3,077 linear feet	678 linear feet	613 linear feet
Building Size	158,746 sq. feet	38,105 sq. feet	15,838 sq. feet

Therefore, the results reveal that 80% of the responding property owners by total lot size, 71% of the responding property owners by total linear frontage and 93% of the responding property owners by total building size in the district boundaries supported continued formation efforts of the Laurel PBID. This is a significant show of support for the district's future.

The specific answers in the survey results revealed the following information and interests...

- *55% of the respondents have owned their property for 10 years or longer;*
- *77% of the respondents were sole proprietors or family owned parcels;*
- *59% of the respondents believe that the image of Oakland, over the past few years, has negatively impacted their property;*
- *88% of the respondents believe that the district is "unsafe" or "safe, however suffers an image as an unsafe district";*
- *69% of the respondents would support property owner funded enhanced security services;*
- *74% of the respondents would support property owner funded services which would prioritize dealing with people demonstrating questionable behavior in the public rights of way;*
- *59% of the respondents would support property owner funded sidewalk and gutter sweeping;*
- *58% of the respondents would support property owner funded enhanced tree maintenance to beautify the district;*
- *64% of the respondents would support property owner funded planning and economic development related services to give input to proposed planning and zoning changes that would impact this district;*
- *73% of the respondents would support property owner funded marketing and promotions to bring new business and attract new tenants to the area;*
- *69% of the respondents would support property owners funded special events to improve the identity of the district;*

Legal Description: The proposed Laurel PBID is an assessment District set up to fund "special benefits" as described in the Management Plan. The district is subject to rules of local enabling ordinance as well as the mail balloting procedure guidelines of Proposition 218 (Article XIID of California State Constitution).

Address Series:

3500 – 4276 MacArthur Blvd.
4011 Masterson
3535 - 3615 35th Avenue
3611 Loma Vista

Benefit Zones:

It is recommended that there be one benefit zone in the district. This would include all parcels fronting onto MacArthur from 35th to High Street. Thus lot size and linear frontage costs would be equally applied throughout the district. Only the land use (building) will determine whether this factor is assessed.

WHY IS THIS BEING CONSIDERED?

It is best when community dollars stay in the community. Dollars that leave the neighborhood and enrich other cities such as Berkeley, Emeryville and Alameda, are referred to as “leakage”, this is something neither the City nor the Laurel Business District can afford. The whole purpose of the PBID is to keep local dollars in the community, attract commerce from outside of the district, provide services for enhanced sidewalk sweeping and trash pick up, beautify the neighborhood and fund those special benefit services which are not and will not be funded by the City of Oakland.

Similar districts are currently functioning in the Rockridge, Montclair, Fruitvale and in the Lakeshore business districts. A PBID was recently overwhelmingly approved by Temescal/Telegraph Avenue property owners through a mail ballot vote of the property owners. Other district formations are underway on Webster Avenue in Alameda, Point Richmond and throughout the City of San Francisco.

WHY HERE, WHY NOW?

Business districts that have organized into BIDs, in fact, are able to extract a greater level of services from their City due to the fact that their management staff is in constant contact with City departments to ensure that the City is providing its committed level of general services.

The new proposed Laurel Property Business Improvement District, formed under a new City enabling ordinance, is a benefit assessment district proposed to *confer special benefit services* to real property owners in and around the commercial corridors of the business district. The district, also known as a *Management District*, will provide minor capital improvements, special improvements and activities in the combined business district. These special benefit services shall include landscaping, beautification, maintenance and sidewalk cleaning/steaming, installing decorations, marketing and promotions, improvement of the image of the district, business interest advocacy, and possibly security services, (above those currently provided by the City of Oakland).

The district is envisioned to be established for 10 years commencing January 1, 2006. Provisions for annual disestablishment are available if the property owners no longer desire to fund the special services articulated in this plan.

PROPERTY VARIABLES TO BE ASSESSED:

Three property variables will be used to fund the special benefit services of the district. Those variables will include: lot or parcel size, building square footage, and linear frontage. Each of these variables can be verified by County records. Building square footage will be further categorized by “use”, (retail, hotel, church, public building, office, etc). Use determines needs and therefore special benefit to be received. By law, the assessments within the district can only fund *special benefits*, not general benefit services.

Assessment Methodology:

In this Management District Plan, different special benefit services have their costs apportioned to the relevant and benefiting property variable, in this case 50% to lot size, 50% to linear frontage. For example, sidewalk sweeping, tree maintenance, graffiti removal and other

services performed within the public rights of way are apportioned to a combination of linear frontage and lot size. District Identity is apportioned to retail building uses. Administration and contingency are apportioned 50% to building square footage and 50% to lot size. Contingency/Reserve will be apportioned 100% to lot size.

Other land uses would be assessed differently based upon their classification as retail, professional, industrial/manufacturing/distribution, single-family homes, multi-unit residential. In addition, a "condo assessment" would be levied in the form of a flat fee cost for all future "for sale" mixed use developments in the district.

Condo owners, which currently don't exist in the district, would pay a flat fee, which would underwrite seven days per week services in the public rights of way. Their use of the district is qualitatively different than retail, professional or institutional. Condo units are to be assessed at an annual rate of \$240.00 flat fee, once the unit has been parceled. The parcels which have been converted to condos will have the individual property owners assessed only for the condo unit, and will be exempted from lot size, building size and linear frontage.

SERVICES TO BE FUNDED:

The primary special benefits to be funded by the creation of the district will be related to maintaining order and cleanliness in the public rights of way. After order and beautification, district identity and promotional programs will be funded. Finally, a component for administration/corporate affairs and contingency/reserve will be included in the budget. Consistent with local legislation, the district shall remain in place for ten years with provisions for annual CPI adjustments as well as annual disestablishments procedures.

ANNUAL BUDGET:

The annual first year budget is \$157,607. Each parcel has been analyzed to determine proper category of use and therefore benefit: (Internal parking built into structure will be credited to overall building size).

ADMINISTRATION:

The proposed Laurel Property Business Improvement District will be administered by a yet-to-be-formed non-profit management corporation comprised of all property owners within the district. Accommodations should be made on the Board of Directors to include large and small property owners, representatives from each land use, as well as business tenants based in the district. Once the district has been established, steps will be taken to establish this new corporation and enter into a contract for administration with the City of Oakland.

The management corporation, once formed, will create a number of policies which will help the Board of Directors to effectively manage the district. Such policies may include, but not be limited to: a decision making policy, use of banner policy, special event underwriters policy and an economic hardship policy.

Commencement, Termination and Disestablishment:

The district's first assessments will be collected with 2005-06 property tax cycle, with the first installments due in December 2005. The district would commence operations January 1, 2006 and expire on December 31, 2015. Provisions in the local enabling ordinance provide for annual disestablishment procedures, based upon the same method that establishes the district.

Establishment Process:

The district is established pursuant and in accordance with the local enabling ordinance, as well as assessment mail ballot procedures as laid out in the 218 Omnibus Act of 1998. In early March, the Laurel PBID Steering Committee adopted this Management District Plan. That plan lays out the special benefit services to be funded, the boundaries, the term of the district, costs, etc. A petition representing 30% of those who will pay into the district by weight, was submitted to the City in early April, triggering the mail ballot procedure. Once the ballots are mailed out, the district is established if the weighted majority of return ballots endorse the district's formation. Using the budget of \$157,607 per year, property owners representing at least \$47,282 in annual assessments (30%) were required to sign the petition to trigger the balloting.

ANNUAL ADJUSTMENTS:

The Board of Directors of the new Management Corporation *will be given the option to increase* the assessments annually based upon the Alameda County regional CPI indicator or by an amount not to exceed 5% from the previous year's assessments.

The Management Corporation shall have the right to shift allocations within the four categories as they feel appropriate and as long as it remains consistent with the intent of the plan. The Board shall also have the right to shift up to 10% per year from category to category, each year, as needs change with the priorities of special benefits.

December 2005

The PBID assessments appear for the first time on the 2005-06 property tax bills. The assessments are collected with the property taxes and sent to the City of Oakland. The City of Oakland then enters into a contract with a non-profit corporation of property owners within the Laurel PBID area to manage the district and deliver special benefit services to the assessed property owners.

14.1
ORA/COUNCIL
JUL 19 2005

1. MAP OF THE DISTRICT:

A map of the district will be found at the end of the text of this Management District Plan.

2. NAME OF THE PROPOSED DISTRICT:

The name of the proposed special benefits district is the “Laurel Property Business Improvement District of 2005”.

3. DESCRIPTION OF THE BOUNDARIES OF THE DISTRICT

This district as envisioned is approximately square blocks. Its boundaries are primarily along the following streets:

<i>Street</i>	<i>Address Series</i>
MacArthur Blvd.	3500 - 4276
Masterson	4011
35 th Avenue	3535 – 3615
Loma Vista	3600

4. THE IMPROVEMENT AND ACTIVITIES PLANNED FOR EACH YEAR

Based upon the survey results of the property owners, and estimated costs and services, the preliminary special benefits funded by the Laurel Property Business Improvement District are as follows: (These are suggested programs or projects to be funded by the general line items)

Proposed Laurel PBID services plan:

- Public Rights of Way and Sidewalk Operations (P.R.O.W.S.O.)
 - Sidewalk sweeping;
 - Security;
 - Beautification;
 - Decorations and banners;
 - Enhanced trash receptacle placement and regular emptying;
 - Removal of bulky items;
 - Graffiti removal;
 - Work with City on hazardous issues;
 - Maintenance of public order in the sidewalks;
 - Equipment, supplies, tools;
 - Vehicle maintenance and operation;

- District Identity and Streetscape Improvements
 - Special events;
 - Web site;
 - Walking map;
 - Communications;

- Administration and Corporate Operations:
 - Staffing;
 - Insurance policies;
 - Office related expenses;
 - Misc.

- Contingency/Reserve:
 - Delinquencies;
 - City costs;
 - County costs;
 - Hardship;
 - Reserves;

These basic services, categorized by percentages of the overall budget shall form the basis for the special benefit services budget for the ten-year period the district is in place. The Management Corporation shall have the right, with concurrence of the Advisory Board to shift categories of expenses up to 10% per year, based upon determined need of the district. This ten per cent shift is allowable after any CPI or annual increase has been taken into account.

Consistent with the law, any property assessment district must confer a special benefit to real property owners paying into the assessment district.

Benefit Zones:

There will be one benefit zone in the district. All 86 parcels along MacArthur from High to 35th Avenue will be considered to derive equal benefit from the establishment of the PBID.

5. TOTAL ANNUAL AMOUNT PROPOSED TO BE EXPENDED FOR IMPROVEMENT, MAINTENANCE AND OPERATIONS, DISTRICT IDENTITY, ADMINISTRATION AND CONTINGENCY/RESERVE

BUDGET: The first year annual budget is projected to be \$157,607. Annual adjustments of up to a maximum of 5% over the previous year's gross assessment amount are allowable, subject to the approval of the Laurel Property Business Improvement District Management Corporation.

TABLE 1 – SPECIAL BENEFIT P.R.O.W.S.O. SERVICES BROKEN DOWN BY ESTIMATED COSTS:

<i>Public Rights of Way and Sidewalk Operations (PROWSO)</i>	<i>Task frequency</i>
Sidewalk Sweeping	As determined by Management Corporation
Trash Emptying	As needed, assumes a series of new trash receptacles and the current level of City baseline service of Monday through Saturday pick ups left intact
Security	As determined by Management Corporation
Banner installation and maintenance	Seasonally
Holiday decorations	Seasonally
Reporting hazards to City	As needed
Removal of bulky items	Within 24 hours - if desired above City standard of pickup within 72 hours
Graffiti removal	Within 24 hours if desired above City standard of 48 hours, (in public rights of way only)
Tree and shrub planting and maintenance	Weekly or as need
Miscellaneous	As needed

This is simply a tool for calculating costs of maintenance personnel. The free market, and competitive bidding may produce higher and better results. It is the job of the management corporation to maximize the delivery of special benefit services to the property owners based upon various category and line items of services. The function of this crew is to deal with *all services in the public rights of way, including but not limited to:* sweeping, beautification, decorations, security, etc.

TABLE 2 – TOTAL ESTIMATED P.R.O.W.S.O. ANNUAL COSTS

ITEM	ANNUAL ESTIMATED COSTS
<i>Total Estimated Annual Costs</i>	<i>\$ 95,000.00</i>

TABLE 3 – SPECIAL BENEFIT SERVICES/DISTRICT IDENTITY AND STREETScape IMPROVEMENTS SUGGESTED LINE ITEM ALLOCATION

POSSIBLE PROGRAM TO BE FUNDED	ESTIMATED FIRST YEAR ANNUAL COST
Special Events funded by Building Use Code "A"	
<i>Total Estimated Annual Costs</i>	<i>\$ 19,000.00</i>

TABLE 4 – SPECIAL BENEFIT SERVICES/ADMINISTRATION AND CORPORATE OPERATIONS SUGGESTED LINE ITEM ALLOCATIONS

POSSIBLE PROGRAM TO BE FUNDED	ESTIMATED FIRST YEAR ANNUAL COST
<i>Total Estimated Annual Costs</i>	<i>\$ 35,000.00</i>

TABLE 5 – SPECIAL BENEFIT SERVICES/CONTINGENCY –
RESERVE ANTICIPATED NEED

<i>Possible Program or Set Costs to be Funded</i>	<i>Estimated First Year Cost</i>
<i>Total Estimated Annual Costs</i>	<i>\$8,607.00</i>

TABLE 6 – TOTAL FIRST YEAR SPECIAL BENEFIT SERVICES BUDGET
LINE ITEMS BASED UPON SUGGESTED PROGRAMS AND ALLOCATIONS

SERVICE OR CATEGORY OF SPECIAL BENEFIT TO BE FUNDED	ESTIMATED FIRST YEAR COST	% OF TOTAL FIRST YEAR BUDGET	APPORTIONED TO SPECIFIC PROPERTY VARIABLE
Public Rights of Way and Sidewalk Operations/Beautification (Personnel and Equipment)	\$ 95,000	60%	50% of costs to Linear Frontage 50% of costs to Lot Size Building Code H (Condos)*
District Identity and Streetscape Improvements	\$ 19,000	12%	50% to Lot size 50% to Building Square Footage, Building Use "A" retail, only
Administration and Corporate Operations	\$ 35,000	22%	50% to Lot Size 50% to Building Size, A, B, C, D, E, F
Contingency/Reserve	\$ 8,607	6%	100% to Lot Size
<i>Total Budget</i>	<i>\$ 157,607.00</i>	<i>100%</i>	

*No Condos currently exist in the district. Once condos have been parceled in the future mixed-use developments, the \$240.00 annual flat condo fee will be apportioned to the PROWSO portion of the budget to provide the new residents with seven day per week cleaning services and possible supplemental security.

LAUREL PBID PROPERTY VARIABLES – JANUARY 2005

<i>Property Variables</i>	<i>Total in District</i>
Lot Size	624,719 Square Feet
Building Size	346,619 Square Feet
Linear Feet	8,016 Linear Feet

BUILDING TYPE	A	B	C	D	E	F	G
BUILDING SQUARE FOOTAGE/DATABASE AS OF 2/25/05	248,851	32,034	2,416		12,598	49,293	1,427

TABLE 7 - APPORTIONMENT OF BUILDING USES:

(EACH PARCEL AND ITS BUILDING USE HAS BEEN CATEGORIZED IN THE DISTRICT. SOME SPECIAL BENEFIT SERVICES ARE ALLOCATED TO SPECIFIC BUILDING USES, OTHER BUILDING USES ARE EXEMPT FROM PAYMENT INTO THAT SPECIFIC SERVICE, BASED UPON ANTICIPATED BENEFIT)

<i>Building Use Code</i>	<i>Description of Use</i>
A	Retail space, hotels, motels, visitor related
B	Office and Commercial uses, Independent, free standing parking structures
C	Industrial/Manufacturing/Distribution
D	Institutional (City, County, Water District, School, public utility, parks, etc.)
E	Church, non-profit, tax-exempt
F	Multi-unit housing, apartments
G	Single Family housing units (used as residential, not to exceed \$240 per year)
H	Condo units - \$240.00 flat fee per year, once parceled. The parcels on which condos have been built, will have the individual property owners assessed only for the condo unit, and will be exempted from lot size, building size and linear frontage
I	Non-functional building structures, parking structures

ANNUAL COST:

TABLE 8 – LAUREL PBID FIRST YEAR COSTS BY PROPERTY VARIABLE

<i>Property Variable</i>	<i>Annual Cost</i>	<i>Building Use Code Applied</i>	<i>Total Generated by Variable</i>
Lot Square Footage	\$ 0.13365 per square foot per year	No	\$ 83,493.00 (53%)
Building Square Footage (range)	\$ 0.04976 through \$ 0.8743 per square foot per year based upon building type: Building type A: \$0.08743 Building type B - G: \$0.04968 Building type H: \$ 240.00 flat fee, no linear frontage or lot size assessment Building type I: \$0.0	Yes	\$ 26,614.00 (17%)
Linear Frontage	\$ 5.9256 per linear foot per year (assessed on all sides receiving PROWSO benefits)	No	\$ 47,500.00 (30%)
Single Family Home and Condo Annual Fee	\$ 240.00 (No condos currently exist in the district but are anticipated within 10 years)	Yes	\$ 0.0 (%)
TOTAL ANNUAL BUDGET			\$157,607.00 (100%)

SAMPLE ASSESSMENT FORMULATION ACCORDING TO THE PLAN:

The following represents three examples on calculation of the annual assessments:

<i>Type of Building</i>	<i>Lot Size</i>	<i>Building Size</i>	<i>Linear Frontage</i>	<i>Annual Costs</i>
Office	3,850 square feet x \$ 0.13366 = \$ 514.59	898 square feet x .04968 = \$ 44.61	35 linear feet x \$ 5.9256 = \$ 207.39	\$ 766.59
Burger Place	12,000 sq. ft x \$ 0.13365 = \$ 1,603.80	6,000 square feet x .08743 = \$ 524.58	120 linear feet x \$ 5.9256 = \$ 711.07	\$ 2,839.45
Church	11,650 sq. ft x \$ 0.13365 = \$ 1,557.02	8,000 square feet x .04968 = \$ 397.44	113 linear feet x \$ 5.9256 = \$ 669.59	\$ 2,624.05
Parking Lot	5,000 sq ft. x \$ 0.13365 = \$ 668.25	0	50 linear ft x \$ 5.9256 = \$ 296.28	\$ 964.53

COMPARISON OF LAUREL DISTRICT ASSESSMENT METHODOLOGY WITH SIMILAR BAY AREA PROPERTY BASED DISTRICTS

<i>District Name</i>	<i>Annual Lot square foot costs</i>	<i>Annual Building square foot costs</i>	<i>Annual Linear Front costs</i>	<i>1st year annual budget</i>
Union Square/SF	0	0	\$ 65.00	\$ 1,000,000.00
Lakeshore/Oakland	\$ 0.2543	0	\$ 21.86	\$ 137,000.00
Temescal/Telegraph (3 benefit zones)	\$ 0.0472 – \$ 0.7811	\$ 0.0234 – \$ 0.0609	\$ 6.815	\$ 240,000.00
North Shattuck/Berkeley	\$.0898	\$ 0.0805 – \$ 0.1342	\$ 11.219	\$ 140,000.00
Proposed Laurel	\$ 0.13365	\$.04968– .08743	\$ 5.9256	\$ 157,607.00

6. THE PROPOSED SOURCE(S) OF FINANCING INCLUDING THE PROPOSED METHOD AND BASIS OF LEVYING THE ASSESSMENTS

METHOD OF FINANCING:

This method of financing the special services is based upon the levy of assessments on real property that benefits from proposed improvements and activities. This represents a “benefit assessment district” as defined in the California Streets and Highway Code. Assessed valuation cannot be used as the basis for special benefits assessments due to the introduction of Proposition 13 into the state constitution in 1978.

There are at least four basic factors that will be used in determining individual assessments. These factors include 1) linear frontage, 2) land area and 3) building floor space, 4) building use. The assessments for the Laurel PBID are based upon these variables, which have been endorsed by the PBID Steering Committee as the most fair and equitable for apportionment of assessments

to participating parcels. Linear frontage will be assessed on all sides of a parcel due to the allocation of special benefit services to those various sides.

Land use changes will lead to changes in the assessment formulation per parcel. As the district transitions to a mixed-use community, the assessment methodology will accommodate these changes by generating additional revenues to mitigate the impact of these new residents and businesses.

No Condos currently exist in the district. Once condos have been parceled in the future mixed-use developments, the \$240.00 annual flat condo fee will be apportioned to the PROWSO portion of the budget to provide the new residents with seven day per week cleaning services and possible supplemental security. The parcels on which condos have been built, will have the individual property owners assessed only for the condo unit, and will be exempted from lot size, building size and linear frontage.

A P.B.I.D. is a practical “pay as you go” funding tool which allows property owners in a given designated area to be assessed, as part of the property tax collection tax process, to pay for supplemental or “special benefit services”. These special services are those, which are not normally provided by the City of Oakland. PBIDs are often associated with very visible and tangible program elements that, in turn, can produce very significant changes in the character and image of the district.

7. THE TIME AND MANNER OF COLLECTING THE ASSESSMENTS – TERM OF THE DISTRICT

The *Oakland Business Improvement Maintenance District mail ballot proceeding* is triggered with a successful petition drive by more than 30% of the property owners who *must pay* into the district. These petitions demonstrate stakeholder support for the district and trigger a Proposition 218 mail ballot procedure. The Property Business Improvement District will be established and function for a maximum of 10 years and must be re-established through a similar petitioning and balloting process at the end of its pre-designated life.

THE LAUREL PROPERTY BUSINESS IMPROVEMENT DISTRICT STEERING COMMITTEE HAS ELECTED TO ESTABLISH THE DISTRICT FOR THE MAXIMUM PERIOD OF 10 YEARS COMMENCING JANUARY 1, 2006 TO SAVE ON THE COSTS AND TIME REQUIRED TO RE-ESTABLISH THE DISTRICT WITHIN 4 - 5 YEARS.

As provided by local ordinance, the Laurel Property Business Improvement District (PBID), will appear as a separate line item on the annual property tax bills prepared by Alameda County tax collector. Property tax bills are generally distributed in the Fall and payment is expected by lump sum or in two installments. The County tax assessor shall distribute the assessments collected to the City of Oakland who will in turn then forward them to the designated Management Corporation pursuant to the authorization of this plan. Existing laws for enforcement and appeal of property taxes apply to the Management District assessments.

Disestablishment:

Local ordinance provides for the disestablishment of the PBID pursuant to an annual review process. Each year that the Laurel PBID is in existence, there will be a 30-day period during

which the property owners will have the opportunity to request disestablishment of the district. This 30-day period begins each year on the anniversary date that the district was first established by the City Council. Within that 30-day period, if a written petition is submitted by the owners of real property who pay 30% or more of the assessments levied, the PBID may be considered for disestablishment. The City Council will hold a public hearing on disestablishing the PBID prior to actually doing so. (Section 4.48.220)

Due to its long term nature, (10 years), the local enabling ordinance allows for the growth of landscaping, its maintenance as well as economic development strategies related to revitalization that create a more permanent improvement to the area. If there is debt against the District, the District cannot be disestablished, until all of the debt has been repaid. All financial obligations in the form of bonds or loans for capital improvements, must be paid off before the district can be disestablished.

Exemptions:

Consistent with Article XIII(d) of the state constitution, it has been determined that all parcels within the proposed district will derive special benefits from the district. Therefore, no parcels will be exempted from payment into the Laurel Property Business Improvement District, regardless of use or ownership. (see attached Engineer's Report).

8. PROPOSED RULES AND REGULATIONS TO BE APPLICABLE TO THE DISTRICT:

CITY BASELINE SERVICES AGREEMENT AND CONTINUATION OF CITY SERVICES

Throughout the process of establishing the new Laurel PBID, business and property owners have voiced concerns that the City of Oakland maintain existing services at verifiable "baseline" service levels. A formal base level of services policy ensures that existing City Services are enhanced, not replaced by the new PBID services.

Pursuant to the Business Improvement Maintenance District Ordinance of the City of Oakland, a Management District may establish rules and regulations that uniquely apply to the District. A few initial rules and regulations should be employed by the Laurel PBID Steering Committee in the administration of the district.

Competitive Bidding:

Following the formation of the Management District, the Management Corporation Board should consider developing a policy for competitive bidding as it pertains to contracted services for the Laurel PBID. The policy will aim to maximize service quality, efficiency and cost effectiveness.

Conflict of Interest:

Any stakeholder who serves on the Laurel PBID Management Corporation 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 Board members.

Open Door Policy:

Meetings of the Board of the corporation administering the district shall be open to all stakeholders paying into the district. Regular financial reports shall be submitted to the Board members and made available upon request by the membership. Sub-Committee meetings of the Management corporation shall be open and encourage participation among various stakeholders, business owners and community members. The Board shall retain the right to enter into executive session for reasons including, but not limited to strategic planning, legal matters, personnel issues, etc.

Group Advocacy:

It should be a policy of the Laurel PBID Management Corporation to be committed to working with other citywide Business Improvement Districts. The true success of the PBID's efforts in the City of Oakland will be seen in the shaping of City policies and ordinances towards its various business districts.

Policy Development:

The management corporation, once formed, will create a number of policies which will help the Board of Directors to effectively manage the district. 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.

9. ADVISORY BOARD AND MANAGEMENT OF THE DISTRICT:

The Laurel PBID Management Corporation is charged with the day-to-day operations of the Management District. The entity will include all property owners paying into the district and include representation from business owners and various sectors of the assessment district. The non-profit corporation should be set up as a public benefit corporation and file for application to the IRS once the district has been adopted by the City Council of Oakland.

MANAGEMENT CORPORATION AND THE ADVISORY BOARD:

The final management structure will include the Laurel PBID assessed property owners who will organize themselves into a new non-profit corporation whose Board will serve in the capacity of the contracted management corporation.

“The City Council may designate existing advisory boards or commissions to serve as the advisory board for the district or may create a new advisory board for that purpose. At least one member of the advisory board shall be a business licensee within the district who is not also a property owner within the district.....The advisory board shall cause to be prepared a report of each fiscal year for which assessments are to be levied and collected to pay the costs of the improvements and activities described in the report.” (Section 4.48.190)

Members of the proposed Advisory Board will be recommended by the new non-profit PBID Management Corporation Board of Directors. The Advisory Board will be distinct from the

Management Corporation and shall meet at least once per year to advise the City Council on any changes to the district.

A mix of large and small property owners will be sought to fill the non-profit corporation Board of Directors. The Board of Directors, shall make recommendations to the Advisory Board, who in turn shall adopt an annual service plan, including budgets and monitor the services delivery, as presented. The Advisory Board submits its report annually to the City Council on the anniversary of the district's renewal. The Management Corporation, shall aim to meet the following operational objectives for the Laurel PBID:

- *Create and manage programs that best respond to the top priorities of Laurel PBID stakeholders;*
- *Maximize coordination of the City government to avoid duplication of services and to leverage resources;*
- *Deliver services through a cost-effective, non-bureaucratic and easy to access organizational structure;*
- *Provide accountability and responsiveness to those who pay.*

10. ENGINEER'S REPORT

Property owners in the Laurel PBID have emphasized that an assessment formula for the PBID be fair, balanced and commensurate with special benefits received.

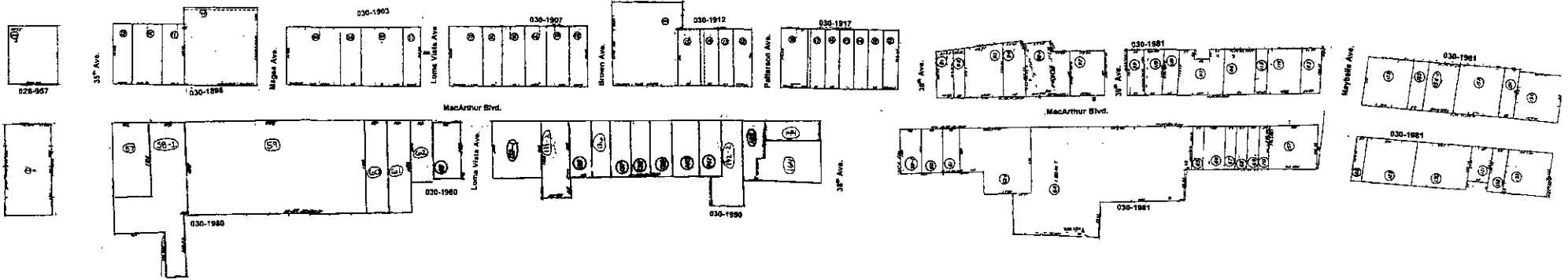
NEW CITY AMERICA has contracted with Ed Henning and Associates to compile the required engineer's report under the guidelines of Proposition 218, Article XIII D of the California State Constitution.

In preparing the engineer's report for the Laurel PBID Management District Plan, the engineer concluded that the special benefit to each parcel in the various benefit zones was found to be proportional to the property variable and their apportionment.

An Engineer's report for the PBID is provided in the Appendix.

14.1
ORA/COUNCIL
JUL 19 2005

MAP OF THE LAUREL
PROPERTY BUSINESS IMPROVEMENT DISTRICT
MAY 2005



Laurel District

NEW CITY

Marco Lj Mandri, President
 New City America, Inc.
 2130 Columbia Street
 San Diego, California 92101
 619/356-2726
 FEBRUARY 2008

10-YEAR PROJECTION OF ASSESSMENTS
AND FUNDING CATEGORIES
(WITH ADJUSTMENTS MADE ASSUMING A
MAXIMUM OF 5% ADJUSTMENT FOR COST OF
LIVING INCREASES)

2006 - 2015

Laurel District

PROPERTY BUSINESS IMPROVEMENT DISTRICT
TEN YEAR PROJECTION,
WITH 5% ANNUAL ADJUSTMENT

May 2005

Projected Budget	2005	5%	2006	5%	2007	5%	2008	5%	2009
Public Rights of Way & Sidewalk	\$95,000.00	\$4,750.00	\$99,750.00	\$4,987.50	\$104,737.50	\$5,236.88	\$109,974.38	\$5,498.72	\$115,473.09
District Identity & Streetscape Improvements	\$19,000.00	\$950.00	\$19,950.00	\$997.50	\$20,947.50	\$1,047.38	\$21,994.88	\$1,099.74	\$23,094.62
Administrative/Corporate Operations	\$35,000.00	\$1,750.00	\$36,750.00	\$1,837.50	\$38,587.50	\$1,929.38	\$40,516.88	\$2,025.84	\$42,542.72
Contingency/Reserve	\$8,607.00	\$430.35	\$9,037.35	\$451.87	\$9,489.22	\$474.46	\$9,963.68	\$498.18	\$10,461.86
Total	\$157,607.00	\$7,880.35	\$165,487.35	\$8,274.37	\$173,761.72	\$8,688.09	\$182,449.80	\$9,122.49	\$191,572.29

5%	2010	5%	2011	5%	2012	5%	2013	5%	2014
\$5,773.65	\$121,246.75	\$6,062.34	\$127,309.09	\$6,365.45	\$133,674.54	\$6,683.73	\$140,358.27	\$7,017.91	\$147,376.18
\$1,154.73	\$24,249.35	\$1,212.47	\$25,461.82	\$1,273.09	\$26,734.91	\$1,336.75	\$28,071.65	\$1,403.58	\$29,475.24
\$2,127.14	\$44,669.85	\$2,233.49	\$46,903.35	\$2,345.17	\$49,248.51	\$2,462.43	\$51,710.94	\$2,585.55	\$54,296.49
\$523.09	\$10,984.96	\$549.25	\$11,534.20	\$576.71	\$12,110.91	\$605.55	\$12,716.46	\$635.82	\$13,352.28
\$9,578.61	\$201,150.91	\$10,057.55	\$211,208.45	\$10,560.42	\$221,768.88	\$11,088.44	\$232,857.32	\$11,642.87	\$244,500.19

APPENDIX I

LIST OF PARCELS TO BE ASSESSED

LAUREL DISTRICT

5/12/2005

<u>APN</u>	<u>Annual Assessment</u>	<u>APN</u>	<u>Annual Assessment</u>	<u>APN</u>	<u>Annual Assessment</u>
028 0956 006 04	\$3,294.93	030 1980 132 01	\$2,634.72	030 1981 117 00	\$2,788.99
028 0957 011 03	\$2,187.75	030 1980 134 02	\$1,810.49	030 1981 118 00	\$981.18
030 1898 008 01	\$3,780.29	030 1980 135 00	\$1,016.43	030 1981 119 00	\$1,123.28
030 1898 011 00	\$826.17	030 1980 136 00	\$981.18	030 1981 128 00	\$1,149.35
030 1898 012 00	\$1,113.36	030 1980 137 00	\$1,227.74	030 1981 129 00	\$2,305.85
030 1898 013 00	\$1,503.65	030 1980 138 00	\$1,234.60	030 1981 130 00	\$2,761.48
030 1903 011 00	\$1,346.52	030 1980 139 00	\$1,320.06	030 1981 131 00	\$1,180.82
030 1903 012 01	\$1,889.24	030 1980 140 00	\$1,279.28	030 1981 132 00	\$849.05
030 1903 014 00	\$829.33	030 1980 141 00	\$1,320.06	030 1981 133 00	\$2,595.97
030 1903 015 01	\$2,560.95	030 1980 142 02	\$2,132.34	030 1981 135 00	\$3,274.48
030 1907 012 00	\$1,373.88	030 1980 144 00	\$1,573.74	030 1981 150 00	\$3,293.21
030 1907 013 00	\$751.89	030 1980 163 00	\$1,035.34	030 1981 151 00	\$1,128.17
030 1907 014 00	\$1,096.45	030 1980 164 00	\$1,330.06	030 1981 152 00	\$2,469.85
030 1907 015 00	\$973.61	030 1981 059 01	\$1,557.09	030 1981 154 01	\$1,658.10
030 1907 016 00	\$835.92	030 1981 060 00	\$1,245.27	030 1981 155 00	\$766.56
030 1907 017 00	\$2,094.11	030 1981 061 00	\$983.03	030 1981 157 00	\$3,414.29
030 1912 012 00	\$1,474.27	030 1981 063 01	\$4,250.53		
030 1912 013 00	\$700.84	030 1981 064 00	\$14,528.98		
030 1912 014 00	\$990.05	030 1981 065 00	\$704.34		
030 1912 015 00	\$1,082.33	030 1981 066 00	\$965.47		
030 1912 019 01	\$3,534.54	030 1981 067 00	\$701.50		
030 1917 012 00	\$1,481.48	030 1981 068 00	\$594.05		
030 1917 013 00	\$661.53	030 1981 069 00	\$482.67		
030 1917 014 00	\$859.16	030 1981 070 00	\$650.77		
030 1917 015 00	\$859.16	030 1981 091 00	\$1,664.53		
030 1917 016 00	\$608.39	030 1981 092 00	\$759.65		
030 1917 017 00	\$874.61	030 1981 093 00	\$2,779.12		
030 1917 018 00	\$1,899.17	030 1981 094 00	\$1,115.69		
030 1980 057 00	\$2,589.50	030 1981 097 00	\$2,727.98		
030 1980 058 01	\$1,937.55	030 1981 098 01	\$2,685.78		
030 1980 059 00	\$9,104.43	030 1981 099 00	\$1,713.90		
030 1980 060 00	\$1,186.97	030 1981 113 00	\$1,676.96		
030 1980 061 00	\$1,563.50	030 1981 114 00	\$1,931.03		
030 1980 062 00	\$902.77	030 1981 115 00	\$701.06		
030 1980 063 00	\$1,820.74	030 1981 116 00	\$1,962.35		

**The Laurel District
Property Business Improvement District**

CITY OF OAKLAND - CALIFORNIA

**DISTRICT
ASSESSMENT ENGINEER'S
REPORT**

*Prepared by
Edward V. Henning,
California Registered Professional Engineer # 26549
Edward Henning & Associates
Phelan California*

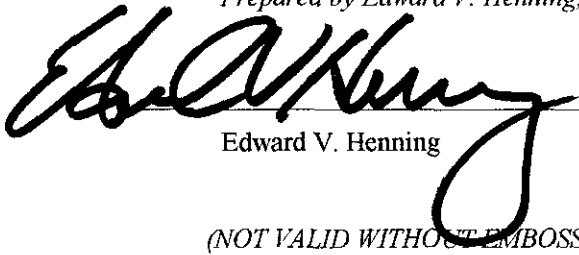
April 2005

DISTRICT ASSESSMENT ENGINEER'S REPORT

To Whom It May Concern:

I hereby certify to the best of my professional knowledge and experience that each of the identified benefiting properties located within the proposed Laurel District Property Business Improvement District will receive a special benefit over and above the benefits conferred on the public at large and that the amount of the proposed assessment is proportional to, and no greater than the benefits conferred on each respective property.

Prepared by Edward V. Henning, California Registered Professional Engineer # 26549



RPE #26549

April 21, 2005

Edward V. Henning

Date

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Introduction

This report shall serve as the “detailed engineer’s report” required by Section 4(b) of Article XIII D of the California Constitution (Proposition 218) to support the benefit property assessments proposed to be levied within the Laurel District Property Business Improvement District (Laurel District PBID) in the City of Oakland, California being re-established for a ten year period. The discussion and analysis contained within constitutes the required “nexus” of rationale between assessment amounts levied and special benefits derived by properties within the Laurel District PBID.

NOTE 1: The terminology “identified benefiting parcel” or “property” is used throughout this report pursuant to SB 919 - “Proposition 218 Omnibus Implementation Act” which clarified portions of Prop 218. It provides the Engineer and District Consultant with the ability to actually identify individual parcels which will benefit directly either in whole or in part from the proposed District funded programs and improvements and does not imply that all parcels receive assessable benefits .

Background

The Laurel District PBID is a property-based benefit assessment type district being established pursuant to the City of Oakland's *Business Improvement District Ordinance of 1999 #12190* (the "BID Ordinance") under Municipal Code Chapter 4.48 which was fashioned in part from Section 36600 et seq. of the California Streets and Highways Code, also known as the Property and Business Improvement District Law of 1994 (the "Act"). Due to the benefit assessment nature of assessments levied within a PBID, district program costs are to be distributed amongst all identified benefiting properties based on the proportional amount of program benefit each property is expected to derive from the assessments collected. Within the BID Ordinance and the Act, frequent references are made to the concept of relative "benefit" received from PBID programs and activities versus amount of assessment paid. Only those properties expected to derive special benefits from PBID funded programs and activities may be assessed and only in an amount proportional to the relative benefits expected to be received.

The method used to determine benefits derived by each identified property within a PBID begins with the selection of a suitable and tangible basic benefit unit. For property related services, such as those proposed in the Laurel District PBID, the benefit unit may be measured in linear feet of primary street frontage or parcel size in square feet or building size in square feet or number of building floors or proximity to major corridors in average linear feet, or any combination of these factors. Quantity takeoffs for each parcel are then measured or otherwise ascertained. From these figures, the amount of benefit units to be assigned to each property can be calculated. Special circumstances such as unique geography, land uses, development constraints etc. are carefully reviewed relative to specific programs and improvements to be funded by the PBID in order to determine any levels of diminished benefit which may apply on a parcel by parcel or categorical basis.

Based on the factors described above such as geography and nature of programs and activities proposed, an assessment formula is developed which is derived from a singular or composite basic benefit unit factor or factors. Within the assessment formula, different factors may be assigned different "weights" or percentage of values.

Next, all program and activity costs, including incidental costs, district administration, ancillary programs, and volunteer and comped resource and material credits are estimated. It is noted, as stipulated in Proposition 218, and now required of all property based assessment districts, indirect and general benefits may not be incorporated into the assessment formula and levied on the district properties; only direct or "special" benefits and costs may be considered. Indirect or general benefit costs must be calculated and factored out of the assessment cost basis to produce a "net" cost figure. In addition, Proposition 218 no longer exempts government owned property from paying benefit assessments and these properties must be factored into the assessment roll if special benefit is determined to be conferred upon such properties.

From this, the value of a basic benefit unit or “basic net unit cost” can be computed by dividing the total amount of estimated net program costs by the total number of benefit units. The amount of assessment for each parcel can be computed at this time by multiplying the Net Unit Cost times the number of Basic Benefit Units per parcel. This is known as “spreading the assessment” or the “assessment spread” in that all costs are allocated proportionally or “spread” amongst all properties within the PBID.

The method and basis of spreading program costs varies from one PBID to another based on local geographic conditions, types of programs and activities proposed, and size and development complexity of the district. PBIDs may require secondary benefit zones to be identified to allow for a tiered assessment formula for variable or “stepped-down” benefits derived.

Supplemental Proposition 218 Procedures and Requirements

Proposition 218, approved by the voters of California in November of 1996, adds a supplemental array of procedures and requirements to be carried out prior to levying a property-based assessment like the Laurel District PBID. These requirements are in addition to requirements imposed by State and local assessment enabling laws. These requirements were “chaptered” into law as Article XIII D of the California Constitution and then further clarified by the Proposition 218 Omnibus Legislation in 1997 chaptered in section 53750 et seq of the California Government Code.

Since Prop 218 provisions will affect all subsequent calculations to be made in laying out the final property assessment roll for the Laurel District PBID, Prop 218 requirements will be taken into account first. The key provisions of Prop 218 along with a description of how the Laurel District PBID complies with each of these provisions is delineated below.

(Note: All section references below pertain to Article XIII of the California Constitution):

Finding 1. From Section 4(a): “Identify all parcels which will have a special benefit conferred upon them and upon which an assessment will be imposed”

There are 86 “identified” individual parcels within the Laurel District PBID which will all derive some level of special benefit from the proposed District programs and activities. These parcels are shown on the Boundary Map within the Management District Plan and are listed as an attachment to the Plan - identified by assessor parcel number and site address. One benefit zone has been identified within the District which includes all properties along MacArthur Blvd. from 35th to High St.

Finding 2. From Section 4(a): “Separate the general benefits from the special benefits conferred on parcel(s). Only special benefits are assessable. “

As stipulated by Prop 218, assessment district programs and activities confer a combination of general and special benefits to district properties, but the only program benefits which can be funded through assessments are those attributed to special property related benefits. Thus, a portion of the program costs must be considered attributable to general benefits and assigned a value. Conventional assessment engineering experience has found that general benefits within a given district typically average 5% of the total adjusted costs. (Total adjusted costs include actual proposed PBID program costs plus any additional supplemental or matching program costs as well as applied credits from sources such as start up grants, Board/Committee member service credits and specialized assessment reductions/adjustments.) There are three common methods for determining general and special benefit ratios within assessment districts:

- (1) The parcel by parcel allocation method
- (2) The program/activity line item allocation method, and
- (3) The composite district overlay determinant method.

The vast majority of PBIDs in California have used Method #3, the composite district overlay determinant method which will be used for the Laurel District PBID. Using empirical data from other PBIDs, a focused range for general benefits from 2-8% is used. Based on a composite of district criteria such as the shape of the Laurel District PBID, the existence of one benefit zone, a three-four element assessment formula, the proximity all of district properties to the applicable program benefit zones, and the nature of the proposed programs and activities, a specific “overlay” value of 3% is assigned to the general benefit portion of the total adjusted costs. This leaves a value of 97% assigned to special benefit related costs. Since the total program cost is estimated at \$175,107 (see Table 1 later in this Report), the maximum special benefit portion which can be recouped through property assessments, is \$169,854. Remaining costs which are attributed to general benefits, will need to be derived from other sources. (e.g. public/private matching grants, startup grants, startup volunteer credits or ongoing board member volunteer credits).

Finding 3. From Section 4(a): “(Determine) the proportionate special benefit derived by each parcel in relationship to the entirety of the.....cost of public improvement(s) or the maintenance and operation expenses.....or the cost of the property related service being provided.

The proportionate special benefit cost for each parcel is listed in an attachment to the Management District Plan. The individual percentages (i.e. proportionate relationship to the total special benefit related program and activity costs) were computed by dividing the individual parcel assessment by the total program costs.

Finding 4. From Section 4(a): “No assessment..... shall exceed the reasonable cost of the proportional special benefit conferred on parcel(s).”

Not only are the proposed program costs reasonable due to the benefit of group purchasing and contracting which would be possible through the Laurel District PBID, they are also considerably less than other options considered by groups like the Laurel District PBID Renewal Committee.

Finding 5. From Section 4(a): “Parcels.....that are owned or used by any (public) agency shall not be exempt from assessment.”

Any parcels within the District that are owned by public agencies would also be assessed and at rates equivalent to private sector owned parcels. The “fair market value” of such public properties is identical to surrounding privately owned parcels and any increased values and benefits derived from PBID programs and services would be similar for either public or privately owned parcels, with or without improvements. Just as the costs and effects of blight are shared by both public and private properties, so are the rewards of clean and safe as well as district promotions and marketing programs. Since there is no compelling finding or evidence that such properties would receive less direct benefit from the proposed PBID programs and services than surrounding private parcels, the same assessment rates would be levied.

Finding 6. From Section 4(b): “All assessments must be supported by a detailed engineer’s report prepared by a registered professional engineer certified by the State of California”.

This report shall serve as the “detailed engineer’s report” to support the benefit property assessments proposed to be levied within the Laurel District PBID.

Finding 7. From Section 4(c): “The amount of the proposed assessment for each parcel shall be calculated (along with) the total amount thereof chargeable to the entire district, the duration of such payments, the reason for such assessment and the basis upon which the amount of the proposed assessment was calculated.”

The individual and total parcel assessments attributable to special property benefits are shown on an attachment to the Management District Plan. The district and resultant assessment payments will continue for ten years and may be renewed again at that time. The reasons (purposes) for the proposed assessments are outlined in the Management District Plan. The calculation basis of the proposed assessment for the PBID is attributed in part to the specific amount of property size, building size and street frontage and land use .

Special Benefit and Assessment Analysis

Step 1. Select “Basic Benefit Unit(s)”

PBID assessment formulas typically are based on either property street frontage or parcel and building size or location, all which can affect the amount of benefit conferred on a particular parcel and the proportionate assessment to be paid. The formula may base assessments on a single factor or a combination of factors.

Based on the nature of the program activities to be funded by the Laurel District PBID, which relate to the proportionate amount of land area, building area property street frontage and land use, it has been determined that the assessments for the PBID will be based proportionately on a combination of parcel size, building size and street frontage with further modifications based on land use.

The “Basic Benefit Unit” will be expressed as a function of land square footage (Basic Benefit “A” Units), building area (Basic Benefit “B” Units) and linear feet of property frontage (Basic Benefit “C” Units). Based on the shape of the Laurel District PBID, as well as the nature of the District program elements, it is determined that three benefit zones exist in which identified properties will gain a direct, albeit, proportionate degree of benefit based on the respective amount of parcel size, building size and primary street street frontage. The targeted revenue is to be weighted 53% on land area, 17% on building area and 30% on street frontage.

It is noted that Benefit B Units shall be further differentiated as follows: Retail, hotels/motels = “B-A”; Office/Commercial = “B-B”; Industrial/manufacturing = “B-C”; Institutional = “B-D”; Church/non-profit = “B-E”; Multi-unit housing = “B-F”; SFR =”B-G”; Condos = “B-H”; Non-functional structures/parking garages = “B-I”.

The program costs are apportioned as follows: A. Maintenance Services 50% on Lot Size and 50% on Street Frontage; B. Identity based on building size for retail uses only; C. Administration 50% on building size and 50% on lot size; D. Contingency/Reserve 100% on lot size.

Step 2. Quantify Total Basic Benefit Units

Taking into account all identified benefiting properties, there are 624,719 square feet of assessable parcel land area within the District, 346,619 square feet of assessable building area and 8,016 linear feet of assessable property street frontage. Since the selected Basic Benefit Unit is based on a combination of parcel area, building area and street frontage, there are, in turn, corresponding amounts of Basic Benefit Units in the PBID as shown in Step 7 herein.

Step 3. Calculate Benefit Units for Each Property.

The number of Benefit Units for each identified benefiting parcel within the Laurel District PBID was computed from data extracted from City of Oakland, Alameda County and third party real estate data services property and land use records. These data sources delineate current land uses, property areas and dimensions of record for each tax parcel and are listed as an attachment to the Management District Plan. While it is understood that this data does not represent legal field survey measurements or detailed title search of recorded land subdivision maps or building records, it does provide an acceptable basis for the purpose of calculating property based assessments. All respective property data being used for assessment computations has been provided to each property owner in the PBID for their review. All known or reported discrepancies or errors have been corrected.

Step 4. Determine Assessment Formula

For a District with a single Basic Benefit Unit with one Benefit Zone, the assessment formula would be the same for each identified benefiting property as follows:

$$\text{Number of Basic Benefit Units} \times \text{Basic Unit Cost} = \text{PBID Assessment}$$

The Laurel District PBID assessment is to be based on three Basic Benefit Unit factors; land square footage (Basic Benefit "A" Units), building area (Basic Benefit "B" Units) and linear feet of property frontage (Basic Benefit "C" Units). It has been determined that the assessment should be based partially on parcel size, building size and street frontage as follows:

$$\begin{aligned} \text{Assessment} = & \{(\text{No. of Benefit "A" Units} \times \text{Basic "A" Unit Cost})\} + \\ & \{(\text{No. of Benefit "B" Units} \times \text{Basic "B" Unit Cost})\} + \\ & \{(\text{No. of Benefit "C" Units} \times \text{Basic "C" Unit Cost})\} \end{aligned}$$

Step 5. Estimate Total Program and Activity Costs

Total estimated proposed program and activity costs are shown below in Table I. These costs include expenses for

general as well as special benefits and related programs/activities.

TABLE 1

Estimated Total Year 1 Program & Activity Costs (Special+General Benefits)

Program/Activity	Year 1	%
Public Rights of Way & Sidewalk Operations	\$95,000.00	54%
District Identity/Streetscape Improvements	\$19,000.00	11%
Administration/Corporate Operations	\$35,000.00	20%
Contingency/Reserve	\$8,607.00	5%
Misc Costs (Credits)	\$17,500.00	10%
Total	\$175,107.00	100.00%

Step 6. Separate General Benefits from Special Benefits and Related Costs (Prop 218)

Total program and activity costs are estimated at \$175,107 (see Table 1 above). General benefits are factored at 3% of total (see Finding 2 on page 5 of this report) with special benefits set at 97%. Prop 218 limits the levy of property assessments to costs attributed to special benefits only. The 3% general benefit cost is computed to be \$5,253 with a resultant 97% special benefit limit computed at \$169,854. *This is the maximum amount of revenue that can be derived from property assessments from the subject PBID.* The total amount of revenue proposed to be derived from PBID assessments is \$157,607 for Year 1, which is less than the special benefit limit of \$169,854. Therefore, no Prop 218 adjustments need to be made to the proposed assessment formula. All program costs associated with general benefits will be derived from sources or credits other than PBID assessments as shown below in Table 2.

TABLE 2**Total Adjusted Year 1 Revenue (For Special + General Benefit Programs/Activities)**

Funding Source	Subtotal Revenue	% of Total
PBID Assessments	\$157,607.00	90.0%
PBID Formation Pro-rated Credit/Year (\$35,000 base)	\$3,500.00	2.0%
PBID Formation Pro-Rated Volunteer Credit/Year (50% base)	\$1,750.00	1.0%
Annual Board/Volunteer Credit (35% base Admin)	\$12,250.00	7.0%
TOTAL ADJUSTED REVENUE	\$175,107.00	100.0%

Step 7. Calculate “Basic Unit Cost” (Special Benefits Only)

With a Year 1 budget of \$157,607 (special benefit only), the Basic Unit Costs (“A”, “B” and “C”) would be:

Basic Unit “A” Cost = \$0.13365/unit

Basic Unit “B-A” Cost = \$08743/unit

Basic Unit “B-B” through “B-G Cost = \$0.04968/unit (with “B-G” not to exceed \$240/year)

Basic Unit “B-H” Cost = \$240/unit

Basic Unit “B-I” Cost = \$0.00/unit

Basic Unit “C” Cost = \$5.9256/unit

Note: Benefit “B” Unit Costs are only applied to retail, office and industrial land uses. Other uses are exempt.

Since the PBID is planned for a ten year term, maximum assessments for future years (Years 2 through 10) must be set at the inception of the PBID. A maximum annual flat rate increase of 5% may be imposed each year, subject to approval by the PBID Board.

Step 8. Spread the Assessments

The resultant assessment spread calculations for each parcel within the PBID are shown in an attachment to the District Management Plan and were determined by applying the District assessment formula to each identified benefiting property. This list of all identified benefiting parcels in the PBID delineates each parcel and benefit units for property street frontage and parcel area.

EDWARD HENNING & ASSOCIATES

Edward Henning and Associates is a multi-disciplined consulting firm offering a diverse range of community development and funding services focusing on downtown business districts and the unique problems and opportunities associated with center city areas.

Types of services provided

- Business Improvement District (BID & PBID) Formations, Modifications, Expansions, Updates
- Prop 218 Assessment Engineering Analyses and Reports (Licensed Engineer)
- Downtown Revitalization Plans/Redevelopment Planning and Implementation
- Establish/Administer/Field Supervision for Rehabilitation Programs and Projects
- Architectural Design Guidelines/ Sign Ordinances

Partial list of agencies and clients represented

- | | |
|--|--|
| • Town of Apple Valley | PBID Formation (Village) |
| • City of Berkeley | BID Formation (Downtown) |
| • City of Buena Park | BID Formation Analysis (Auto Row & Entertainment Corridor) |
| • City of Culver City | BID Formation (Downtown) |
| • City of Huntington Park | BID Formation (Pacific Blvd.) |
| • City of Huntington Beach | BID Formation (Auto Row District) |
| • City of Los Angeles | |
| - Gateway to LAX | PBID Formation & Renewal (Prop 218 Compliance) |
| - Historic Downtown Core | PBID Formation (Prop 218 Compliance) |
| - Hollywood District | PBID Formation (Prop 218 Compliance) |
| - Melrose/Fairfax | PBID Formation (Prop 218 Compliance) |
| - Larchmont | PBID Formation & Renewal |
| - Los Feliz | BID Formation |
| - San Fernando Valley (6 areas) | PBID Formation (Prop 218 Compliance) |
| - San Vicente | Private Sector PBID Formation |
| - Wilshire Center | Hybrid BID/PBID Formation |
| • City of Monterey Park | BID Modification (Downtown) |
| • City of Napa | PBID Formation (Downtown) |
| • City of Newport Beach | BID Advising |
| • City of Ontario (Downtown) | BID Modification |
| • City of Oxnard | PBID Formation (Downtown) |
| • City of Pasadena | PBID Formation (Playhouse District) |
| | Citywide Tourist Improvement District (TID) |
| • Placer County (Tahoe City) | PBID Formation (Downtown) |
| • City of San Francisco (Union Square) | PBID Formation (Prop 218 Compliance) |
| • City of Vacaville | BID Formation (Downtown) |
| | Citywide Tourist Improvement District Evaluation (TID) |
| • City of Whittier | BID Modification (Uptown) |
| • City of Yucaipa | PBID Formation & Renewal(Uptown) |

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