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**REDEVELOPMENT AGENCY  
AND THE CITY OF OAKLAND  
AGENDA REPORT**

**TO:** Office of the City/Agency Administrator  
**ATTN:** P. Lamont Ewell, Interim City/Agency Administrator  
**FROM:** Community and Economic Development Agency  
**DATE:** July 12, 2011

**RE:** Resolution Approving The Annual Reports Of The Lakeshore/Lake Park Business Improvement Management District, The Temescal/Telegraph Avenue Property Business Improvement District Of 2005, The Laurel Property Business Improvement District Of 2005, The Fruitvale Property Business Improvement District of 2006, the Koreatown/Northgate Community Benefit District of 2007, the Downtown Oakland Community Benefit District of 2008, and the Lake Merritt/Uptown Community Benefit District of 2008 Advisory Boards; Confirming The Continuing Annual Assessment For Each Applicable District For Fiscal Year 2011/12; and Authorizing Payment of the City's Cumulative Fiscal Year 2011/12 Fair Share Assessment in an Amount Not to Exceed \$148,165.47 for City-Owned Properties in the Temescal/Telegraph Avenue District, Koreatown/Northgate District, the Downtown Oakland District, and the Lake Merritt/Uptown District.

An Agency Resolution Authorizing Payment Of the Redevelopment Agency's Cumulative Fiscal Year 2011/12 Fair Share Assessment in an Amount Not to Exceed \$33,860.56 for Agency-Owned Properties in the Koreatown/Northgate Community Benefit District Of 2007, The Downtown Oakland Community Benefit District Of 2008, And The Lake Merritt/Uptown Community Benefit District Of 2008.

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**SUMMARY**

Pursuant to the City of Oakland's Business Improvement Management District (BIMD) Ordinance (Ordinance No. 12190 C.M.S., 1999) and the Neighborhood Business Improvement District (NBID) Program (Resolution No. 75323 C.M.S., 1999) a resolution has been prepared which approves the annual reports from the advisory boards to the Lakeshore/Lake Park Business Improvement Management District, the Temescal/Telegraph Avenue Property Business Improvement District (PBID) of 2005, the Laurel Property Business Improvement District of 2005, the Fruitvale Property Business Improvement District of 2006, the Koreatown/Northgate Community Benefit District (CBD) of 2007, the Downtown Oakland Community Benefit District of 2008, and the Lake Merritt/Uptown Community Benefit District of 2008. This resolution also confirms the continuing annual assessment for each applicable district for fiscal year 2011/12, and authorizes payment of the assessments attributable to the City-owned

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properties in the Temescal/Telegraph Avenue District, Koreatown/Northgate District, the Downtown Oakland District, and the Lake Merritt/Uptown District. A second resolution has also been prepared which authorizes payment of the related assessment on parcels owned by the Oakland Redevelopment Agency located within the Koreatown/Northgate, the Downtown Oakland, and the Lake Merritt/Uptown CBDs. Adoption of the attached resolutions is necessary to support ongoing services within the above-referenced special assessment districts.

### FISCAL IMPACTS

Pursuant to State Proposition 218, the City and Redevelopment Agency must pay their fair share of assessments on City and Agency owned property within the above-referenced special assessment districts. This is because public as well as private properties derive special benefits from the activities of the districts.

Citywide there are eleven (11) City properties and six (6) Redevelopment agency properties on which assessments will be due as follows:

District	APN	Legal Owner	Site Description	Annual Assessment
Temescal/ Telegraph Avenue	014 1219 003 00	City of Oakland	Temescal Library at 5205 Telegraph Avenue	\$ 2,112.41
Koreatown/ Northgate	008 0648 016 03	City of Oakland	A parking lot at 2100 Telegraph Avenue	\$ 9,500.00
Downtown Oakland	003 0065 009 02	City Of Oakland	551 16th Street (250 Frank Ogawa Plaza Building area)	\$ 24,667.20
Downtown Oakland	003 0067 001 00	City Of Oakland/	1 Frank H Ogawa Plz. (City Hall)	\$ 28,719.48
Downtown Oakland	003 0067 002 00	City Of Oakland	1414 Clay Street (Clay Street Garage)	\$ 10,891.20
Downtown Oakland	008 0619 008 01	City Of Oakland	150 Frank H Ogawa Plz (L. Wilson Building)	\$ 27,296.71

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District	APN	Legal Owner	Site Description	Annual Assessment
LakeMerritt/ Uptown	088 0623 006 01	City of Oakland	1731 Franklin St. (Franklin St. Garage)	\$ 6,963.48
Lake Merritt/ Uptown	008 0655 006 00	City of Oakland	Grand Avenue	\$ 2,040.60
Lake Merritt/ Uptown	010 0768 004 00	City of Oakland	200 Grand Avenue (Veteran's Memorial Bldg.)	\$ 8,206.46
Lake Merritt/ Uptown	008 0649 005 00	City of Oakland	2025 Broadway (Paramount Theatre)	\$ 4,444.88
Lake Merritt/ Uptown	008 0635 001 00	City of Oakland	274 19 <sup>th</sup> Street (Snow Park)	\$ 23,323.05
			<b>TOTAL CITY</b>	<b>\$148,165.47</b>
Downtown Oakland.	001 0201 010 00	Redevelopment Agency	822 Washington Street (Parking Lot)	\$ 2,696.86
Downtown Oakland	002 0097 045 00	Redevelopment Agency	12th Street (John B. Williams Plz.)	\$ 4,076.94
Downtown Oakland	008 0620 009 03	Redevelopment Agency	524 16 <sup>th</sup> Street (Parking Lot)	\$ 2,149.54
Downtown Oakland	008 0641 008 05	Redevelopment Agency	540 17 <sup>th</sup> Street (Oakland Ice Rink)	\$ 21,515.06
Lake Merritt/ Uptown	008 0649 09 00	Redevelopment Agency	490 20 <sup>th</sup> Street	\$ 1,386.66
Koreatown/ Northgate	008 0649 010 00	Redevelopment Agency	2016 Telegraph Ave.	\$ 2,035.50
			<b>TOTAL ORA</b>	<b>\$ 33,860.56</b>
			<b>GRAND TOTAL</b>	<b>\$182,026.03</b>

Funds to pay assessments on City-owned properties are contained in the Proposed FY 2011/13 as follows:

- \$8,165.47 budgeted to General Purpose Fund (1010)/Business Development Organization (88559)/Taxes and Assessments Account (53511)/ Business Improvement District Project (C138410)

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- \$140,000 budgeted to General Purpose Fund (1010)/Citywide Activities Organization (90591)/Taxes and Assessments Account (53511)/Undetermined Project (0000000).

Funds to pay assessments on Redevelopment Agency-owned properties are included in the proposed FY 2011/13 budget as follows:

- \$33,860.56 budgeted in the Oakland Redevelopment Agency Projects Fund (7780)/CIP Organization (94800)/Economic Development Taxes and Assessments Account (53511)/Business Improvement District Project (P300610) with a mirror Redevelopment Agency coding block of Oakland Redevelopment Agency Unrestricted Land Sales Projects Fund (9553)/CIP Organization (94800)/Taxes and Assessments Account (53511)/Business Improvement District Project (P125110).

Other than the above assessments, there is no fiscal impact anticipated with the passage of the attached resolutions. The related business improvement districts will pay their own operating and administrative costs, including costs for assessment collections and disbursements.

The County of Alameda will add the assessment as a line item to the annual property tax bill of each affected property owner and remit the amount collected less the County's collection fee (approximately 1.7% of total assessment) to the City. The City, in turn, will disburse the funds to the districts, pursuant to written agreements between the City and the districts' non-profit management corporations, less the City's costs of related administration and processing of the disbursements.

Until disbursed, BID assessments will be held in a special trust fund established by the City's Finance and Management Agency. The trust fund number is: Miscellaneous Trusts Fund (7999)/Treasury Operations Unit Organization (08721)/Pass Thru Assessments Account (24224)/Undetermined Project (0000000).

## BACKGROUND

The concerned business improvement districts, also known as community benefit districts, (BIDs/CBDs) were established as follows:

- The Lakeshore/Lake Park Business Improvement Management District on July 16, 2002, pursuant to Resolution No. 77280 C.M.S.
- The Temescal/Telegraph Avenue Property Business Improvement District of 2005 on July 20, 2004 pursuant to Resolution No. 78730 C.M.S.
- The Laurel Property Business Improvement District of 2005 on July 19, 2005 pursuant to Resolution No. 79380 C.M.S.
- The Fruitvale Property Business Improvement District of 2006 on July 18, 2006 pursuant to Resolution No. 80059 C.M.S.
- The Koreatown/Northgate Community Benefit District of 2007 on July 17, 2007 pursuant to Resolution No. 80788 C.M.S.

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- The Downtown Oakland Community Benefit District of 2008 on July 15, 2008 pursuant to Resolution No. 81479 C.M.S,
- The Lake Merritt/Uptown Community Benefit District of 2008 on July 15, 2008 pursuant to Resolution No. 81478 C.M.S.

The PBID model for economic development has been successfully used in other commercial neighborhoods throughout the country and throughout Oakland, including in the Montclair (established 2001), and Rockridge (established 2000) business development districts.

### KEY ISSUES AND IMPACTS

There is no anticipated adverse impact associated with the approval of the proposed resolutions. Adoption of the attached resolutions will enable the affected neighborhood commercial districts to continue providing enhanced services such as security, maintenance, marketing and promotional activities. These services are intended to improve the conditions and image of the affected business improvement districts and to stimulate ongoing economic revitalization.

### PROGRAM DESCRIPTION

By law service goals for each citywide BID/CBD are drafted by district stakeholders pursuant to input received by assesses during the initial formation of each district. Such written goals are contained within each district's respective Management Plan on file in the Office of the City Clerk. Each year a district is in existence, advisory boards for each BID/CBD are required to submit annual reports to the City summarizing the district's performance during the prior year and proposing improvements and activities for the upcoming year. Therefore, the attached annual reports (*Exhibit A*) present detailed performance reports from each district to the City.

Highlights of district activities include, but are not limited to, sidewalk sweeping and steam cleaning, litter pick-up, hiring of private security patrols and hospitality ambassadors, district marketing and advertising (including branding through logo and banner design development), creation and maintenance of district websites, development and distribution of business directories, public right of way landscaping and graffiti abatement, development and installation of public art projects, and coordination of special events such as the Lakeshore Easter Parade, the Taste of Temescal Restaurant Walk, the Laurel Street Fair and Lunar New Year celebration, the Fruitvale Las Posadas Parade and Dia de Los Muertos Festival and the Koreatown Culture Fest.

A brief profile of each reporting district is as follows:

The Lakeshore/Lake Park Business Improvement Management District encompasses approximately 47 parcels and projects an annual budget of approximately \$153,321.23 of which \$142,788.48 represents projected assessments to be collected for FY 2011/12. The district includes parcels along 5 blocks of Lakeshore and Lake Park Avenues as well as portions of nearby Rand Avenue and Wesley Way. Assessments are based on lot size and linear frontage of affected properties.

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The Temescal/Telegraph Avenue Property Business Improvement District encompasses approximately 260 parcels and projects an annual budget of approximately \$250,614 of which \$245,700 represents projected assessments to be collected for FY 2011/12. Additionally, the district has a prior year reserve of \$231,061 for which it has budgeted expenditures according to a 2005 Telegraph Avenue Streetscape Improvement Plan. The district includes all parcels along Telegraph from 40<sup>th</sup> Street to the Berkeley border, Shattuck Avenue to the Highway 24 overpass, Claremont one block up from Telegraph, and 51<sup>st</sup> Street up to and including Children's Hospital to one block east of Telegraph Avenue. Assessments are based on lot size, building size and linear frontage of affected properties.

The Laurel Property Business Improvement District of 2005 encompasses approximately 86 parcels and projects an annual budget of approximately \$278,707 of which \$169,597 represents projected assessments to be collected for FY 2011/12. The district includes parcels located primarily along MacArthur Boulevard from 35<sup>th</sup> Avenue to High Street. Assessments are based on lot size, building size, linear frontage and use of properties located within the district.

The Fruitvale Property Business Improvement District of 2006 encompasses approximately 300 parcels and projects an annual budget of approximately \$301,983 of which the total amount represents projected assessments to be collected for FY 2011/12. The district includes all parcels along Fruitvale Avenue from E. 12<sup>th</sup> Street to Foothill Boulevard, on Foothill Boulevard from Fruitvale Avenue to High Street, on International Boulevard from 29<sup>th</sup> to 42<sup>nd</sup> Avenue and on E. 12<sup>th</sup> Street from 33<sup>rd</sup> to 35<sup>th</sup> Avenue. Assessments are based on lot size and according to the level of service received.

The Koreatown/Northgate Community Benefit District of 2007 encompasses approximately 167 parcels and projects an annual budget of \$278,460 representing projected assessments to be collected for FY 2011/12. The district includes all parcels along Telegraph Avenue from 20<sup>th</sup> Street to 35<sup>th</sup> Street. Assessments are based on a combination of lot size, building size, linear frontage, and building use.

The Downtown Oakland Community Benefit District of 2008 encompasses approximately 114 parcels and projects an annual budget of approximately \$934,411 of which the total amount represents projected assessments to be collected for FY 2011/12. The district includes:

Northern Boundary: All parcels on both sides of 17<sup>th</sup> Street starting at the eastern side of the intersection of 17<sup>th</sup> Street and San Pablo Avenue and running eastward to the western side of the intersection of 17<sup>th</sup> Street and Franklin;

Southern Boundary: The parcels on the north side of 8<sup>th</sup> Street between the eastern side of the intersection of 8<sup>th</sup> Street and Washington Street running eastward to the western side of the intersection of Broadway and 8<sup>th</sup> Street. Then moving up one block north and beginning at the northeastern corner of the intersection of Broadway and 9<sup>th</sup> Street, running eastward along the north side of 9<sup>th</sup> Street to the end of the Marriot Courtyard parcel.

Western Boundary: All of the parcels on the eastern side of the intersection of San Pablo Avenue, 17<sup>th</sup> Street, and Clay Street, running southward along the east side of Clay Street to the

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City parking garage at the northeastern parcel of the intersection of 14<sup>th</sup> Street and Clay Street. The western boundary then runs along the western side of the parcels fronting along the west side of Broadway at the intersection of 14<sup>th</sup> Street and Broadway, running southward to the parcel at the northwestern corner of the intersection of Broadway and 11<sup>th</sup> Street;

*Eastern Boundary:* All of the parcels beginning at the southwest corner parcel of the intersection of 11<sup>th</sup> Street and Franklin Street, running northward along the west side of Franklin Street to both corner parcels at the western side of the intersection of Franklin Street and 17<sup>th</sup> Street.

Assessments are based on a combination of lot size, building size, linear frontage, and building use.

The Lake Merritt/Uptown Community Benefit District of 2008 encompasses approximately 257 parcels and projects an annual budget of approximately \$1,107,999 of which the total amount represents projected assessment to be collected for FY 2011/12. The district includes:

*Northern Boundary:* All parcels on both sides of 24<sup>th</sup> Street, one parcel east of Telegraph Avenue (in which the parcels at 24<sup>th</sup> and Telegraph are part of the Koreatown/Northgate CBD), running eastward to the southern side of the intersection of Harrison/24<sup>th</sup> Street and 27<sup>th</sup> Street, extending to the north to include the Whole Foods site at Vernon Street and Harrison Street;

*Southern Boundary:* The parcels on the north side of 17<sup>th</sup> Street from the intersection of Telegraph Avenue and 17<sup>th</sup> Street (excluding the parcels fronting along the north side of 17<sup>th</sup> Street between Telegraph and Franklin which are in the Downtown Oakland CBD, but including the parcels directly north of those excluded parcels). Continuing eastward including the four corners of the intersection of Webster and 17<sup>th</sup> Streets including parcels on both sides of 17<sup>th</sup> Street up to the western side of the intersection of Jackson and 17<sup>th</sup> Streets.

*Western Boundary:* All of the parcels on the eastern side of Telegraph Avenue from 17<sup>th</sup> Street (excluding the corner parcel at 17<sup>th</sup> Street and Telegraph) running northward to the southeastern parcel of the intersection of 20<sup>th</sup> and Telegraph, (the Sears site). The western boundary continues northward along the east side of Telegraph Avenue from 20<sup>th</sup> Street to the intersection of 24<sup>th</sup> Street and Telegraph Avenue (however, the parcels that front along Telegraph Avenue on both sides of the street from 20<sup>th</sup> Street to 24<sup>th</sup> Street are included in the Koreatown/North Gate CBD).

*Eastern Boundary:* All of the parcels beginning at the western side of the intersection of 17<sup>th</sup> and Jackson Street, running northward along the west side of Lake Merritt to West Grand Avenue. Then the boundary runs eastward to include the Veterans Memorial Park and the entire block bounded by West Grand Avenue, 27<sup>th</sup> Street and Harrison Street, ending at the Whole Foods site at Vernon and Harrison.

Assessments are based on a combination of lot size, building size, linear frontage, and building use.

Properties within the above districts are a mix of office, retail, entertainment, government, hotel, residential and parking uses and by law are assessed in proportion to the anticipated benefit received by each property. Planned services for the upcoming year are outlined in the annual reports filed by the district advisory boards and include, but are not limited to, sidewalk sweeping and steam cleaning, landscaping, graffiti removal, creation of district websites, and promotion of special events.

### **SUSTAINABLE OPPORTUNITIES**

**Economic:** The on-going levies 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 affected neighborhood commercial districts.

**Environmental:** The on-going levies will enable the affected business improvement districts to continue their efforts to strengthen and beautify the physical image of their existing neighborhood commercial areas through the use of enhanced sidewalk and street cleaning and maintenance.

**Social Equity:** BIDs incorporate all 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 merchant and property owner self-empowerment.

### **DISABILITY AND SENIOR ACCESS**

Passage of the proposed resolutions has no direct implications for disability and senior access.

### **RECOMMENDATIONS AND RATIONALE**

Adoption of the attached resolutions will support the continuance of the above-referenced BIDs and their planned activities. Revenues generated will be applied to a variety of local improvements and services beyond those already provided by existing municipal services. Examples include enhanced maintenance services, security, marketing and promotions. Such business improvement districts represent a proactive effort on the part of neighborhood business and property owners to improve the conditions and image of their area and to assist in the economic revitalization and physical maintenance of their respective commercial corridors.

Additionally, because BIDs are self-initiated, self-funded, and self-administered entities, there are no anticipated fiscal impacts for the City associated with continuance of the above-referenced BIDs, other than the fair share payment of \$182,026.03 for assessments on City and Agency owned property located within the concerned districts. Given the approximate \$2 million of private funds that will be leveraged, the above expenditure may be considered a reasonable and productive expenditure of public funds.

Consequently, BIDs/CBDs should be viewed as positive self-help models for other neighborhood commercial areas. Accordingly, staff recommends that the City Council adopt the resolution approving the annual reports and confirming the continuing FY 2011/12 annual assessments for

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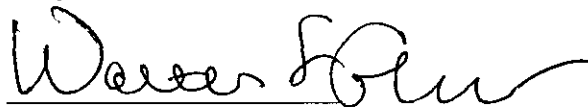


the above-referenced BIDs/CBDs, and the resolution to authorize payment of the assessment on six (6) Agency-owned properties located in the Koreatown/Northgate, Downtown Oakland and Lake Merritt/Uptown CBDs.

**ACTION REQUESTED OF THE CITY COUNCIL**

The action requested of the City Council is to: 1) adopt the resolution approving the annual reports of the Lakeshore/Lake Park Business Improvement Management District, the Temescal/Telegraph Avenue Property Business Improvement District of 2005, the Laurel Property Business Improvement District of 2005, the Fruitvale Property Business Improvement District of 2006, the Koreatown/Northgate Community Benefit District of 2007, the Downtown Oakland Community Benefit District of 2008, and the Lake Merritt/Uptown Community Benefit District of 2008 advisory boards; confirming the continuing annual assessment for each applicable district for fiscal year 2011/12, and authorizing payment of the assessments attributable to the City-owned properties in the Temescal/Telegraph Avenue District, Koreatown/Northgate District, the Downtown Oakland District, and the Lake Merritt/Uptown District; and, 2) adopt the Agency resolution authorizing payment of the Redevelopment Agency's cumulative fiscal year 2011/12 fair share assessment in an amount not to exceed \$33,860.56 for Agency-owned properties in the Koreatown/Northgate Community Benefit District of 2007, the Downtown Oakland Community Benefit District of 2008 and the Lake Merritt/Uptown Community Benefit District of 2008.

Respectfully submitted,

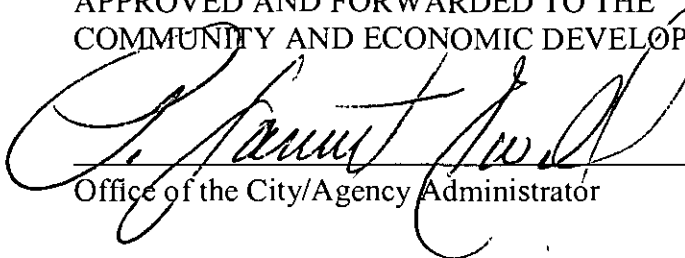


Walter S. Cohen, Director  
Community and Economic Development Agency

Reviewed by:  
Gregory D. Hunter, Deputy Director  
Community and Economic Development

Prepared by:  
Marja Rocha, Urban Economic Analyst  
Economic Development/Program Unit

APPROVED AND FORWARDED TO THE  
COMMUNITY AND ECONOMIC DEVELOPMENT COMMITTEE



Office of the City/Agency Administrator

## **EXHIBIT A**

To the Resolution Approving The Annual Reports Of The Lakeshore/Lake Park Business Improvement Management District, The Temescal/Telegraph Avenue Property Business Improvement District of 2005, The Laurel Property Business Improvement District of 2005, The Fruitvale Property Business Improvement District of 2006, the Koreatown/Northgate Community Benefit District of 2007, the Downtown Oakland Community Benefit District of 2008, and the Lake Merritt/Uptown Community Benefit District of 2008 Advisory Boards And Confirming The Continuing Annual Assessment For Each Apphcable District For Fiscal Years 2010/11 and 2011/12.

Annual Reports for:

- Lakeshore/Lake Park Business Improvement Management District
- Temescal/Telegraph Avenue Property Business Improvement District of 2005
- Laurel Property Business Improvement District of 2005
- Fruitvale Property Business Improvement District of 2006
- Koreatown/Northgate Community Benefit District of 2007
- Downtown Oakland Community Benefit District of 2008
- Lake Merritt/Uptown Community Benefit District of 2008

Lakeshore Avenue Business Improvement District  
P.O. Box 16268,  
Oakland, CA 94610  
510-451-1257

Lakeshore/Lake Park Avenues 2010 Annual Report to the City Council

1. Proposed changes in boundaries of BIMD.

None.

2. Improvements and activities provided during 2010

The sidewalks and gutters are cleaned daily on Lakeshore and Lake Park. The sidewalks are steam cleaned at least once a month. We continue to fund additional cleaning under the garbage cans and graffiti cleanup in our walkway area.

A private security officer continues to patrol the Avenues every day from noon until 7 PM including holidays. We have increased the hours of security to 8 hours a day, 3 days a week (high traffic days-Thursday, Friday, and Saturday) and maintain the 7 hour patrol schedule the other 4 days a week.

A landscape company plants and maintains the treewell gardens. They water as needed during the dry season. We have added the planting and maintenance of 5 additional tree wells. Three of those are in the Lake Park section of the district and 2 are on Lakeshore. We also fill in the unplanted tree wells with gravel at least once a year for sidewalk safety. This year we added a garden area in front of the gas station that is the gateway area to Lakeshore and Lake Park Avenues.

The BIMD was changing out the banners three times a year to include "Spare the Air" banners during the summer/fall, including across the street garlands, during seasonal changes. However, we have reduced those change outs to twice a year to save money.

The administrator visits and meets regularly with merchants and local residents, bringing their concerns to the Advisory Board and city and county agencies. She also arranges safety training through OPD for the merchants. The Advisory Board works with the merchants on holiday events three times a year, supporting activities, and funding necessary expenses. The BID Administrator works with merchants, city staff, and community members to organize and advertise the parades and other special holiday events. Our administrator continues to attend the Grand Lake Farmer's Market Liaison Advisory committee. We have joined forces with merchants on Grand Avenue for free weekend music events. The LABID procures and pays for the necessary permits.

This year we decided to forgo LakeFest due to insurance and operator concerns. We have put on the annual Halloween parade, the Easter parade, and a gala winter holiday event with horse and carriage rides. Lakeshore also participated in the city-wide retail events in October and December.

As a result of not holding the street festival this year, we are considering proposals to make some capital improvements to the street. We are taking bids and getting neighborhood input on building a deck/street extension next to the bulbout/crosswalk in front of Arizmendis. It will be modeled after some of the ones that San Francisco has built such as the Divisadero Parklet between Hayes and Grove Streets.

We also hope to add a number of planters along the sidewalk to increase the impact of our gardening and beautification efforts. We are currently considering their placement and taking bids for purchase and planting.

3. Improvements to be provided during the fiscal year 2010-2011.

We have agreed to maintain planters which we hope the city will install as described by the Lakeshore/Lake Park Traffic Calming committee as a gateway to the Avenue and a traffic calming and pedestrian safety device.

4. Estimate of the cost of providing services.

Please see attached budget, including reserves held out until all assessments are paid.

5. Method and Basis of Levying the Assessment.

The assessments will be collected by Alameda County and turned over to the City Treasury Office which forwards them to the Lakeshore/Lake Park Advisory Board. We proposed a 2% increase last year which brings our current assessment rate to: frontage charges of \$23.66 per linear foot per year and lot size charges per square foot of \$0.2753 per year factored together.

We propose an increase of 5% assessment for the coming year to cover the cost of consultants to renew the BID. Our new assessment rates will be \$24.84 per linear foot and lot size charges per square foot of \$0.289 per year factored together.

6. Surplus or Deficit to be Carried Over From Previous Fiscal Year

It is anticipated that approximately \$10,532.75 will carry forward from the previous fiscal year into the FY 2010/11 budget. These funds will be used to maintain a reserve in case of the continued non-payment of a large property owner.

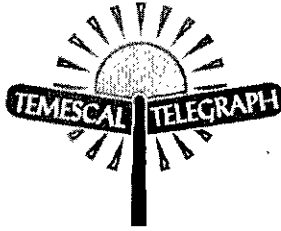
7. Contributions from other sources.

None.

**Lakeshore Avenue  
Business Improvement District  
Post Office Box 16268  
Oakland, California 94610**

<b>LAKESHORE/LAKE PARK BIMD PROPOSED BUDGET FOR 2011</b>	
Description	Amount
<b><i>Income</i></b>	
Estimated BID Collections	\$142,788.48
Total Income	\$142,788.48
Carry Forward 2010, (Reserve for Nonpayment) (Interest Bearing)	\$10,532.75
Total Available Funds	\$153,321.23
<b><i>Expenses</i></b>	
Administration	-\$38,000.00
Annual Meeting	-\$700.00
Beautification:	-\$13,200.00
Banners -\$2,000.00	
Gardeners -\$11,200.00	
City & County Collections Cost (1.7%)	-\$2,427.41
Insurance	-\$1,925.00
Maintenance: Sweepers; Steam Cleaners	-\$30,300.00
Office Expenses	-\$1,500.00
Professional Expenses	-\$650.00
Promotions; Capital Improvements	-\$6,000.00
Security	-\$50,000.00
Total Expenses	-\$144,702.41
Reserve for Nonpayment (Year-End Balance)	-\$8,618.82
Total Expenditures	-\$153,321.23

SHB:cm  
2010proposedbudget.doc  
updated 08/25/10



Temescal Telegraph Avenue Community Association (TTCA)  
Business Improvement District  
6<sup>th</sup> Annual Report to City Council  
2010

**I. PROPOSED CHANGES IN THE BOUNDARIES OF THE BID OR IN ANY BENEFITS ZONES WITHIN THE DISTRICT:**

None

**II. IMPROVEMENTS AND ACTIVITIES PROVIDED DURING FISCAL YEAR 2009 - 2010**

The following are the major improvements and activities provided:

**ORGANIZATION**

- Renewed contract with experienced part time coordinator to manage district's activities and to collaborate closely with CEDA, Public Works, and the Councilmember's office.
- Updated Strategic Plan document through 2012 to cover organization's priorities and for public presentation.
- Advocated for the district through participation on the Oakland Merchants Leadership Forum and the Oakland Business Improvement Council.
- BID continues to be organized around the nationally recognized Main Street™ approach utilizing standing committees (Design, Promotion, Economic Development, and Organization) that meet regularly. It also addresses Security issues through "Merchant Watch" strategy and close collaboration with the Neighborhood Crime Prevention Council. It continues to diversify its stakeholders.
- Conducted regular letter and email campaigns to property owners and merchants to inform them of BID activities.
- Established offices at 510-49<sup>th</sup> Street #203 for increased presence in the neighborhood and a central location for tiles.
- San Francisco Business Times article dated July 9, 2010, profiled BIDs and their success commemorating our fifth anniversary and emphasizing the increase in Temescal sales tax revenue and zero vacancies: <http://sanfrancisco.bizjournals.com/sanfrancisco/stories/2010/07/12/storv6.html>

## **ECONOMIC DEVELOPMENT**

- Updated inventory of Temescal commercial vacancies that appears on website <http://www.temescaldistrict.org/vacancies.html>.
- Provided support to new businesses interested in moving into the area that will enhance the current business mix including Tara's Organic Ice Cream, Remedy Cafe. Temescal is fully leased in spite of recession! Provided letter of support for Jewish Day Child Care Center going into 5811 Racine.
- Conducted monthly Merchant Mixers throughout the year attended on average by 15 - 20 merchants covering various topics including Merchant Watch, Retail Promotions, Parking and Social Media
- Communicated with numerous brokers and prospective tenants regarding vacant spaces

## **DESIGN**

- Renewed agreement with experienced Neighborhood Cleanliness Crew to provide sidewalk sweeping and landscaping five days a week (Tuesday through Saturday to Zone 1 (Telegraph Avenue from 4501 to the freeway) (51<sup>st</sup> Street from the freeway to one block east of Telegraph Avenue) and Zone 3 (Frontage and lot size at Oakland Children's Hospital) (576 to 747-52<sup>nd</sup> Street which includes the freeway underpass on 52<sup>nd</sup> Street).
- Provide sidewalk sweeping and landscaping in Zone 2 "South" (40<sup>th</sup> to 45<sup>th</sup>) five days a week. Provide these same services three days a week (Tuesday, Thursday and Saturday to Zone 2 (Telegraph Avenue from 5601 to 6699)(4501 to 5216 Shattuck Avenue, 5160-5263 Claremont Avenue and 5811 – 5964 Racine Street)
- Provide sidewalk steam cleaning and graffiti abatement as needed to the entire area on a quarterly basis
- Placed identity plaques with Temescal Telegraph logo on existing hundred planters along Telegraph Avenue as part of branding strategy and strategy for reduction in graffiti occurrences.
- Advocacy with Public Works and Cal Trans for maintenance along Telegraph Avenue to take care of freeway entrances and signage, graffiti on parking meters and public signage, as well of repainting of the street light poles as part of compliance to baseline agreement.
- Installed additional phases of murals on PG&E building on 51<sup>st</sup> in collaboration with California Arts Academy. These mural help liven up gateway and create a better connection between Children's Hospital and the Temescal district as well as deter graffiti
- Awarded a \$15,000 Oakland Cultural Arts Grant for phase I of a project called "Temescal Flows" to create a gateway on freeway overpass between Children's Hospital and Temescal's Telegraph Avenue to supplement the \$70,000 BID contribution; contracted with Alan Leon, muralist, to undertake project after a competitive process.
- Awarded an additional \$10,000 grant (by Alan Leon) for phase II of "Temescal Flows"

- Completed collaboration to decorate thirteen utility boxes to date to promote community art and deter graffiti
- Awarded two mini grants, \$500 each for projects in the district
  - ◆ Community Planting of nice foliage on 42<sup>nd</sup> Street next to Sadieday's Café
  - ◆ Planting on public median at 51<sup>st</sup> street, gateway to Temescal
- Awarded a \$75,000 NPI grant for public lighting grant on Telegraph Avenue.
- Applied for a MTC grant (\$2 million) in collaboration with the City. Finished just below the cutoff of grant recipients. Unfortunately we were not awarded any funding.
- Advocated regarding disrepair of Telegraph between Aileen and 51<sup>st</sup>.

### **PROMOTION**

- 7<sup>th</sup> annual Temescal Street Fair once again turned a profit during a difficult fundraising year in today's economy. Event is persistently lauded as a unique, homegrown event
- Held successful 4<sup>th</sup> annual safe Temescal Trick or Treat
- Held 1<sup>st</sup> annual Taste of Temescal showcasing 20 restaurants and the district's transformation as a gourmet destination. This event helps increase nighttime community activity too. Event raised over \$8,000 for the local schools (Emerson Elementary, Claremont Middle, & Oakland Tech) as well as non-profits Women's Cancer Resource Center and Good Cents for Oakland.
- Submitted regular articles to the Temescal News & Views while subsidizing printing efforts for it to continue operations
- Maintained website [www.temescaldistrict.org](http://www.temescaldistrict.org) that includes a business directory.
- Sponsored the 3rd annual summer Temescal Street Cinema in order to increase nighttime community activity and enhance security.
- Continued to support widely successful Farmer's Market through promotional efforts
- Telegraph Avenue banner poles at 49<sup>th</sup> continue to promote events including Festival, Farmer's Market, Holiday, and Temescal is blooming theme.
- Began efforts to convert website from static layout to a dynamic word press website that accommodates more interactivity and allows for enhanced social networking.
- Established Temescal district presence on Facebook.
- Contracted with Community Journalist to enhance Internet social media efforts

### **SECURITY**

- Developing further Merchant Watch concept in lieu of reduced police which includes the loss of our walking and problem solving officer.
- Send out regular email blasts to merchants as part of Merchant Watch efforts.
- Hired private security during for Holiday season.



### **III. IMPROVEMENTS AND ACTIVITIES BEING CONSIDERED DURING 2010/2011**

#### **ORGANIZATION**

- Advocate for the district through the Oakland Business Improvement Council moderated by the Oakland Chamber of Commerce
- Adding specialized listserv that supports the merchants.
- Increase staffing needs as organization grows its activities and streetscape projects requiring regular maintenance

#### **DESIGN**

- Continuation of sidewalk steam cleaning and graffiti abatement
- Continuing to pursue funding for a streetscape improvement plan which will include crosswalk improvements, countdown pedestrian signals, and pedestrian lights, starting at 52<sup>nd</sup> and going south towards 40th St.
- Increase Graffiti abatement strategies above and beyond the City's current
- Introduce another art project collaboration with California College of the Arts which might include a mural or the waste receptacles
- Advance specific façade projects addressing problem buildings working with property owners and code compliance to find solutions.
  - 490-43<sup>rd</sup> Street
  - 497-43<sup>rd</sup> Street
  - Steele's -5987 Telegraph
- Phase 3 - Install 50 additional Planters throughout Telegraph Ave. including Shattuck and Claremont to complement 100 existing ones along Telegraph
- Exploring a "Temescal over Time" preservation project that places historic markers on businesses in collaboration with Jeff Norman, local historian.
- Add and also enhance existing trash cans through paint and adorn with flags on door openings
- Add a second set of banners to district that rotate or interchange with existing ones.
- Conduct a Parking Needs Assessment as parking begins to become a problem. Collaborate with AC Transit on proposed BRT which could impact neighborhood parking.
- Complete first and second phase of Temescal Flows project on 52<sup>nd</sup> Street underpass.
- Implementing NPI pedestrian lighting grant

#### **PROMOTION**

- Continue to provide regular email communication with stakeholders.
- Conduct 5<sup>th</sup> annual Temescal Trick or Treat
- Hold 4<sup>th</sup> annual Holiday Event to once again include an ice skating rink.
- Conduct 3<sup>rd</sup> "Taste of Temescal" with proceeds going to local non-profits including the local schools' PTAs.

- Explore adding springtime concerts which involve Oakland Tech High and their drama and music departments.
- Adding Temescal Turkey Trot Fun Run as part of Hip Happenings in collaboration with Gym Fitness.

**SECURITY**

- Continue to support Merchant Watch communications and find innovative options to respond to crime concerns including private security and Twitter.
- Advocate for police support in lieu of loss of Walking and Problem Solving Officer

**ECONOMIC DEVELOPMENT**

- Continue to monitor economic trends in the district and inventory space to attract the right business mix.
- Continue to update space locator system to enhance Temescal business mix.
- Continue communications with numerous brokers and prospective tenants regarding vacant spaces

**AN ESTIMATE OF THE COST OF PROVIDING THE IMPROVEMENTS AND THE ACTIVITIES FOR 2010/11**

Please see attached fiscal 2010/11 budget. It was adopted at the September 2010 Board meeting.

**IV. METHOD AND BASIS OF LEVYING THE ASSESSMENT**

A 5% increase is proposed for 2011 and is included in the following table

<i>Property Variable</i>	<i>Benefit Zone 1</i>	<i>Benefit Zone 2</i>	<i>Benefit Zone 3</i>
Lot Size	\$0.09043	\$0.054659	\$0.010765
Building Size	\$0.07056	\$0.027167	---
Linear Frontage	\$7.8900	\$1.367589	\$12.78623

**V. SURPLUS OR DEFICIT FOR 2010**

Please see attached 2010/11 budget for surplus/reserves information. We have one major expenditure planned, that of \$70,000, for the Temescal Flows mural project at the 51<sup>st</sup> Street overpass, in 2011. The organization has carefully assessed its various needs continuing to prioritize capital streetscape improvements consistent with the 2005 proposed Telegraph Avenue Streetscape Plan.

The Pedestrian Oriented Street Lighting Program along Telegraph has been the highest priority capital improvement program of the TTBID since the independent study of security measures we funded over 4 years ago. It simultaneously achieves three important objectives of the TTBID:

1. Improve security in the commercial district

2. Improve shopper ambience in the commercial district, including a perception of increased safety
3. Enhance district identification

The cost for this project is \$715,292 to install lights on Telegraph from 42<sup>nd</sup> to Woolsey. Several efforts to obtain outside funding for the program have had limited success: the NPI grants (\$75,000) to design and install the lights from 40<sup>th</sup> to between 42<sup>nd</sup> and 43<sup>rd</sup> (which will require additional support from the TTBID that is budgeted for 2011). These lights are now on track to be installed in 2011.

We applied for 2010 MTC grant funds and were a finalist right at the cut off line right below the actual grant beneficiaries. We will continue to explore grant opportunities and other stimulus grants.

The extreme budget stresses at all levels of government make the prospects for additional funding unlikely. For the TTBID to execute its highest priority capital project, it is now turning to our own devices. That includes triggering a 5% increase on the 2011 property tax rolls as permitted under the 2004 Temescal Telegraph Avenue Management District Plan.

#### **VI. THE AMOUNT OF ANY CONTRIBUTIONS TO BE MADE FROM SOURCES OTHER THAN ASSESSMENTS LEVIED**

Please see attached fiscal 2010/11 budget information.

**TEMESCAL/TELEGRAPH BUSINESS IMPROVEMENT DISTRICT  
2010-2011 BUDGET Adopted**

Assessments =	\$245,700
Interest income	\$4,914
<b>Total Allocated revenue</b>	<b>\$250,614</b>

Pct Allocation per MDP					
	Zone	250,827	2	3	Total
Program		53.60%	36.40%	10.00%	100.00%
PROWSO	61.5%	33.0%	22.4%	6.2%	61.5%
Marketing	10.4%	5.6%	3.8%	1.0%	10.4%
Admin	18.7%	10.0%	6.8%	1.9%	18.7%
Contingency	9.4%	5.0%	3.4%	0.9%	9.4%
<b>Total</b>	<b>100.0%</b>	<b>53.6%</b>	<b>36.4%</b>	<b>10.0%</b>	<b>100.0%</b>

Pct allocation, proposed budget					
	Zone	1	2	3	Total
Program		53.60%	36.40%	10.00%	
PROWSO	55.0%	27.0%	23.0%	5.0%	55.0%
Marketing	13.4%	10.0%	2.4%	1.0%	13.4%
Admin	24.3%	13.0%	8.9%	2.4%	24.3%
Contingency	7.3%	3.6%	2.1%	1.6%	7.3%
<b>Total</b>	<b>100.0%</b>	<b>53.6%</b>	<b>36.4%</b>	<b>10.0%</b>	<b>100.0%</b>

Expected Operating Expenditures								Total
<b>PROWSO</b>								
Allocated Revenue								\$ 137,838
Proposed Expenditures								\$ -
	Sidewalk Sweeping			\$ 40,518	\$ 33,034	\$ 7,600		\$ 31,460
	Steam Cleaning			\$ 2,500	\$ 2,500	\$ -		\$ 5,000
	Landscaping			\$ 8,000	\$ 6,000	\$ 800		\$ 14,800
	Graffiti Removal			\$ 5,000	\$ 2,000	\$ 500		\$ 7,500
	administration			\$ 8,149	\$ 5,534	\$ 1,520		\$ 15,204
	security in December			\$ 3,000				\$ 3,000
	Improvement Mini Grants			\$ 750	\$ 750			\$ 1,500
	<b>Total Proposed PROWSO Expenditures</b>			<b>\$ 68,217</b>	<b>\$ 49,818</b>	<b>\$ 10,428</b>		<b>\$ 128,464</b>
	<b>PROWSO Pro Forma Surplus / (Deficit)</b>			<b>\$ (552)</b>	<b>\$ 7,823</b>	<b>\$ 2,102</b>		<b>\$ 9,374</b>
<b>MARKETING AND IDENTITY ENHANCEMENT</b>								
Allocated Revenue								\$ 33,582
Proposed Expenditures								\$ -
	Temescal Street Fair				\$ -			\$ -
	December Holiday Event			\$ 2,500	\$ 500	\$ 500		\$ 3,500
	Turkey Trot				\$ 1,000			\$ 1,000
	Street Cinema			\$ 5,500				\$ 5,500
	printing			\$ -	\$ -	\$ -		\$ -
	Halloween Event			\$ 536	\$ 364	\$ 100		\$ 1,000
	Cross-Telegraph Banner			\$ 1,368	\$ 432			\$ 1,800
	Website			\$ 4,824	\$ 3,276	\$ 900		\$ 9,000
	Exec Directors Fees			\$ 4,502	\$ 3,058	\$ 840		\$ 8,400
	<b>Total Proposed Marketing Expenditures</b>			<b>\$ 19,230</b>	<b>\$ 8,630</b>	<b>\$ 2,340</b>		<b>\$ 29,200</b>
	<b>Marketing Pro Forma Surplus / (Deficit)</b>			<b>\$ 5,831</b>	<b>\$ (2,615)</b>	<b>\$ 166</b>		<b>\$ 4,382</b>

Notes

ADMINISTRATION							
Allocated Revenue				\$ 32,580	\$ 22,305	\$ 6,015	\$ 60,899
Other							\$ -
Proposed Expenditures							
Executive Director fees				\$ 13,400	\$ 9,100	\$ 2,500	\$ 25,000
Rent				\$ 4,502	\$ 3,058	\$ 840	\$ 8,400
Phone and Internet				\$ 804	\$ 546	\$ 150	\$ 1,500
Food for meetings				\$ 804	\$ 546	\$ 150	\$ 1,500
Admin assistant				\$ 4,824	\$ 3,276	\$ 900	\$ 9,000
Legal and Accounting				\$ 3,216	\$ 2,184	\$ 600	\$ 6,000
Insurance				\$ 3,109	\$ 2,111	\$ 580	\$ 5,800
Office Supplies and Other				\$ 1,072	\$ 728	\$ 200	\$ 2,000
Other							
Total Proposed Administration Expenditures				\$ 31,731	\$ 21,549	\$ 5,920	\$ 59,200
Administration Pro Forma Surplus / (Deficit)				\$ 849	\$ 756	\$ 95	\$ 1,699
CONTINGENCY							
Allocated Revenue				\$ 9,022	\$ 5,263	\$ 4,010	\$ 18,295
Other							\$ -
Proposed Expenditures							
PROWSO Deficit				\$ 552	\$ -	\$ -	\$ 552
Marketing Deficit				\$ -	\$ 2,615	\$ -	\$ 2,615
Administration Deficit				\$ -	\$ -	\$ -	\$ -
Other							\$ -
Total Proposed Contingency Expenditures				\$ 552	\$ 2,615	\$ -	\$ 3,166
Contingency Pro Forma Surplus / (Deficit)				\$ 8,471	\$ 2,648	\$ 4,010	\$ 15,128
TOTAL BUDGETED REVENUE				\$ 134,329	\$ 91,223	\$ 25,061	\$ 250,614
Check				53.6%	36.4%	10.0%	
TOTAL PROPOSED EXPENDITURES				\$ 119,179	\$ 79,997	\$ 18,688	\$ 216,864
TOTAL PRO FORMA SURPLUS / (DEFICIT)				\$ 15,150	\$ 11,227	\$ 6,373	\$ 33,750

## RESERVES

Change in Reserves, FY10/11		Zone 1	Zone 2	Zone 3	Total	
(from above)	PROWSO surplus(deficit)	\$ (552)	\$ 7,823	\$ 2,102	\$ 9,374	
	Marketing surplus(deficit)	\$ 5,831	\$ (2,615)	\$ 166	\$ 3,382	
	Administration surplus(deficit)	\$ 849	\$ 756	\$ 95	\$ 1,699	
	Contingency revenue	\$ 9,022	\$ 5,263	\$ 4,010	\$ 18,295	
	Sub-Total	\$ 15,150	\$ 11,227	\$ 6,373	\$ 32,750	
RESERVES, Prior Years						
(see worksheet)	PROWSO Reserves	\$ 86,771	\$ 15,014	\$ 29,175	\$ 130,959	
	Marketing Reserves	\$ 3,279	\$ 33,246	\$ 7,574	\$ 44,100	
	Administration Reserves	\$ 8,574	\$ 21,539	\$ (373)	\$ 29,741	
	Contingency Reserves	\$ 51,939	\$ 36,305	\$ 15,185	\$ 103,429	
	Sub-Total	\$ 150,563	\$ 106,104	\$ 51,562	\$ 306,229	
TOTAL RESERVES, FYE 6/30/11 projected		PROWSO	\$ 86,219	\$ 22,837	\$ 31,277	\$ 140,333
(before capital expenses)	Marketing	\$ 9,110	\$ 30,631	\$ 7,740	\$ 47,482	
	Administration	\$ 9,423	\$ 22,295	\$ (278)	\$ 31,440	
	Contingency	\$ 60,961	\$ 41,568	\$ 19,195	\$ 121,724	
	Total	\$ 165,713	\$ 117,331	\$ 57,935	\$ 340,979	

Notes

**PROPOSED EXPENSES AGAINST RESERVES, FY10/11**

Notes

	Zone 1	Zone 2	Zone 3	Total
<b>Pedestrian scale lighting</b>				
Project cost				
Spent prior to current FY				
Current FY dedicated revenue				
Current FY Proposed expenditure				
<b>Ped oriented building lighting 40th-42nd St</b>				
Project cost	\$33,375	\$22,665	\$6,227	\$62,266
Spent prior to current FY	\$21,390	\$14,526	\$3,991	\$39,907
dedicated revenue	\$18,760	\$12,740	\$3,500	\$35,000
Current FY Proposed expenditure	-\$6,776	-\$4,601	-\$1,264	-\$12,641
<b>Fed oriented street lights 40th-42nd St</b>				
Project cost	\$49,312	\$33,488	\$9,200	\$92,000
Spent prior to current FY	\$9,177	\$6,232	\$1,712	\$17,122
dedicated revenue	\$22,512	\$15,288	\$4,200	\$42,000
Current FY Proposed expenditure	\$17,623	\$11,968	\$3,288	\$32,878
<b>PGE Mural</b>				
Project cost	\$ 9,198	\$ 6,246	\$ 1,716	\$17,160
Spent prior to current FY				\$13,160
Current FY dedicated revenue				\$0
Current FY Proposed expenditure	\$ 2,144	\$ 1,456	\$ 400	\$4,000
<b>Planters</b>				
Project cost				
Spent prior to current FY	\$ 11,070	\$ 7,518	\$ 2,065	\$20,653
Current FY dedicated revenue				
Current FY Proposed expenditure	\$ 13,400	\$ 9,100	\$ 2,500	\$25,000
<b>52nd St Underpass Public Art</b>				
Project cost	\$ 36,174	\$ 18,087	\$ 36,174	\$90,436
Spent prior to current FY	\$ 855	\$ 581	\$ 160	\$1,596
Current FY dedicated revenue	\$ 7,999	\$ 4,000	\$ 7,999	\$19,998
Current FY Proposed expenditure	\$ 27,537	\$ 13,768	\$ 27,537	\$68,842
<b>Temescal/Telegraph Banners</b>				
Project cost				
Spent prior to current FY	\$ 11,455	\$ 7,779	\$ 2,137	\$21,372
Current FY dedicated revenue				
Current FY Proposed expenditure	\$ 10,720	\$ 7,280	\$ 2,000	\$20,000
<b>Parking study</b>				
Project cost	\$ 16,080	\$ 10,920	\$ 3,000	\$ 30,000
Spent prior to current FY				
dedicated revenue	\$ -	\$ -	\$ -	
Current FY Proposed expenditure	\$ 16,080	\$ 10,920	\$ 3,000	\$ 30,000
<b>5 year Capital Plan Fundraising expense</b>				
Project estimate	\$ 48,240	\$ 32,760	\$ 9,000	\$ 90,000
Spent prior to current FY	\$ 52,260	\$ 35,490	\$ 9,750	\$ 97,500
Current FY Proposed expenditure	\$ -	\$ -	\$ -	\$ -

**TOTAL Proposed Expenditures Against Reserves**                      \$80,728              \$49,891              \$37,461              \$168,079

**EXPECTED RESERVES, FYE 6/30/11**              \$ 84,985    \$ 67,440    \$ 20,474    \$ 172,900

**3rd DRAFT**

**Telegraph Avenue Pedestrian Oriented Lighting Finance Plan - For Discussion**

January 25, 2011

**POSSIBLE SOURCES OF FUNDS**

**1. LOAN**

Annual BID Surplus & Cash Flow Dedication (See page 2 for detail)

PROWSO	\$ 24,830
Marketing	\$ 10,000
Contingency	\$ 15,400
<b>Available for Annual Debt Service</b>	<b>\$ 50,230</b>

<b>Estimated Loan Available</b>	<b>Rate</b>	<b>Years</b>	<b>Loan</b>
	8%	4	\$150,000

**2. CURRENT BID RESERVES**

	Zone 1	Zone 2	Zone 3	TOTAL
Budget "Expected FYE 6/30/11"	\$78,589	\$63,096	\$19,281	\$160,966
Credit back "Parking Study"	\$16,080	\$10,920	\$3,000	\$30,000
Credit back error re bldg lighting	\$11,985	\$8,139	\$2,236	\$22,360
Credit back error re ped lighting	\$9,899	\$6,722	\$1,847	\$18,468
<b>TOTAL RESERVES AVAILABLE</b>	<b>\$116,553</b>	<b>\$88,877</b>	<b>\$26,364</b>	<b>\$231,794</b>

**3. CIVIQ** (Estimate) \$ 100,000

**4. INCREASED ASSESSMENT REVENUE** \$/Year 3 Yr Total  
 at 5%/year increase \$ 12,000 \$36,000 \$ 36,000

**TOTAL FUNDS ASSUMED AVAILABLE \$517,794**

**OTHER POSSIBLE SOURCES**

4th Bore Funds \$200,000

**TOTAL FUNDS WITH OTHER POSSIBLE SOURCES \$717,794**

**BUDGETED USES OF FUNDS**

Phase 2: **Telegraph: 42.5 thru 52nd**

# Blocks	9.5
# Lights	38
Sub-Total	\$479,385
Contingency	\$23,969 5%
<b>TOTAL BUDGET COST</b>	<b>\$503,354 (Phase 2)</b>

Phase 3: **Telegraph: Alcatraz to Woolsey**

# of Blocks	4
# of lights	16
Sub-Total	\$201,846
Contingency	\$10,092 5%
<b>TOTAL BUDGET COST</b>	<b>\$211,938 (Phase 3)</b>

**TOTAL BUDGET COST \$715,292 (PHASES 2 & 3)**

**PROPOSED SOURCES FROM CURRENT BUDGET**

**PROWSO**

Reduce Zone 1 Street Sweeping to 3 days/week	\$	16,330
Reduce Steam Cleaning 25%	\$	1,500
Reduce Graffiti Removal 33%	\$	2,500
Eliminate Security in December	\$	3,000
Eliminate Mini Grants	\$	1,500
<b>Proposed PROWSO Savings</b>	<b>\$</b>	<b>24,830</b>

**Marketing**

Convert Street Cinema to self-sustaining	\$	5,500
Reduce Website 50%	\$	4,500
<b>Proposed Marketing Savings</b>	<b>\$</b>	<b>10,000</b>

**Contingency**

<b>Allocate 70% of Contingency</b>	<b>\$</b>	<b>15,400</b>
<b>Available for Annual Debt Service</b>	<b>\$</b>	<b>50,230</b>

**BUDGET COST ASSUMPTIONS FROM PHASE 1 PROJECT**

Phase 1:

**Telegraph: 40th St.- 42.5 St.**

Engineering	\$35,000
Installation (Per bid)	\$129,000
<b>Total Cost</b>	<b>\$164,000</b>
# Lights	13
Cost per Light	\$12,615
Blocks	2.5
Lights / Block	4 (typical conditions)
Calculated Cost/Block	\$50,462 (typical conditions)

**Funded: NPI Grant \$ 75,000  
 BID Funds \$ 54,000**





BUSINESS IMPROVEMENT DISTRICT  
ANNUAL REPORT TO CITY COUNCIL 2010

I. Proposed Changes in the Boundaries of the BID or in any Benefits Zones Within the District:

No proposed changes.

II. A. Improvements and Services Provided 2010

- Contributed \$20,000 to replace the ballasts and triple the brightness of 30 pedestrian street lamps on MacArthur Blvd between 35<sup>th</sup> Avenue and High Street. Functions as both a security and customer attraction feature.
- Created the Laurel Security Ambassador Program, in conjunction with Urban Shield Security. The Laurel Security Ambassador Program utilizes pro-active, community building strategies to work with "high-risk" individuals and groups in the district to improve communications, security and safety for customers and merchants.
- In conjunction with CEDA, working on a Design Guidelines document (in progress) that will help guide future façade improvements and development initiatives. Part of a 2011 effort to create a Specific Plan for the district (see 2011 Services).
- Completed the Laurel Merchant Façade Improvement Campaign. Worked with a total of 9 Laurel businesses to improve their storefront appearances. Provided personalized design advice and provided merchants with an up to \$1000 match fund (per merchant) for façade improvements. Also facilitated communications with CEDA to assist merchants with existing city façade improvement applications.
- Continued expanded public exposure of the Laurel District "Leaf" logo and marketing materials. Expansion of our "Grow the Laurel" marketing campaign aimed at promoting local businesses.
- Continued with the production of 2 mass-distributed Laurel Coupon Books. Created an enhanced format for marketing attraction purposes. Participation increased to 30+ merchants per book. Through the coupons books, we created 15 original logos and artwork for merchants who did not have them previously, helping them improve their own visual appearance on letterhead, marketing and storefront designs.
- Coordinated 8 major public events as diversified marketing tools for the BID. Events included: District 4 City Council Candidate Forum, Halloween, Holiday Toy Drive, Lunar New Year, Turfin 247 Dance Tournament (3 events), and the Laurel Street Fair. Worked with Laurel Village Association (residents), Allendale Recreational Center, and
- Provided \$14,000 sponsorship of Annual Laurel Street Fair. The Laurel Street Fair was a highly successful event for the district. Focusing on community participation, neighborhood coordination and job creation, the Laurel Street Fair increased in number of booths (120) and attendance (estimate 6,000), and received positive public press.
- The Turfin 247 Dance Tournament was a pro-active, community building security measure designed to engage youth and young adults in our district, and continues to be very successful event supported by the Laurel Merchants. The event received very positive citywide press and positive online reviews.

- Coordinated the creation of 3 new public art installations for businesses along MacArthur Blvd. The public art pieces have been a highly effective deterrent to vandalism and tagging. To date no reported incidents of tagging on any public art pieces.
- Mass distribution of marketing materials throughout the year (posters, flyers, stickers, planning for website). All businesses in the district have at least one prominently visible representation of the district logo and marketing materials in their stores.
- Extensive use of multimedia communication tools: merchant email bulletin and listserv to facilitate board to business and business to business communication on a weekly basis.
- Continued development of the "Laurel Street Team" that encourages young people in the district to help with board-to-business and business-to-business communications as well as beautification and public art efforts. The street team now plays an essential role in LDA weekly operations.
- Continued ongoing communication with merchants by going door to door on a weekly/bi-monthly basis, as well as provide written and online documentation and notification of BID activities.
- Sustained attendance and participation in merchant meetings and marketing efforts. Current meetings continue to average 15-20 merchants per meeting.
- Acted as a communications liason between property managers, merchants, City Council members and residents in several contentious events regarding controversial businesses in the shopping corridor.
- Successfully recruited two new board members with extensive professional, managerial and communications and planning experience.
- Local landscaper (studying horticulture at Merritt College) continue to maintain the planters.
- Provide maintenance services consisting of 5 days/week trash removal, sidewalk sweeping, graffiti abatement, watering and steam cleaning on a annual basis.
- Working extensively with Mills University in the development of materials to facilitate zoning discussions, to create public art projects, to engage students in activities in the Laurel, and to co-produce public events.
- Working with Laurel Village Association to help boost their public events. Designed poster and logo for their "Laurel Summer Solstice Event." Assisted in logistics and marketing.

## II. B. Improvements and Activities to be Provided 2011

- Creation, funding and fundraising for a Specific Plan for the Laurel commercial corridor. Working with Mills College Department of Public Policy to design a specific plan that will guide future development of the corridor.
- Creation of a Design Guidelines document as a feature of the Specific Plan. To assist in guiding future façade improvement projects and development efforts.
- Assume fiscal and operational responsibilities for tree-trimming and increased lighting in the shopping corridor.
- Continued development of the Laurel Ambassador Security Program. Continue to work with City Attorney's Office, OPD, NCPC, and local recreation centers and public service organizations in implementing strategies to make the business district safer for merchants and shoppers.

- Creation and coordination of a **Business Attraction** merchant committee that will oversee 4 community and merchant surveys, and initiatives to bring new businesses into the shopping corridor. Work with CEDA staff on targeted marketing for district to assist property owners in filling vacancies.
- Creation and coordination of a **Health and Wellness** merchant committee that will oversee marketing efforts for healthcare professionals in the shopping corridor.
- Production for a new set of street banners for 2011.
- Work with **Laurel Village Association** (residents), **East Oakland Rotary Club**, **Allendale Recreational Center**, local schools and **NCPC** groups to continue produce public events for the community.
- Continue to work with 20-30 merchants on a quarterly neighborhood mailer marketing effort reaching 10,000 households in and near the Laurel District. Expand mailer marketing into new website and online marketing efforts.
- Overhaul and redesign the Laurel District Association website to be a useful marketing tool for property owners and the district.
- Increase communication between board and businesses, and collaboration between businesses through joint projects and planning in merchant meetings.
- Maintenance of public spaces: daily sidewalk sweeping, planter care and graffiti abatement.
- Expansion of the Annual Laurel Street Fair. This year we worked closely with residents and new merchants to produce the Fair. Currently working on projections to maximize profitability and sustainability.
- Maintain Regular Merchant meetings – specifically to look at marketing strategies to increase shoppers and cross market clients for the district.
- Organizational infrastructure development –organizational policies, bookkeeping and filing systems for long-term institutional memory.
- Provide assistance to businesses and property owners in accessing city resources and services.
- Continue to expand working relationship with Mills College to bring business, creative and social projects, technical assistance and expertise to corridor activities.

**III. An Estimate of the Cost of Providing the Improvements and the Activities for 2011. Request for a 2.5% increase in assessments.**

Please see attached budget for estimated costs. We are requesting an increase in assessments of 2.5% to help fund increased security efforts. Due to the current economic climate coupled with the reduction of OPD staffing, we are anticipating an increase in criminal activity in the district. The increased security funding will help mitigate this. Last fiscal year we spent \$44,207.99. The proposed 2.5% increase will add \$3734.54 to this amount for a total anticipated security expenditure of \$47,942.53.

**IV. Method and Basis of Levying the Assessment**

The method of levying the assessment has not changed from the adoption of the original ordinance. Incorporating the allowable 2.5% increase requested above it is as follows:

Property Variable	Size	Annual Cost	Building Use Code Applied	Estimated Total Generated by Variable	Percent of Total
Lot Square Footage	624,719 sf	\$0.1438	No	\$89,835	53
Building Square Footage (Range)	Type A= 248,851sf Type B-G= 97,768sf	Type A= \$0.09409 Type B= \$0.05346	Yes	\$28,641	17
Linear Frontage	8,016	\$6.3774	No	\$51,121	30
Single Family Home and Condo Annual	NA	\$258.30	Yes	\$0	0
Total Annual Budget				\$169,597	100

**V. Surplus or Deficit for 2011**

See attached budget for details.

**VI. Contributions from other sources.**

See attached budget for details.

Laurel District Association FY 2011-12 Adopted Budget		
Revenue*		
Projected Assessments 2011-2012:	\$ 169,597	
Anticipated Rollover from FY 10-11	\$ 109,110	
Total BID Balance for FY 2011-12	\$ 278,707	
	FY 11-12 Proposed Expenses	
<b>EXPENSES</b>		
<b>Organization</b>		
Rent		
Staffing		
LDA Manager	\$30,000	
Payroll Expenses	\$0	
Telephone & Fax	\$600	
Internet	\$140	
Insurance	\$3,500	
Accounting & Taxes	\$2,500	
Bank Charges/Interest		
Annual Dinner/Merchant Meetings/Memberships	\$1,300	
Office Supplies	\$300	
Postage		
Printing	\$1,500	
Unallocated/Misc		
<b>Subtotal</b>	<b>\$39,840</b>	
<b>DISI General</b>		
Graphic Design	\$0	
Directory	\$0	
Signage/Banners/Artwork/Decorations*	\$7,000	
Special Events & Marketing	\$10,000	
Street Festival	\$10,000	
Advertising	\$3,000	
Website	\$1,000	
Unallocated		
<b>Subtotal</b>	<b>\$41,000</b>	
<b>PROWSO</b>		
Maintenance and Landscaping	\$45,000	
Capital Improvements	\$13,000	
Security	\$47,943	
Unallocated		
<b>Subtotal</b>	<b>\$105,943</b>	
<b>OTHER</b>		
County Fee (1.7%)	\$2,883	0.017
City Fee	\$500	
City Loan Payment	\$4,000	
<b>Subtotal</b>	<b>\$7,383</b>	
<b>Total Expenses for FY 2011-2012</b>		
	<b>\$194,166</b>	
Unallocated Reserves for Future LDA BID Activities	\$84,541	
<b>Total Expenses</b>	<b>\$278,707</b>	



# THE UNITY COUNCIL™

## Fruitvale Business Improvement Management District 2010 Annual Report to City Council

### 1. Proposed Changes in the Boundaries of the **BIMD** or in any Benefits Zones Within the District.

None.

### 2. Improvements and Activities Provided During Fiscal Year 2009-10

The following are the major improvements and activities provided:

#### Cleanliness

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- Peralta Service Corporation, the neighborhood Cleanliness Crew for the Business Improvement District (BID), provided more than 160 hours per week (every day except Sundays and holidays) of sidewalk, curb, and gutter sweeping; recycling; graffiti abatement in area 1; removal of illegally posted flyers and posters; reporting and removal of illegal dumping; throughout the BID. The cleaning group is well recognized by the merchants in the FBID. Residents and merchants also recognized the cleanliness of the area.

#### Beautification Physical Improvements

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- Fruitvale Alliance Group – The Alliance Group (a neighborhood volunteer action group organized by the Unity Council) planned activities at the Fruitvale Plaza Park corner of 35<sup>th</sup> Avenue and International Blvd. The Fruitvale Plaza Park has been transformed and is now a unique open space along International Blvd where many families and costumers enjoy the green area. The Alliance group, the AmeriCorps and other volunteers have scheduled a mosaic art project to start at the park on July-August 2010.
- Fruitvale Plaza Park, Clean up, garden work and information table - 7/ 11 over 14 volunteers participated in the effort to improve the park and provide important resources to the people who were passing by, encouraging them to report illegal activities.
- Creek to Bay Day – 9/19: Organized by the City of Oakland, the Unity Council rallied over 26 community volunteers and AmeriCorps members to clean the creek at Cesar Chavez Park and cleaned in and around the park. Creek cleaning included tree trimming, weeding, and garbage pickup.
- LOVE YOUR PARK DAY - 9/26: Organized by Oakland Park Coalition and Love Your Park Day, and annual survey event took place every year to report the condition of the park. A few members from the Alliance and two youth, surveyed at 5 parks: Josie De La Cruz, Fruitvale Plaza, Manzanita Park, Cesar Chavez and the annex of Cesar Chavez Park.
- Fruitvale Plaza Park Gardening - 12/19: over 16 volunteers participated in the efforts to improve the park. More than 49 native plants were planted at the site to improve the

garden. The strategies have been reducing the loitering and illicit positive activities at the park.

- **KEEP OAKLAND BEAUTIFUL - 12/22:** 200 Freesias and hundreds of California poppy seeds were planted along International Blvd, in the tree wells, and at the Fruitvale Plaza Park by the AmeriCorps and the Alliance Group,

Fruitvale Plaza Park Oakland Earth Day Celebration – 4/17: Over 30 participants from the AmeriCorps program, Alliance Group, merchants, Richard Fuentes from Ignacio De La Fuente's office, and Public Works assisted in accomplishing the activities at the park. The activities included: weeding the garden, sweeping, spreading wood chips on the garden, and disseminated over 200 packages that included important telephone number, to encourage neighbors to report blight or any other problems that occur at 35<sup>th</sup> and 36<sup>th</sup> Avenues.

- **Earth Day - April 17<sup>th</sup>**

27<sup>th</sup> Avenue Cleanup: 34 volunteers assisted in a neighborhood driven initiative by one of the volunteers, Luis Ortega. The solving Police officer was invited to the clean up. The kids enjoyed talking to the officer. The activities that took place were: weeding, sweeping and spreading wood chips on the garden the volunteers planted last year.

Great America Clean Up - 5/1/10: The Great America Clean Up was organized by Keep Oakland Beautiful, the Alliance members and Unity Council volunteers. The local clean up was conducted at 42<sup>th</sup> Avenue and Foothill Blvd. Family members of the Alliance Group were recognized at the Great America Clean Up for their continued efforts to improve the neighborhood.

## Safety

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Fruitvale Alive Streetscape Project: The Design Committee provided feed back to key city staff regarding the Fruitvale Alive Street Project on 3/22/10

34<sup>th</sup> Avenue Crosswalk Repair: Worked closely with the City of Oakland and staff from the councilmember Ignacio De La Fuente's office to repair the adjacent medians and crosswalks along International Blvd between 33<sup>rd</sup> and 35<sup>th</sup> Avenues. The total cost of the improvements on the crosswalks was approximately \$191,000.00 and was completed in October of 2009.

- **Chief Anthony Batts - 10/ 23:** The new Chief, Anthony Batts, in conjunction with a group of International merchants, Council member Ignacio de La Fuente, and the NSC, Ana M Martinez, walked along International Blvd and introduced themselves to the merchants. Merchants also welcomed Chief Batts to the Oakland Police Department.
- **Night Out Celebration at Fruitvale Plaza Park - 8/4:** Anti-crime event co-sponsored by the Oakland Police Department, City of Oakland, and the Unity Council the celebration was an opportunity to create more relationships between merchants, residents and City Officials and promotes collaboration on issues that affect the commercial and residential areas. The people enjoyed the celebration and approximately 160 participants attended.
- **Night Out Celebration at 33<sup>rd</sup> Avenue and Foothill Blvd. - 8/4:** Anti-crime event co-sponsored by the Oakland Police Department, City of Oakland, and the Unity Council at 33<sup>rd</sup> Avenue is an annual celebration where neighbors and merchants get to meet each other and

enjoy the celebration. The event has assisted in developing stronger relationships between OPD, residents and merchants. About 100 participants.

- **Neighbor Crime Prevention Council Meetings – ongoing:** We work very close with the Neighbor Service Coordinator and the solving Police Officer on the issues that affect the commercial area. Staff attends and participates in the monthly meetings and activities:
- **Crime Prevention Seminar for Retail Businesses in partnership with City of Oakland – Neighborhood Services Division & the Coliseum Business Alert's:**  
Two trainings were held one in April 28<sup>th</sup> at 1706 Fruitvale Christina Church, the other one in June 3<sup>rd</sup> 2010 at the Unity Council 1900 Fruitvale Avenue to train merchants on a variety of safety issues and available resources to better protect themselves and work with Police more effectively.

### Façade Improvements

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- The Unity Council assisted in the completion of 6 façade improvements in the BID. 1 major plaza was constructed in one block at 41st Avenue and International with 9 new spaces and 40 parking lots. The new construction looks beautiful. Total new facades 15

### Promotion

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Continued participation in the Oakland Merchants Leadership Forum and the Oakland Business Improvement District Council.

Promotion of the neighborhood included the following events:

- **Promotional Fruitvale Sale activities, Last Friday of the Month / October, November, December 2009**  
The last Friday of the month in October, November, and December we conducted activities at the International corridor where merchants advertised bargains to attract costumers to come to the International commercial corridor. The bargains were from 5:00 to 8:00pm the activities include DJ, face painting, and a clown. These events focused on entertainment and activities for the families. The Oakland Police department also participated in the effort by providing walking police officers on these dates.
- **Unity Council 45 Anniversary Annual Fundraising Event – 11/10:**  
The 45 Anniversary Annual Fundraiser Event took place at Scott's Restaurant Pavilion in Jack London Square. The event was an opportunity to recognize the many accomplishments of the Unity Council and its supporters. Many personalities attend the celebration. One of these attendees was Rosie Rios, the Treasurer of the United States and former Unity Council Board Member. Approximately 300 attendees.
- **14<sup>th</sup> Annual Día De Los Muertos Event – 11/1:** over 90,000 people attended the 14th Annual Dia de los Muertos celebration this year. Thanks to Council Member Ignacio De La Fuente the event took place this year. Many people enjoy the family festival and the exquisite food at the Fruitvale District.

**Canvas Promotional Bags Activity – 12/3:** Coordinated the business promotion project, in which the merchants purchased the promotional item (tote bags) collectively as a group and ordered 1,200 tote bags. The tote bags are 100% organic with the names of all the businesses in the Fruitvale. This served to promote and inform costumers to reduce the use of plastic bags and to also promote the Fruitvale District.



- **Volunteer Thank You Event – 12/11:** The Annual Volunteer Thank You event was held at the Fruitvale Senior Center on December 11<sup>th</sup>. Volunteers assisted with the organization and preparation of the event. Over \$600 in food donations by local businesses, councilmember Ignacio De La Fuente attended the celebration to thank the volunteers for their continuing commitment to volunteer and there were approximately 54 attendees.
- **Foothill Boulevard Las Posadas Celebration – 12/16:** At the request of the local merchants at the Foothill Boulevard business corridor, the Second Annual Las Posadas Event was held on December 16<sup>th</sup>. 20 volunteers assisted with the organization, outreach, and preparation of the event. Over \$900 in food was donated by local merchants and the cooking of traditional food and seasonal tea was provided by local restaurants, 120 attendees.
- **International Boulevard Las Posadas Celebration – 12/18:** Las Posadas Event was held on December 18<sup>th</sup> for the merchants. The Public Market and International Blvd made the traditional celebration possible. About 17 volunteers assisted with the organization, outreach, and preparation of the event. Over \$700 in food was donated by local merchants and the cooking of traditional seasonal tea was provided by the Public Market merchants, The councilmember Ignacio de la Fuente and the Oakland Merchants Leadership Forum also contributed to pay for a live music group that perform the day of the event at the Avenida De La Fuente Plaza. (150 attendees)
- **Que Paso The Fruitvale Business Improvement District Newsletter – 2/2010:** Over 1000 color copies of Que Pasa News brochures were printed and mailed property and merchant owner's to enlighten them of the improvements that are happening in the Fruitvale District. The before and after pictures of the redevelopment projects were displayed to show how the area has improved.

**Tour to an organization called PICO from Los Angeles – 2/20:** We gave a tour of the Fruitvale FBID to the PICO residents from Los Angeles. The participants were adults and young people. The PICO residents were very impressed with the development of the Fruitvale District and the improvements at the corridor. Their goal was to get ideas and obtain our best practices for resolving issues.

**Valentine's Day Activities on Saturday and Sunday – 2/13 & 2/14:** We had two days of activities with a DJ and face painting at the International corridor. Merchants made a contribution to pay for the DJ, the Alliance Group did the face painting, and merchants put excellent bargains that day to invite customers to shop locally.

**Mother Day Celebration – 5/9:** We celebrated Mother's Day with music and face painting at the corridor on International Blvd. Merchants also had bargains on their merchandise and discounts to attract customers to the area. The restaurants also were offering great deals to their customers on this date.

- **Dia de los Niños - 4/30/10:** In celebration of Dia de los Niños (day of the children), Fruitvale Public Market along with friends of Chavez Library, had children's activities and story telling. The event was held inside the market and along the plaza for increased public exposure.
- **Cinco De Mayo - 5/5/10:** in celebration of Cinco De Mayo, Fruitvale Public Market had music DJ, children's arts & crafts activities.

- **Oakland Indie Awards Celebrating Oakland Businesses and Local Artists - 5/14/10:** Hosted by One California Foundation in partnership with East Bay Express. About 1000 participants (businesses, artists, city staff, bank representatives and more), 3 merchants from the Fruitvale BID participated providing samples of their food and promoted their business.

**Weekly Farmers Market** were held on De La Fuente Plaza every Sunday and at the Fruitvale Village every Thursday.

### **3. Improvements and Activities To Be Provided During Fiscal Year 2010-11**

- Continuation of Neighborhood Cleanliness Crew Program
- Promotion and Support for the 15<sup>th</sup> Annual Día de los Muertos Festival and other events
- Continue to develop strong partnership with Oakland Police to ensure that business and property owners have a strong and supportive relationship with the Oakland Police
- Continued promotion and assistance to merchants for the City of Oakland's Façade improvement Program
- Advocacy for the district through the Oakland Merchants Leadership Forum and the Oakland Business Improvement District Council
- Continued participation in the Shop Oakland Campaign
- Develop a new business directory
- Commence the mural project at the I-880 Freeway underpass in Summer 2010
- Begin the tile project at the Fruitvale Plaza Park in Summer 2010
- Ongoing activities to promote and attract customers to the area
- Food tours with the partnership of the Heritage Alliance, Oakland Heritage Survey and the Unity Council summer of 2010
- Participate in City wide activities that build strong communities with neighbors working on events such as: Earth Day, National Night Out, Daffodil Days, etc.
- Work with City of Oakland staff and community to support the Foothill streetscape project.
- Continue working with the new merchants committee and different strategies to address the blight issues.

### **4. An Estimate of the Cost of Providing the Improvements and the Activities for Fiscal Year 2010-11**

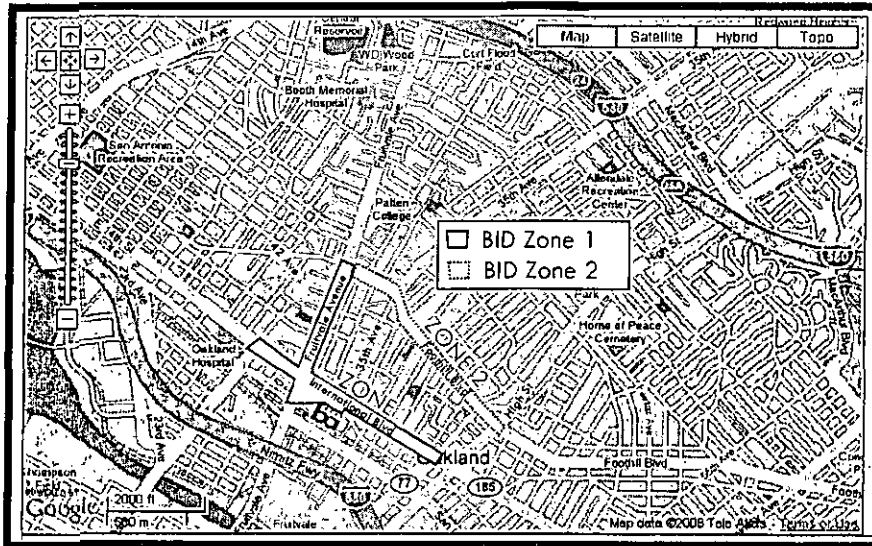
Please see attached budget.

### **5. Method and Basis of Levying the Assessment**

Each property owner pays an assessment based on gross lot square footage. The district is divided into two zones.

**Zone One** includes Fruitvale Avenue from Foothill Boulevard to East 12<sup>th</sup> Street (excluding 1500 to 1900 Fruitvale), Foothill Boulevard from Fruitvale Avenue to 34<sup>th</sup> Avenue, International Boulevard from Fruitvale Avenue to 42<sup>nd</sup> Avenue, and East 12<sup>th</sup> Street from 33<sup>rd</sup> Avenue to 35<sup>th</sup> Avenue.

The remainder of the district comprises **Zone Two**. Zone One parcels are assessed at \$0.17 per square foot and Zone Two properties are assessed at \$0.08 per square foot. Properties owned by charitable tax-exempt organizations pay \$0.08 per square foot in both zones. Residential properties with four units or fewer are not assessed in either zone.



#### 6. Surplus or Deficit for Fiscal Year 2010-11

The budget for Fiscal Year 2010-11 is \$324,713. The expected assessment to be collected for that year is \$324,713. Therefore, it is expected that there will be no surplus however; the services provided in the BID have been subsidized by the Unity Council. The Unity Council will seek additional funding to provide services to the business and property owners. Please see the attached financial report for 2010 and budget for 2011.

#### 7. Contributions from Sources Other than Assessments

We project that we will be able to supplement BID services through funding sources including the following:

- Local Initiatives Support Corporation: \$10,000 (secured)
- Coliseum Neighborhood Project Initiative Program \$23,672 banners project (secured)

**THE UNITY COUNCIL**  
**FRUITVALE BID SUPPORT SERVICES**  
**BUDGET REPORT**  
as of **AUGUST 31, 2010**

**REPORTING PERIOD: 01/01/10 - 07/31/10, with annual projections through 12/31/11**

<u>Budget Line Item</u>	<u>Fruitvale BID Contract Budget-2010</u>	<u>Actual Expenditures YTD 7/31/10</u>	<u>Bgt %</u>	<u>Projected Expenditures 2011</u>	<u>Bgt %</u>
<b><u>PERSONNEL</u></b>					
Lead Ambassador (Maria Sanchez)	\$ 40,000	\$ 23,333		\$ 40,000	
AmeriCorps	3,916	-		3,916	
<b>Subtotal</b>	<u>43,916</u>	<u>23,333</u>		<u>43,916</u>	
Taxes/Benefits	10,227	2,288		10,227	
<b>TOTAL PERSONNEL COSTS</b>	<u>54,143</u>	<u>25,621</u>	47%	<u>54,143</u>	100%
<b><u>CONTRACT SERVICES</u></b>					
Cleaning (PSC)	214,508	107,647		214,508	
<b>TOTAL CONTRACT SERVICES</b>	<u>214,508</u>	<u>107,647</u>	50%	<u>214,508</u>	100%
<b><u>OPERATING/MARKETING EXPENSES</u></b>					
Marketing/Operating Expenses	7,500	1,704		7,500	
Administration	25,832	15,068		25,832	
<b>TOTAL MARKETING/OPERATING EXPENSES</b>	<u>33,332</u>	<u>16,772</u>	50%	<u>33,332</u>	100%
<b><u>LOAN REPAYMENT &amp; CONTINGENCY</u></b>					
City of Oakland	6,000	6,000	100%	6,000	100%
Alameda County Collection Fee	5,520	-		-	
Contingency for Uncollectible Assessments	11,210	-		-	
	<u>22,730</u>	<u>6,000</u>	26%	<u>22,730</u>	100%
<b>GRAND TOTAL</b>	<u>\$ 324,713</u>	<u>\$ 156,040</u>		<u>\$ 324,713</u>	100%

- (1) Under the new Fruitvale BID contract, the City of Oakland requires \$22,730 of total proceeds to be set aside for "contingency" to be used for servicing the loan provided by the City to establish the BID, to pay fees charged by the County for collecting the BID assessments, and to create a reserve to mitigate the impact of uncollectible assessments.

# KOREATOWN NORTHGATE COMMUNITY BENEFIT DISTRICT

2633 TELEGRAPH AVE. #107  
OAKLAND CA 94612

## KOREATOWN-NORTHGATE COMMUNITY BENEFIT DISTRICT ANNUAL REPORT TO THE CITY COUNCIL – 2010

1. Proposed Changes in the Boundaries of the CBD or in any Benefit Zones within the District: There are no proposed changes in the boundaries of the KoreaTown-Northgate CBD for the coming year. There is only one benefit zone in the existing district.
  
2. Improvements and Activities Provided During Calendar Year 2010:
  - Galvanized efforts to mitigate concerns of a Parolee Day Reporting Center to move into the district. The Planning Commission approved project, spearheaded by the Mayor's office.
  - Inventoried and posted vacancies (37%) on the website looking towards development of a business recruitment strategy.
  - Created a neighborhood profile for business attraction purposes.
  - Maintained website [www.koreatownnorthgate.org](http://www.koreatownnorthgate.org); added presence on Facebook.
  - Created printed business directory and posted it online.
  - Collaborated with the organizers of the First Friday Art Murmur event providing monetary support to ensure a safe and pleasant event is preserved.
  - Advocate for the district through participation on the Oakland Merchants Leadership Forum and the Oakland Business Improvement District Council.
  - Instituted a full services, 5 day per week security team/outside contracted service to improve the safety of the neighborhood (August 2010);
  - Continued with outside contracted services maintenance including sidewalk sweeping, steam cleaning, landscaping and graffiti removal throughout the district;
  - Held the 3<sup>rd</sup> annual "Culture Fest" on May 14<sup>th</sup>, drawing thousands of visitors to the area;
  - Hired the first three quarter time CBD Executive Director, Shari Godinez, after a search, in February 2011;
  - Hired a Board consultant, New City America, to oversee and provide guidance to the Board and ensure compliance with the management district plan and with the annual budget. This service was paid for out of carry forward revenues (February 2011);

- Created a series of new policies for the Board including a “hardship policy and application” as well as a decision making and committee structure policy to guide the activities of the Board;
- Re-evaluated the proposed carry forward funds to ensure that the Board would maximize the surplus funds in the coming years;
- Began the process of rebuilding the Board of Directors by bringing in new members and mandating that they work in a Standing Committee of the Board;
- Re-evaluated the services levels and costs of the major services providers (Security and maintenance) to ensure that they are within budget by the end of calendar year **2011**;

**3. Activities planned for FY 2011:**

- The Board has adopted a new Committee structure to make the activities of the district more easily achievable and easy to implement. The Board adopted a four level Committee structure including:
  - a. **Organization/Executive Committee:** To oversee the finances, Board affairs, relations with the City and overall compliance issues;
  - b. **Security and Operations Committee:** To oversee the “clean and safe” functions of the district;
  - c. **Marketing and Identity:** to help brand the district so the name association is more positive, allowing us to attract new development and business to the area;
  - d. **Land Use:** Which will deal with review of new development, parking and transportation

Committee Chairs have been selected for each Committee and they have begun to meet and function;

- The Board will continue to work on the goal of ensuring that each special event is self-supporting and in fact will eventually generate non-assessment district revenue for the Association;
- The Board is looking at creating uniformity among its maintenance crew and security team, to ensure that they are branded correctly and easily visible to the general public and local businesses, residents and property owners;
- The Board has voted to enter into a “disbursement agreement” with the City as compared to a “contract for services” due to greater flexibility given to the Management Corporation for this function;
- The Security and Operations Committee is investigating the costs and implementation of a new outdoor pilot camera system for the district;
- The Security and Operations Committee will continue its involvement with the Neighborhood Crime Prevention Council;

- The Marketing and Identity Committee Obtained a \$47,500 NPI grant to plant trees on Telegraph between 27<sup>th</sup> and 34<sup>th</sup>; CBD will provide the funding to plant trees from 20<sup>th</sup> to 34<sup>th</sup> and we will look at the cost of installing between 50 – 100 new trees in the district and determine how they will be maintained for at least 3 years;
- The Marketing and Identity Committee will look into the costs of permanent markers that clearly identify the district to visitors;
- The Marketing and identity Committee will continue to work with the Art Murmur and see if it can grow and expand in the coming year;
- The Organization Committee will continue to produce a regular newsletter;
- The Organization Committee will come up with a new long term strategy for use of any pre-2010 assessment district revenues to enhance the district;
- The Organization Committee will review its bylaws and make recommendations to the Board for changes;
- The Board will continue to work with other BIDs and CBDs in the City to help shape more district friendly policies in the City;
- The Board will soon weigh in on the concept of mobile food trucks and submit its recommendations to the City;

4. Estimated Cost of Providing the Improvement and Activities for 2011:

See attached budget.

5. Method and Basis for Levying the Assessment:

Budget: The upcoming year annual budget is projected to be \$278,460.00, minus a small amount built in for uncollected assessments. The actual budget, averaged over five years should be \$ 257,339 for FY 2012.

BENEFIT ZONE	LINEAR FRONTAGE FIRST YEAR ANNUAL COSTS	LOT.SQUARE FOOTAGE FIRST YEAR ANNUAL COSTS	BUILDING SQUARE FOOTAGE FIRST YEAR ANNUAL COSTS*	SINGLE FAMILY RESIDENTS ANNUAL COST, PER PARCEL**
1	\$5.00	\$0.10	A-\$0.12 B-\$0.08 C-\$0.05 D-\$0.00 E-\$0.00 F-\$0.05	\$ 365.00

<i>BENEFIT ZONE</i>	<i>LINEAR FRONTAGE TOTAL</i>	<i>LOT SQUARE FOOTAGE TOTAL</i>	<i>BUILDING SQUARE FOOTAGE TOTAL</i>	<i>SINGLE FAMILY RESIDENTS - NUMBER OF UNITS</i>
1	16,146 linear feet	1,272,305 sq. ft.	787,556 sq. ft.	47 existing

*AMOUNT GENERATED BY PROPERTY VARIABLE AND BENEFIT ZONE FOR  
THE KOREATOWN/NORTH GATE COMMUNITY BENEFIT DISTRICT:*

<i>BENEFIT ZONE</i>	<i>LINEAR FRONTAGE TOTAL</i>	<i>LOT SQUARE FOOTAGE TOTAL</i>	<i>BUILDING SQUARE FOOTAGE TOTAL *</i>	<i>SINGLE FAMILY UNIT CONTRIBUTION,**</i>
1	\$80,730.00	\$127,230.00	\$ 53,345.00	\$17,155.00

\*Buildings or land use will be assessed based upon the impact those land uses have on the public rights of way. All parcels will be assessed equally on the basis of linear frontage and lot size, however the land use or building will determine the amount that parcel is assessed in total, in other words, buildings will be assessed differently based upon their anticipated benefit from establishment of the CBD.

Building categories A and B are anticipated to receive greater benefit from walk in traffic, resulting from attracting new residents and visitors to the district. Property owners of A and B category buildings will, therefore, generate greater benefit due to increased sales and greater commercial activity.

\*\*Only 47 single family residents/condos currently exist in the district. It is anticipated that there will be hundreds more built and parceled over the next five years. Once single family residents/condos have been parceled in the future mixed-use developments, a \$ 365.00 annual flat condo fee will be apportioned to underwrite and increase the SOBO portion of the budget to provide those new residents with seven day per week cleaning services, public rights of way beautification and possible supplemental security.



**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, retail condos
B	Office and Commercial uses, office or commercial condos, 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 Residential
G	Single Family residential/Condo units - \$ 365.00 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. Retail or commercial condos will be assessed as category "A" or "B" building use, and will use all three property variables (lot size, linear frontage and building use) factored in their assessments.

**AMOUNT OF BUILDING SQUARE FOOTAGE BY USE IN THE PROPOSED KOREATOWN/NORTH GATE CBD:**

<b>BUILDING TYPE B</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>	<b>E</b>	<b>F</b>	<b>G</b>
<b>BUILDING SQUARE FOOTAGE/DATABASE</b>	195,881	211,725	7,098			250,932	47

**EXPLANATION OF HIGHER ASSESSMENTS BASED UPON BUILDING USE:**

Single family residential units/condos, will be assessed a flat annual assessment, regardless of floor level or size of unit. Commercial or retail condos will be assessed on the same multi-variable basis as other parcels in the district.

Retail land uses, - restaurants, bars, coffee shops, liquor stores, drug stores, nail salons, etc. - or those land uses that benefit from increased walk-in traffic, will pay a higher annual assessment per square foot of retail building space, when compared to office, commercial, industrial or multi-family land uses. Only retail and visitor related land uses would be assessed for the marketing and promotions aspects of the CBD budget. Building square footage assessments for development projects would be adjusted during the demolition and construction phases.

6. **Surplus or Deficit for 2011:**

As of the beginning of the district fiscal year commencing January 1<sup>st</sup> 2011, the actual surplus and carry forward funds were \$185,834.

Please see the report produced by New City America and presented to the Board at its June 2011 meeting for further clarification on use of projected surplus.

**Attachments:**

**Budget for 2011**

**NCA report for budget adjustments, June 8<sup>th</sup> 2011**

<b>PROPOSED 2011 KOREATOWN OAKLAND CBD BUDGET</b>		<b>Amount</b>
Anticipated 2011 CBD Assessments		\$ 278,460
2010 carryover		
Less 10%: Delinquencies/County Fees/City loan payback		\$ 27,846
<b>AVAILABLE BID ASSESSMENTS</b>		<b>\$ 250,614</b>
<b>PUBLIC RIGHTS OF WAY AND SIDEWALK OPERATIONS</b>		
Graffiti Removal		\$ 8,000
Sidewalk Sweeping		\$ 30,000
Landscaping/Tree Maintenance		\$ 9,000
Steam Cleaning		\$ 8,000
Security-Security First Ambassadors		\$ 75,000
One Time Projects		\$ 22,000
PROWSO Staffing		\$ 15,000
		<b>\$ 167,000</b>
		<b>\$ 167,000</b>
<b>MARKETING AND IDENTITY ENHANCEMENT</b>		
Special events		\$ 11,500
Art Murmur		\$ 6,000
Web site		\$ 2,000
Design work, logo development, district branding		\$ 3,000
Communications, brochures, directories, newsletter		\$ 5,000
		<b>\$ 27,500</b>
		<b>\$ 27,500</b>
<b>ADMINISTRATION</b>		
Administrative staffing		\$ 35,000
Rent and utilities		\$ 4,600
Insurance		\$ 3,000
Phone/E-mail Service		\$ 2,500
Office Supplies		\$ 2,500
Attorney Fees		\$ 3,000
Accounting		\$ 3,000
Meals and entertainment		\$ 2,400
		<b>\$ 56,000</b>
		<b>\$ 56,000</b>
<b>Subtotal</b>	<b>\$0</b>	<b>\$ 250,500</b>
<b>Total 2011 Budget</b>		<b>\$ 250,500</b>
<b>Net Surplus</b>		<b>\$ 114</b>



RECOMMENDATIONS FOR CONSIDERATION BY KOREATOWN/NORTHGATE BOARD OF DIRECTORS  
 JUNE 8<sup>TH</sup>, 2011 BOARD OF DIRECTORS MEETING

**BACKGROUND:**

1. Original calculation for *carry forward* as of January 2011 was \$298,000, actually was \$185,834
2. How to reorganize shortfall and carry forward to *maximize special benefit services* in 2011.

<i>Budget Item Allocation for 2011</i>	<i>2011 Base budget</i>	<i>2011 supplemented budget from carry forward</i>	<i>Amount of supplement expended thus far</i>	<i>Amount of supplement projected for rest of 2011</i>	<i>Reduction to supplement or carry forward (January 2011)</i>	<i>Balance</i>
						\$ 185,834
Staffing	\$ 50,000	\$ 10,000	na	\$10,000	- \$ 10,000	\$ 175,834
Culture Fest	\$ 11,500	\$15,000	\$ 15,000	\$ 15,000	- \$ 15,000	\$ 160,834
Security	\$ 75,000	?	\$ 58,650 thus far as of 5/11/11, average of \$14,662 per month, (\$175,944 for '11)	\$ 100,000 (set in Jan.)	- \$ 100,000	?
Maintenance	\$ 55,000	?	\$ 23,994 as of 5/11/11 average of \$ 5,986 per month (\$71,832 for year)	\$ 10,000	- \$ 10,000	?
One time projects (NCA)	\$22,000	\$20,000		\$ 20,000 for	- \$22,000 (NCA contract is \$42,500)	\$ 140,834
Carry Forward balance to 2012						\$ 140,834



Recommendations for changes:

1. End NCA contract in December 31<sup>st</sup>, 2011;
2. Lower monthly allocation for sidewalk sweeping/graffiti/landscaping/etc to \$4,000 per month commencing July 1<sup>st</sup>, 2011. If you do this, Board will be able to keep maintenance at \$55,000 for 2011 and not dip into the reserve;
3. Lower monthly allocation for security to "x" per month, commencing July 1<sup>st</sup>, 2011;
  - a. If monthly allocations continue, (rate of January – April), \$ 100,944 will be used from reserve
  - b. if reduced to \$10k per month, as of July 1<sup>st</sup>, will use \$72,972 from reserve.
  - c. If reduced to 9 k per month as of July 1<sup>st</sup>, will use \$ 66,972 from reserve.
4. Determine costs of tree maintenance for 2012 prior to the installation;
5. Ensure that Culture Fest pays for itself in 2012;

Estimated cost savings from above for 2011:

Maintenance: \$ 12,000 for balance of 2011;

Security: \$ x for 2011;

Estimated carry forward into 2012 based upon projected revenues for FY 2011 and 2010 carry forward: if maintenance goes to 4 k per month as of July 1<sup>st</sup>, carry forward will range from \$ 73,862 – \$ 39,890 carry forward

Estimated collected assessments: (December 2010, April 2011 and August 2011)

December transfer (50%) \$ 139,721.00

April transfer (40%) \$ 105,907.00

Anticipated August transfer (10%) \$ 27,292.00

Total anticipated assessments for 2011: \$ 272,920 (98% compliance), this is \$23,000 above original budget project in January 2011

Total anticipated assessments for 2012 plus 2011 carry forward: \$ 257,339 (average over 4 years) plus whatever Board determines should be the carry forward

**Downtown Oakland Community Benefit District and the Lake Merritt/Uptown  
Community Benefit District**  
388 19<sup>th</sup> Street, Oakland, CA 94612  
510-452-4530 or 510-238-1122

**Downtown Oakland CBD and Lake Merritt/Uptown CBD Annual Report to the City Council  
Report on the Plan for 2010**

1. Proposed Changes in boundaries of the CBDs.

There are no proposed changes to the boundaries of the CBD. There will be some probably by the end of December 2010. However, the Fox theatre and a few other larger parcels on the periphery of both Downtown Oakland and Lake Merritt may be included and no formal action will be taken until we know the status of these potential additions to the two districts.

2. Sidewalk Operations Improvements and activities provided during fiscal year 2010:

The Sidewalk Operations Beautification and Order (SOBO) Committee is the key Committee of both organizations. It is the clearinghouse for the critical services which intend to bring order to the district and clean the public rights of way. Martin Ward of Old Oakland and Laurie Berberich of the 1000 Broadway building were selected to Co-Chair the Downtown Oakland CBD SOBO Committee. Michelle Lane of the Cathedral and Tanicia Jackson of Swig/Kaiser Center were selected to Co-Chair the Lake Merritt/Uptown District SOBO Committee. They continue to Chair this Committee. The key element of the work of this Committee is summarized as follows:

a. Ambassadors/Security: After a nationwide search conducted in early 2009, the Joint SOBO Committee recommended that Block by Block, a company that specializes in business district ambassador programs be selected to run this service. Block by Block receives approximately \$65,000 per month from both organizations and is operated under the supervision of Ted Tarver, their on-site supervisor, working out of the CBD offices. The contract runs from January thru December 2010. The Ambassador program is uniformed specifically for each district and their work has done more to turn around the image and order of the two districts, more than any single program in decades. It is perhaps the greatest success story of the two districts thus far;

b. Outreach with other security firms: One of the reasons why Block by Block was hired was due to their experience in working with many private security firms. There are private security firms throughout the district, but many of them do not talk to each other. Ted Tarver has been making his rounds getting to meet all of the security reps and we hope to have them all locked into an e-mail and/or fax database by the end of the summer. This will facilitate information on relevant problem areas in the two districts.

c. Cleaning Services: The Joint SOBO Committee hired a local non-profit, Peralta Services Corporation, based in Fruitvale, to operate the sidewalk cleaning services. Peralta employees are uniformed in the colors of each district and provide daily sidewalk sweeping and regular steam cleaning services in both districts. Peralta's contract was extended in 2010 and will expire at the end of the calendar year.

d. Hospitality: The Bank of America Foundation awarded the two districts a matching grant for fund "hospitality ambassadors" to be trained and overseen by Block by Block. The Hospitality ambassadors got underway in late August and will be providing visitors to the area with information on the district. The total grant from B of A is \$20,000, matched by the each district for a total funding of \$40,000 for this year.

e. Meserhle Verdict: When the Meserhle verdict was read in early July, Block by Block had been working closely with OPD to ensure that rioting did not affect the district. Unfortunately, and despite the best efforts of Ted Tarver's team, the rioting was not restricted to the City Hall plaza and substantial damage was done to many of the member businesses and property owners of the districts. Ted Tarver is now coordinating with other security companies for private property owners and working with the City Attorney's office, OPD and the District Attorney's office to ensure that there is not a repeat of the rioting when the final sentencing is read in early November.

3. Administration for 2010: Since early 2009, New City America, Inc. has administered both districts and has six employees who manage various duties for both CBD's. They have worked on the following: annual elections of the Board of Directors, setting up the non-profit corporations, setting up committee meetings, work with the City of Oakland on contracts and reporting, liaison to other community groups, monthly financial reports, setting up Board policies, setting up the office, quarterly newsletters, management of a property-owner database, Board meetings, overseeing the subcontractors and marketing and promotion of both districts. This year, Steve Snider, Andrew Jones, Tori Decker and others are working as a sub-contractor as Oakland Venue Management to New City America. The two district management corporations thus continue to have no employees and contract out ALL service providing services to the property owners.

4. District Identity and Streetscape Improvement Special Benefit Services for 2010: As per the Management District Plan and based upon unspent DISI funds in the previous calendar year, approximately \$ 207,585 was allocated for DISI related activities for both districts in 2010. The following represents the work of the Joint DISI Committee: Public space development, advertising, special events, branding, advertising and public relations handled by Gallen Neilly. The Chairs are Carmen Santisteban (CBRE-City Center)/Downtown Oakland and Andrea Kirkpatrick (Kaiser Center-Swig)/Lake Merritt-Uptown District. Please see attached budget.

5. Estimated cost for providing services in the coming fiscal year - 2011:  
The next fiscal year budget (2010) for both districts are as follows:

Downtown Oakland CBD:	\$ 934,241
Lake Merritt/Uptown CBD:	\$ 1,111,123.00

6. Method and Basis of Levying the Assessments:

The method and basis for levying the assessment is based upon a benefit unit analysis. In this process, linear frontage, lot size and building square footage data is used to calculate individual parcel assessments. In addition, two benefit zones are used in the Downtown Oakland CBD to apportion special benefit services based upon need.

7. Surplus or Deficit for Fiscal Year 2009/10:

There was a \$282,498 carry forward for Lake Merritt's CBD and a \$190,745 carry forward for Downtown Oakland's CBD for the beginning of 2010. The carry forward was based upon cost savings and the rolling out of security and maintenance services which were delayed by 2 – 3 months in early 2009. It is anticipated that there will be lower carry forward amounts for fiscal year 2011.

8. Contributions from other sources:

The Lake Merritt/Uptown District Association and Downtown Oakland CBDs were the recipient of a grant from the Bank of America Foundation, totaling \$20,000 for the Hospitality Ambassador program. This grant was awarded in July. Other grants are anticipated for the balance of this year and into 2011.

Anticipated new projects in the coming year:

The following special benefits will need to be prioritized with existing staff and within the existing budget over the next year or two:

- *Business attraction strategies:* Strategies, particularly attraction of new office tenants and possibly new hotels should be prioritized in the districts. Staff must come up with a strategy to deal with this since office tenants are the life blood of the success of our major stakeholders;
- *Redesign of 17<sup>th</sup> Street BART Station:* With the support of Councilwoman Kaplan and CEDA Director Walter Cohen, staff is highly motivated to help transform the 17<sup>th</sup> Street BART station into a beautiful entry way into the two districts. Since the 17<sup>th</sup> Street Station is located at the exact border of both districts, both have to gain a lot from this makeover. The use of lighting, landscaping and public art can make this a great entry way to the Fox and Paramount Theatres as well as the Uptown district.
- *Partnering with Youth Radio:* Youth Radio, which has a national contract with NPF, is located at 17<sup>th</sup> and Broadway and provides an excellent resource for both districts in the promotion and district identity efforts of the districts. The technical knowledge and facilities for filming and broadcasting in these studios is truly state of the art and the districts should prioritize working with this nationally recognized asset.
- *Repairing public amenities:* Nothing states that a district is on the decline more than faded signage, graffiti and non-functioning amenities in the public rights of way. Currently the "handless" art deco sidewalk clock at 17<sup>th</sup> and Broadway and the dead horse trough which should work as a fountain at Telegraph and Broadway, are great examples of great public



amenities that should be brought back to life. It is amenities such as these that create a real urban experience and the two CBDs should work with the City to get them both back on line.

- *Landscaping medians throughout the districts:* Broadway, W. Grand and 20<sup>th</sup> Street/Lakeside Drive have great medians that are currently filled with gravel or bark. The planting and maintaining of these medians in the coming years would do so much to enhance the visual improvements to this area. Flowers and landscaping are very inexpensive ways to improve and re-cast the image of any area. Eventually, a hanging plant program from 8<sup>th</sup> to 25<sup>th</sup> along Broadway, as well as 20<sup>th</sup> and W. Grand could also do much to improve the image of the area.
- *Downtown Zoning Update:* The Downtown Specific Plan is in the process of review and adoption. Land use entitlements are key to the success of this area, particularly when the development cycle returns. Both CBDs must be active in the review and influence of these entitlement policies;
- *Public Space Development:* The DISI Committee will be working on areas including Franklin Bend, Franklin Square, Snow Park, Latham Square, the 13<sup>th</sup> Street corridor and 9<sup>th</sup> Street for new public space development. This will become a priority in 2011 – 2012.
- *Broadway Shuttle Review:* The Land Use Committee will be looking at multiple transportation related activities including the new Broadway shuttle and the conceptual plan for a Broadway Streetcar.
- *New developments:* As new development begins to occur in both districts, the Land Use Committee will begin to review these projects and make recommendations on the how the new developments or rehabilitated buildings will fit within the districts.



**Downtown Oakland Community Benefit District  
Annual Report to the City of Oakland  
2010-11**

**Date:** September 15, 2010

**Name of District:** Downtown Oakland Association

**Contact Person Name/Phone/E-mail Address:**

Marco Li Mandri, 510-238-1122,  
marco@downtownoakland.org

<b>Board Member Names, Position Held (i.e. President, Treasurer, etc.) and Date When Each Member's Term Expires</b>	1. JC Wallace, President, October 2011
	2. Chris Curtis, Vice President, October 2011
	3. John Bruno, Secretary, October 2011
	4. Laurie Berberich, Treasurer, October 2011
	See attached for roster and term lengths
<b>Number of Vacant Seat(s) on the Board</b>	Zero
<b>Board Member Qualifications (i.e. indicate whether a property-owner, resident, business owner, etc. If a business-owner, then indicate the name of the business owned)</b>	Please see attached roster for categories of Board seats
<b>Length of Board Member Terms</b>	Staggered terms, two year terms as of October 2010
<b>Board Member Appointment Process</b>	The Secretary writes a letter to all property owners soliciting that they nominate themselves or others for a property owners seat (at least 2/3), or a business tenant and community at large seat. The nominations

**DOWNTOWN OAKLAND ASSOCIATION**

388 19th Street • Oakland, California 94612

Phone 510.238.1122 • Fax 510.452.4529 • mail@downtownoakland.org • www.downtownoakland.org

	are due at least 2 weeks prior to the Annual meeting . The annual meeting for this year has been called for October 6 <sup>th</sup> at 1:00 p.m. at 500 12 <sup>th</sup> Street, Conference Room 102.
<b>Summary of CBD Functions</b>	See Management District Plan budget attached.
<b>Nome of Sub-committees/Chairs</b>	1. <b>Organization Committee/</b> JC Wallace
	2. <b>Sidewalk, Operations, Beautification and Order/Laurie Berberich, Martin Ward</b>
	3. <b>District Identity and Streetscape Improvements/</b> Carmen Santisteban
	4. <b>Land Use/Charie Leonard</b>



## Board Nominees Elected to the Downtown Oakland Association Board of Directors - August 2010

Person Elected	Property Representing	Proposed Term
1. JC Wallace or Tom Tewksbury as an alternate	SKS Investments (President)	2 Year
2. Charlie Leonard or Don Rogers as an alternate	CIM Group	2 Year
3. Laurie Berberich	1000 Broadway (Treasurer)	2 Year
4. Ming Lee	CBRE Properties	2 Year
5. Chris Curtis	Metrovation (Vice President)	2 Year
6. Carmen Santisteban	City Center/CBRE	1 Year
7. Martin Ward	Old Oakland Assoc.	2 Year
8. Alizo Gallo	City of Oakland	1 Year
9. Beverly Rivas	Press Building	2 Year
10. Mike McGuire	Calif Capital	1 Year
11. Denise Trudeau	Clorox	2 Year
12. Andrew Brog	Cathedral Bldg.	1 Year
13. John Bruno or Melissa Chau as an alternate	Marriott/CIM (Secretary)	1 Year
14. Julia Sherman or Mike Haddad as an Alternate	Property Owner	1 Year
15. Ke Norman, Business Owner	Nailphoria	1 Year
16. Scott Stafford	Community at Lorge	1 year
18. Anagha Dandekar Clifford	Business Tenant	1 year
19. Michelle Lane	Old Oakland Associates	1 year

DOWNTOWN OAKLAND ASSOCIATION

388 19th Street • Oakland, California 94612



## Downtown Oakland Association Committee Structure - 2010

DOA Committee or Task Force	Functions and Duties
<p><b>Organization/Executive Committee</b></p> <p>Chair: The President of the Corporation and all of the Officers</p> <p><b>JC Wallace, Chair</b></p>	<p>Oversees staff and contracts, corporate finances, insurance, grants, development of budget, Board agendas and meetings, correspondences, outreach, bylaws and policies, public relations, newsletter, relations with other CBDs, political reps and public agencies, Board elections, policy formation, fundraising, etc. Consists of all of the officers of the corporation.</p>
<p><b>SOBO</b> (Sidewalk Operations, Beautification and Order Committee)</p> <p><b>Martin Ward and Laurie Beberich as Co-Chairs</b></p>	<p>Oversees service provider or employees involved in the maintenance and improvement of the public rights of way, including sidewalk sweeping; steam cleaning, landscaping, private security, personnel and non-personnel expenses.</p> <p>Relations with OPD, BART, ATC</p>
<p><b>DISI Committee</b> (District Identify and Streetscape Improvements)</p> <p><b>Carmen Santisteban, Chair</b></p>	<p>Projects would include those that markets and promotes the district or promotes positive aspects of the Downtown Oakland District.</p> <p>Those issues may include: branding of the district, development of a new logo, special events, Website development and maintenance, beautification programs, banner program, streetscape issues including landscaping design, bus shelters, festival poles, holiday decorations, visual linkages, new public spaces projects, improvements to Snow Park.</p>
<p><b>Land Use Committee</b></p> <p><b>Charlie Leonard, Chair</b></p>	<p>Planning, zoning, parking, parking meter revenues, parking enforcement, shuttle, transportation, mixed use developments, FARs, Community Plan, Review of new construction and its impact, street relationship.</p>

### DOWNTOWN OAKLAND ASSOCIATION

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### Organization Committee Budget Analysis, 2010

2009 Gross Budget	2009 Collected 8/31/09	2009 Delinquency Rate	2010 Gross Budget, projected	2010 Gross budget at 94%	% 2009 Org Budget (Admin)	% Proposed Org 2010
\$ 902,793	\$ 805,808* (with X, \$ 860,808	11% 5% w X	\$ 934,241	\$ 878,186	17.9% or \$152,000	18% or \$ 160,000.00

### SOBO Budget Analysis, DOCBD 2010

2009 Gross Budget	2009 Collected 8/31/09	2009 Delinquency Rate	2010 Gross Budget, projected	2010 Gross budget at 94%	SOBO 2009 %	Proposed SOBO 2010 %
\$ 902,793	\$ 805,808* (with X, \$ 860,808	11% 5% w X	\$ 934,241	\$ 878,186	58.3% - \$ 495,000	66% - \$ 579,603

### DISI Budget Analysis, DOCBD 2010

2009 Gross Budget	2009 Collected 8/31/09	2009 Delinquency Rate	2010 Gross Budget, projected	2010 Gross budget at 94%	DISI 2009 %	Proposed DISI 2010 %
\$ 902,793	\$ 805,808* (with X, \$ 860,808	11% 5% w X	\$ 934,241	\$ 878,186	8.7% - \$74,000	8% - \$ 74,000

### DOWNTOWN OAKLAND ASSOCIATION

**Preliminary Budget by Category, 2010:**

Category of Special Benefit Service	Estimated Percentage – 2010	Estimated Amount 2010
SOBO	66%	\$ 579,603
DISI	8%	\$ 74,000
Administration, personnel and non personnel	18%	\$ 160,000
Contingency	6%	\$ 48,583
Shuffle Allocation	2%	\$ 16,000
<b>Total</b>	<b>100%</b>	<b>\$ 878,186</b>

Joint Administration Budget: 2010 (Personnel and Non-Personnel)

Personnel Contracts: \$ 270,000

Non-Personnel Expenses: \$ 50,000

Estimated @ \$25,000 (rent, utilities, phone/fax, web, etc.) per district. Current budget for each district is around \$31,000 for 2009. No need to outfit office with office furniture and computers in 2010.

**Downtown Oakland Association  
Profit & Loss Budget Performance  
August 2010**

*Zolo Budget*

	Curr. Actual	Current Budget	Curr. Variance	Percent	YTD Actual	YTD Budget	YTD Variance	Percent	Annual Budget	Variance Explanation
<b>INCOME</b>										
Earned revenues										
Assessment Revenue										
Prior Year Bal - Carry Forward	0.00	15,895.47	-15,895.47	0.0%	0.00	127,183.80	-127,183.80	0.0%	190,745.86	Year-end 2009 Revenue not spent; carried forward
Assessment Revenue - Other	0.00	73,182.17	-73,182.17	0.0%	770,060.72	883,457.32	-113,396.60	131.53%	878,186.00	YTD collected assessments greater than YTD prorated budgeted amount
<b>Total Assessment Revenue</b>	<b>0.00</b>	<b>89,077.64</b>	<b>-89,077.64</b>	<b>0.0%</b>	<b>770,060.72</b>	<b>712,621.12</b>	<b>57,439.60</b>	<b>109.06%</b>	<b>1,068,931.86</b>	
<b>Total Earned revenues</b>	<b>0.00</b>	<b>89,077.64</b>	<b>-89,077.64</b>	<b>0.0%</b>	<b>770,060.72</b>	<b>712,621.12</b>	<b>57,439.60</b>	<b>108.08%</b>	<b>1,068,931.86</b>	
<b>TOTAL INCOME</b>	<b>0.00</b>	<b>89,077.64</b>	<b>-89,077.64</b>	<b>0.0%</b>	<b>770,060.72</b>	<b>712,621.12</b>	<b>57,439.60</b>	<b>108.05%</b>	<b>1,068,931.86</b>	
<b>EXPENSES</b>										
CONTINGENCY	0.00	9,181.05	-9,181.05	0.0%	10,704.75	73,448.50	-62,743.74	14.58%	110,172.70	Unallocated funds, general purposes
<b>DISTRICT IDENTITY (DISI)</b>										
Advertising										
Insert	0.00	833.33	-833.33	0.0%	0.00	8,888.68	-8,888.68	0.0%	10,000.00	Funds not spent
Advertising - Other	0.00				750.00					Licensing of 50 photos for marketing materials
<b>Total Advertising</b>	<b>0.00</b>	<b>833.33</b>	<b>-833.33</b>	<b>0.0%</b>	<b>750.00</b>	<b>8,888.68</b>	<b>-8,138.68</b>	<b>11.25%</b>	<b>10,000.00</b>	
Banner Program	0.00	833.33	-833.33	0.0%	500.00	6,888.68	-6,388.68	7.5%	10,000.00	Funds not spent; waiting for Bracket approval from City
Misc	0.00	800.00	-800.00	0.0%	2,158.52	6,400.00	-4,241.48	33.73%	9,600.00	Unallocated DISI funds
Public Relations	2,250.00	2,250.00	0.00	100.0%	15,750.00	18,000.00	-2,250.00	87.5%	27,000.00	Under-budget
Public Space Development	0.00	416.67	-416.67	0.0%	0.00	3,333.32	-3,333.32	0.0%	5,000.00	Funds not spent
Special Events										
Art & Soul	0.00	416.67	-416.67	0.0%	5,000.00	3,333.32	-1,666.68	150.0%	5,000.00	Annual budget of \$5000 expended, YTD is prorated
Downtown Event	0.00	833.34	-833.34	0.0%	0.00	6,888.64	-6,888.64	0.0%	10,000.00	Budgeted event not yet taken place
Holiday Parade	0.00	125.00	-125.00	0.0%	0.00	1,000.00	-1,000.00	0.0%	1,500.00	Budgeted event not yet taken place
Midtown Oakland Arts District	0.00	500.00	-500.00	0.0%	0.00	4,000.00	-4,000.00	0.0%	6,000.00	Budgeted event not yet taken place
Non-CDD Events	0.00				7,891.71					Great Wall, LMUDA event, expenses owed to DOA
Old Oakland Music Series	0.00	833.33	-833.33	0.0%	2,500.00	8,888.68	-6,388.68	37.5%	10,000.00	On-going series; within annual budget
Tree-Lighting	0.00	416.67	-416.67	0.0%	0.00	3,333.32	-3,333.32	0.0%	5,000.00	Budgeted event not yet taken place
WOBQ/Oaklavia	0.00	125.00	-125.00	0.0%	1,500.00	1,000.00	500.00	150.0%	1,500.00	Annual budget of \$1500 expended, YTD is prorated
<b>Total Special Events</b>	<b>0.00</b>	<b>3,250.01</b>	<b>-3,250.01</b>	<b>0.0%</b>	<b>16,091.71</b>	<b>25,899.86</b>	<b>-9,808.15</b>	<b>65.35%</b>	<b>39,000.00</b>	
Trash cans	0.00	708.33	-708.33	0.0%	0.00	5,888.68	-5,888.68	0.0%	8,500.00	Pending approval from City, implementation
Website	68.75	150.00	-81.25	45.83%	5,804.98	1,200.00	4,604.98	483.75%	1,800.00	5 vendors - website maint, domain management, network site subscription, 2 website design projects
<b>TOTAL (DISI)</b>	<b>2,318.75</b>	<b>9,241.67</b>	<b>-6,922.92</b>	<b>25.03%</b>	<b>41,855.21</b>	<b>73,933.32</b>	<b>-32,078.11</b>	<b>56.75%</b>	<b>110,900.00</b>	
<b>ORGANIZATION</b>										
<b>Non-Personnel Expenses</b>										
Computer Service & Support	0.00	41.87	-41.87	0.0%	150.00	333.32	-183.32	45.0%	500.00	As-needed, under budget
Fees & Permits	17.50	12.50	5.00	140.0%	1,050.00	100.00	950.00	1,050.0%	150.00	Includes California Downtown Association & International Downtown Association memberships \$1032.50 total
Insurance										
Directors & Officers	0.00	133.34	-133.34	0.0%	1,892.00	1,468.64	423.36	115.37%	2,200.00	Prorated monthly, within annual budget
General Liability	0.00	183.34	-183.34	0.0%	2,703.00	1,468.64	1,234.36	184.3%	2,200.00	Increase in annual premium, added office location & contents
<b>Total Insurance</b>	<b>0.00</b>	<b>316.68</b>	<b>-316.68</b>	<b>0.0%</b>	<b>4,595.00</b>	<b>2,937.28</b>	<b>1,657.72</b>	<b>149.53%</b>	<b>4,400.00</b>	
Legal & Accounting Expenses	0.00	166.67	-166.67	0.0%	2,012.00	1,333.32	678.68	150.8%	2,000.00	Over budget due to cost of first annual audit



**Downtown Oakland Association  
Profit & Loss Budget Performance  
August 2010**

	Curr. Actual	Current Budget	Cun. Variance	Percent	YTD Actual	YTD Budget	YTD Variance	Percent	Annual Budget	Variance Explanation
Misc	27.43	163.75	-135.32	18.75%	1,768.77	1,308.98	459.79	135.02%	1,994.93	Unallocated ORG funds
Occupancy expenses										
Rent, parking, other occupancy	126.00	1,209.33	-1,082.33	10.43%	3,079.50	8,888.88	-1,590.18	83.55%	14,500.00	Prorated monthly, within annual budget
<b>Total Occupancy expenses</b>	126.00	1,208.33	-1,082.33	10.43%	3,078.50	9,888.88	-1,590.18	83.55%	14,500.00	
Office furniture & equipment	0.00				788.37					Purchase of additional desk & computer, not budgeted
Postage, shipping, delivery	173.10	100.00	73.10	173.1%	605.36	800.00	-184.64	75.87%	1,200.00	Prorated monthly, within annual budget
Printing & copying	99.57	166.67	-67.10	59.74%	1,874.05	1,333.32	541.53	140.62%	2,000.00	Includes cost of metal plates for trash cans, 5774
Supplies	583.83	291.57	292.16	200.17%	2,106.55	2,333.32	-226.77	90.28%	3,500.00	Prorated monthly, within annual budget
Telephone & telecommunications	120.39	156.67	-48.28	72.23%	1,493.81	1,333.32	160.29	111.27%	2,000.00	Prorated monthly, within annual budget
<b>Total Non-Personnel Expense</b>	1,147.52	2,684.61	-1,538.79	42.78%	24,311.31	21,476.54	2,834.77	113.2%	32,214.98	
ORG/Special Projects										
Shuttle	0.00	1,333.34	-1,333.34	0.0%	998.05	10,888.84	-9,888.59	9.35%	16,000.00	Purchase of T-shirts, major costs not yet incurred
<b>Total ORG/Special Projects</b>	0.00	1,333.34	-1,333.34	0.0%	998.05	10,888.84	-9,888.59	9.38%	16,000.00	
Personnel & Related										
Staff Personnel	11,250.00	11,250.00	0.00	100.0%	80,000.00	80,000.00	0.00	100.0%	135,000.00	No Variance
<b>Total Personnel &amp; Related</b>	11,250.00	11,250.00	0.00	100.0%	80,000.00	80,000.00	0.00	100.0%	135,000.00	
<b>TOTAL ORGANIZATION</b>	12,397.62	15,257.95	-2,870.13	81.2%	115,303.38	122,143.18	-6,833.62	84.41%	183,214.93	
SOBO										
Beautification	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%	0.00	Waiting for approval from City
Maintenance	17,346.15	15,900.58	1,445.58	109.09%	134,822.07	141,288.88	-6,436.81	95.44%	204,861.00	Prorated monthly, within annual budget
Misc SOBO expenses	0.00	5,622.56	-5,622.56	0.0%	1,165.78	44,981.38	-43,825.57	2.57%	87,472.00	Incl. trash can encroach, permit, small tools, laser engraving
Security	38,315.58	30,124.75	3,191.83	127.19%	257,821.25	258,312.00	-490.71	99.08%	388,811.00	Prorated monthly, within annual budget
<b>Total SOBO</b>	55,662.74	51,547.99	4,014.75	107.77%	383,788.15	454,532.04	-60,792.89	88.54%	681,144.00	
<b>TOTAL EXPENSES</b>	70,379.31	85,338.86	-14,959.35	82.47%	581,788.48	724,677.04	-142,308.56	77.58%	1,065,431.63	
Net Ordinary Income	-70,379.31	3,738.96	-74,118.29	-0.82	208,292.24	11,455.92	219,748.18	1919.03%	3,500.00	
OTHER INCOME/EXPENSE										
Other Expense										
District Formation Costs										
Reimbursement to Stakeholders	0.00				3,500.00	3,500.00	0.00	100.0%	3,500.00	Replaced lost check from 2009
<b>Total District Formation Costs</b>	0.00				3,500.00	3,500.00	0.00	100.0%	3,500.00	
<b>TOTAL OTHER INCOME/EXPENSE</b>	0.00				3,500.00	3,500.00	0.00	100.0%	3,500.00	
<b>NET OTHER INCOME</b>	0.00				-3,500.00	-3,500.00	0.00	100.0%	-3,500.00	
<b>NET INCOME</b>	-70,379.31	3,738.96	-74,118.29	-1,882.31%	204,792.24	-14,985.92	219,748.18	-1,385.31%	0.00	

# Downtown Oakland District Summary - Option 2

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Estimated 2011

9/15/2010

## District Totals

Condo Total			Condo Total	\$0.00
Bldg SF Total	6,233,632	100%	Bldg SF Total	\$422,226.44
Lot Sz Total	1,394,247	100%	Lot Sz Total	\$191,750.79
Frontage Total	20,187	100%	Frontage Total	<u>\$320,264.39</u>
				\$934,241.62

# Management District Plan

SIDEWALK OPERATIONS, BEAUTIFICATION, ORDER:

\$ 552,000 62%

Examples of these special benefit services and costs include, but are not limited to:

- Private security over and above those services currently provided by the Oakland Police Department, BART Police, Alameda County Transit, and the Alameda County Sheriff's Department;
- Regular sidewalk and gutter sweeping
- Regular sidewalk steam cleaning
- Spot steam cleaning as necessary
- Beautification throughout the district
- Enhanced trash emptying
- Removal of bulky items as necessary
- Timely graffiti removal, within 24 hours as necessary
- Tree and vegetation maintenance
- Parking assistance
- Special events
- Planning of new outdoor public spaces
- Maintenance vehicle and equipment costs (if done in house)

**TABLE 4 - A**  
**SPECIAL BENEFIT SOBO SERVICES BROKEN DOWN BY FREQUENCY BY BENEFIT ZONE**

Special Benefit Category/Item - %	Number of employees/contractors	Benefit Zone 1 Frequency	Benefit Zone 2 Frequency	First Year Costs	
<b>SOBO - 62%</b>					
a. Private Security	2	6 days per week	6 days per week	\$ 192,000 (Funded by Lot Size)	
b. Sidewalk sweeping, graffiti removal, dog bog maintenance, steam cleaning.	see attached	6 days	5 days	\$ 320,000 (Funded by Linear Frontage based upon Benefit Zone frequencies. Includes services b-g)	
c. Regular trash removal	see attached	6 days	5 days		
d. Lawscaper and maintenance	see attached	6 days	5 days		
e. Banner installation and maintenance		Quarterly	Quarterly		
f. Supervision of SOBO Services		6 days	5 days		
g. Public rights of way consulting services		As needed	As needed		
h. General Liability and vehicle insurance. Vehicle and machinery, maintenance, materials, equipment and supplies, plant material					\$ 40,000 (Funded by Building Square footage costs from both Benefit Zones)
<b>Sub-total for SOBO</b>					<b>\$ 552,000</b>

Enhanced Residential Beautification/Security: (For Future Residential)

\$ 00.00      0%

Examples of these future special benefit services and costs include, but are not limited to:

- Enhanced beautification around blocks with predominantly single family residential unit parcel development. Such enhanced services would include regular security sweeps and evening monitoring, in addition to

installation of additional hanging plants, intensive sidewalk landscaping, extra trash cans, dog waste distribution boxes;

**DISTRICT IDENTITY:** \$ 90,000 10%

Examples of these special benefit services and costs include, but are not limited to:

- Web site development and updating;
- Special Events
- Holiday decorations
- Branding of Downtown
- Banner programs
- Public art displays
- Logo development
- Public space design and work
- Signage
- Seasonal ornamental plantings and other special projects around Frank Ogawa Plaza

**TABLE 4 – B**  
**SPECIAL BENEFIT DISTRICT IDENTITY SERVICES BROKEN DOWN BY COSTS PER BENEFIT ZONE**

Special Benefit Category/Item - %	Benefit Zone 1 Frequency	Benefit Zone 2 Frequency	First Year Costs
<b>District Identity – 10%</b>	<b>85% costs</b>	<b>15% costs</b>	
a. Web site;			(Funded entirely from Building Square footage assessments levied at two rates for Benefit Zones 1 and 2)
b. Special Events			
c. Holiday decorations;			
d. Branding;			
e. Banner program			
f. Public art			
g. Logo development			
h. Public space design work			
i. Signage			
j. Seasonal ornamental plantings and other special projects around Frank Ogawa Plaza			
k. Other			
	\$ 76,000	\$ 14,000	
<b>Sub-total DIST</b>			<b>\$ 90,000</b>

**Administration and Corporate Operations:** \$ 180,000 20%

Examples of these special benefit services and costs include, but are not limited to:

- o Staff and administrative costs
- o Insurance
- o Office related expenses, rent

- Financial reporting
- Accounting
- Legal work

Administrative services and costs are provided to, and apportioned equally among the building square footage of all of the parcels in the district.

CONTINGENCY/CITY AND COUNTY FEES/RESERVE: \$ 67,108 8%

Examples of these special benefit services and costs include, but are not limited to:

- Delinquencies
- City Fees
- County fees
- Reserves
- Special projects

Contingency/Reserve costs are apportioned equally among the building square footage of all of the parcels in the district

**TABLE 4 – C**  
**CATEGORIES OF SPECIAL BENEFIT SERVICES – FIRST YEAR**

PROGRAM OR ACTIVITY FUNDED BY THE DOWNTOWN OAKLAND COMMUNITY BENEFIT DISTRICT	APPROXIMATE % OF FIRST YEAR ANNUAL BUDGET	ESTIMATED ANNUAL COSTS
Sidewalk Operations, Beautification and Order	62%	\$ 552,000.00
District Identity and Signage	10%	\$ 90,000.00
Enhanced Residential Beautification and Evening Security (for future use when condos are built in the district)	0%	\$ 00.00
Administration/Corporate Operations	20%	\$ 180,000
Contingency/City and County Fees/Reserves	8%	\$ 67,108.00
<b>TOTAL</b>	<b>100%</b>	<b>\$ 889,108.00</b>

Reserve for Slow Payments:

A percent of the budget is held in reserve to offset delinquent and/or slow payment from both public and private properties.

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **AUG 12 2010**

DOWNTOWN OAKLAND ASSOCIATION  
2130 COLUMBIA ST  
SAN DIEGO, CA 92103

Employer Identification Number:  
35-2351022  
DLN:  
600147045  
Contact Person:  
ANGELA M BENDER ID# 31152  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
June 30  
Public Charity Status:  
170(b)(1)(A)(vi)  
Form 990 Required:  
Yes  
Effective Date of Exemption:  
December 12, 2008  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.


Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Letter 9-7 (00/CG)

DOWNTOWN OAKLAND ASSOCIATION

We have sent a copy of this letter to your representative as indicated in your power of attorney.

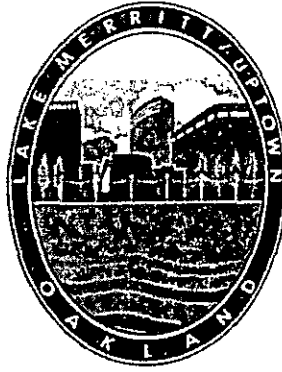
Sincerely,



Robert Choi  
Director, Exempt Organizations  
Rulings and Agreements

Enclosure: Publication 4221-PC





**Lake Merritt/Uptown District Association Annual Report to the  
City of Oakland  
September 2010**

**Date:** September 15, 2010

**Nome of District:** Lake Merritt/Uptown District Association

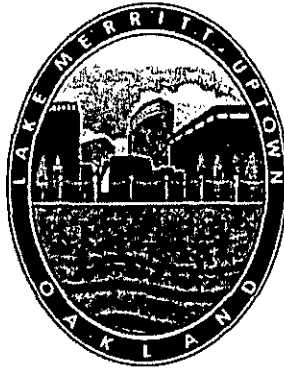
**Confact Person Nome/Phone/E-mail Address:**

Marco Li Mandri 510-452-4529.  
marco@lakemerritt-uplown.org

<b>Board Member Names, Position Held (i.e. President, Treasurer, etc.) and Date When Each Member's Term Expires</b>	1. Deborah Boyer, President, October 2011
	2. Chris Curtis, Vice President, Oct 2011
	3. Indrojit Obeysekere, Treasurer, Oct. 2011
	4. Robert Wilkens, Secretary, Oct. 2011
	Please see attached current roster of Board members and terms
<b>Number of Vacant Seat(s) on the Board</b>	Zero
<b>Board Member Qualifications (i.e. indicate whether a property-owner, resident, business owner, etc. If a business-owner, then indicate the name of the business owned)</b>	Please see attached roster of Board members
<b>Length of Board Member Terms</b>	Staggered terms, two year terms as of October 2010
<b>Board Member Appointment Process</b>	The Secretary writes a letter to all property owners soliciting that they nominate themselves or others for a property owners seat (at least 2/3), or a business tenant and community at large seat. The nominations

**LAKE MERRITT/ UPTOWN COMMUNITY BENEFIT DISTRICT**

	are due at least 2 weeks prior to the Annual meeting . The annual meeting for this year has been called for October 6 <sup>th</sup> at 1:00 p.m. at 500 12 <sup>th</sup> Street, Conference Room 102. The President calls a nominations meeting a notice is mailed out to all property owners soliciting director nominations. Nominations must be received by the President no later than 14 days before the applicable Annual Nominations meeting.
Summary of BID Functions	See attached management district plan
Name of Sub-committees	1. Organization Committee - JC Wallace/Chair
	2. District Identity-Andrea Kirkpatrick/Chair
	3. Sidewalk, Operations, Beautification and Order - Michelle Lone, Tanlcia Jackson/Co-Chairs
	4. Land Use - Indrojit Obeysekere, Chair



**Board Nominees Elected to the Lake Merritt/Uptown  
District Association Board of Directors - July 2010  
Terms for Board Members**

Person Elected	Property Representing	Proposed Term
1. Deborah Boyer	Swig/Kaiser Center (President)	2 Year
2. John Bruno or Melissa Chau	CIM Group	2 Year
3. Robert Wilkens	YMCA (Secretary)	2 Year
4. Indrojit Obeysekere	Kaiser Foundation (Treasurer)	2 Year
5. Chris Curtis	Metrovation (Vice President)	2 Year
6. Andrea Kirkpatrick with Tanicia Jackson as an alternate	Swig/Kaiser Center	1 Year
7. Mike Brown	Catholic Diocese	2 Year
8. Aliza Gallo	City of Oakland, and Redevelopment Agency	1 Year
9. Charlie Leonard or Nolo Montgomery	CIM Group	1 Year
10. CJ Hirschfield	Children's Fairyland	1 Year
11. Lorie Alemanio	Leamington	2 Year
12. Laurie Cooperman-Rosen	Metro Eslates	2 Year
13. Mike Huoco	Kaiser Foundation	1 Year
14. Mike Ghielmetti with Doug Park as an alternate	Signature Properties	2 Year
15. Steve Douglas	Douglas Parking	1 Year
16. Michelle Lone	Catholic Diocese	1 Year
17. Eileen Kong with Samantha Stires as an alternate	Beacon Properties	1 Year
18. Scott Stafford	Community At Large	1 Year

LAKE MERRITT/UPTOWN COMMUNITY BENEFIT DISTRICT

388 19th Street - Oakland, California 94612

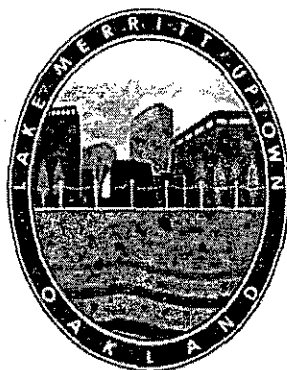


## Lake Merritt/Uptown Association Committee Structure – 2010

<b>LMUDA Committee or Task Force</b>	<b>Functions and Duties</b>
<b>Organization Committee</b>  Chair: The President of the Corporation and all of the Officers  <b>Chair: Deborah Boyer</b>	Oversees staff and contracts, corporate finances, insurance, grants, development of budget, Board agendas and meetings, correspondences, outreach, bylaws and policies, public relations, newsletter, relations with other CBDs, political reps and public agencies, Board elections, policy formation, fundraising, etc. Consists of all of the officers of the corporation.
<b>SOBO</b> (Sidewalk Operations, Beautification and Order Committee)   <b>Co-Chairs: Tanicia Jackson and Michelle Lane</b>	Oversees service provider or employees involved in the maintenance and improvement of the public rights of way, including sidewalk sweeping, steam cleaning, landscaping, private security, personnel and non-personnel expenses.   Relations with OPD, BART, ATC
<b>DISI Committee</b> (District Identity and Streetscape Improvements)   <b>Chair: Andrea Kirkpatrick</b>	Projects would include those that markets and promotes the district or promotes positive aspects of the Lake Merritt/Uptown District.  Those Issues may include: branding of the district, development of a new logo, special events, Website development and maintenance, beautification programs, banner program, streetscape issues including landscaping design, bus shelters, festival poles, holiday decorations, visual linkages, new public spaces projects, improvements to Snow Park.
<b>Land Use Committee</b>  <b>Chair: Indrajit Obeysekere</b>	Planning, zoning, parking, parking meter revenues, shuttle, parking enforcement, transportation, mixed use developments, FARs, Community Plan, Review of new construction and its impact, street relationship.
<b>Community Advisory Committee</b>  <b>Chair: Chris Curtis</b>	Resident's liaison, outreach to community organizations. Issues including residential special benefit needs including evening security, parking for guests and visitors, beautification programs, programs responsive to pet owner needs;

**LAKE MERRITT/UPTOWN COMMUNITY BENEFIT DISTRICT**

388 19th Street • Oakland, California 94612



### Organization Committee Budget Analysis, LMUDA 2010

2009 Gross Budget	2009 Collected 8/31/09	2009 Delinquency Rate	2010 Gross Budget, projected	2010 Gross budget at 94%	2009 % Org Budget (Admin)	Proposed Org 2010 %
\$ 1,091,517	\$ 1,026,225	6%	\$ 1,107,999	\$ 1,041,519	14.8 % or \$ 152,000	15 % or \$ 160,000

### SOBO Budget Analysis, LMUDA 2010

2009 Gross Budget	2009 Collected 8/31/09	2009 Delinquency Rate	2010 Gross Budget, projected	2010 Gross budget at 94%	SOBO 2009 %	Proposed SOBO 2010 %
\$ 1,091,517	\$ 1,026,225	6%	\$ 1,107,999	\$ 1,041,519	64% or \$ 660,000 (included DISI portion)	61% or \$638,233

### DISI Budget Analysis, LMUDA 2010

2009 Gross Budget	2009 Collected 8/31/09	2009 Delinquency Rate	2010 Gross Budget, projected	2010 Gross budget of 94%	DISI 2009 %	Proposed DISI 2010 %
\$ 1,091,517	\$ 1,026,225	6%	\$ 1,107,999	\$ 1,041,519	6.8% or \$ 70,000	7% or \$70,000

### LAKE MERRITT/UPTOWN COMMUNITY BENEFIT DISTRICT

**Preliminary Budget by Category, 2010:**

Category of Speciof Benefit Service	Estimofed Percentage - 2010	Estimated Amount 2010
SOBO	61%	\$ 638,233
DISI	7%	\$ 70,000
Administration, personnel and non personnel	15%	\$ 160,000
Contingency	15%	\$ 156,286
Shuttle Allocation	2%	\$ 16,000
<b>Total</b>	<b>100%</b>	<b>\$ 1,041,519</b>

Joint Administration Budoet: 2010 (Personnel and Non-Personnel)

Personnel Contracts: \$ 270,000

Non-Personnel Expenses: \$ 50,000

Estimated @ \$25,000 (rent, utilities, phone/fax, web, etc.) per district. Current budget for each district is around \$31,000 for 2009. No need to outfit office with office furniture and computers in 2010.

# Management District Plan

## District Improvement and Activity Plan

All of the improvements and activities detailed below, are provided only to properties defined as being within the boundaries of the District and provide special benefit to the property owners of those properties within the District. No improvements or activities are provided to properties outside the District boundaries. All benefits derived from the assessments outlined in this Management District Plan fund services directly benefiting the property owners in this specialized zone. Inasmuch as all services will be provided to the properties defined as being within the District boundaries and no services will be provided outside the District boundaries, any potential general benefits are intangible and not quantifiable.

All benefits derived from the assessments outlined in the Management District Plan are for services directly benefiting the property, business owners and residents within this area and support increased security, cleanliness, commerce, business attraction and retention, increased property rental income, improved District identity, and specialized beautification and enhanced security programs for the residential land uses within the District.

All services, projects, security, maintenance, beautification and professional/administration services are provided solely to properties within the District. No services will be provided to non-assessed parcels outside of the District boundaries.

The total improvement and activity plan budget for 2009, which is funded entirely by property assessments, is projected at \$ 1,091,517.00.

The Lake Merritt/Uptown Community Benefit District Steering Committee has prioritized the following categories of special benefit services for the new District. The categories of special benefit services provide enough clarity to property owners to understand the intent of the budget category, however give the District Management Corporation the flexibility it needs to allocate the services based upon the changing needs of the district from year to year within each budgeted category.

### SIDEWALK OPERATIONS, BEAUTIFICATION, ORDER AND DISTRICT IDENTITY: \$ 860,000 79%

Examples of these special benefit services and costs include, but are not limited to:

- Private security over and above those services currently provided by the Oakland Police Department, BART Police, Alameda County Transit Authority Police and the Alameda County Sheriff's Department;
- Regular sidewalk and gutter sweeping,
- Regular sidewalk steam cleaning
- Spot steam cleaning as necessary

- Beautification throughout the district
- Enhanced trash emptying
- Removal of bulky items as necessary
- Timely graffiti removal, within 24 hours as necessary
- Tree and vegetation maintenance
- Parking assistance
- Special events
- Strategies to improve District Identity
- Holiday decorations
- Web site development and maintenance
- Communications
- Planning of new outdoor public spaces
- Banner program
- Maintenance vehicle and equipment costs (if done in house)

**TABLE 4 – A**  
**SPECIAL BENEFIT SOBODI SERVICES BROKEN DOWN BY ESTIMATED COSTS:**

<b>Sidewalk Operations, Beautification, Order and District Identity (SOBODI)</b>	<b>Anticipated First Year Task frequency</b>
Sidewalk Sweeping	As determined by Management Corporation, but at least five times per week. Enhanced sweeping for residential areas seven days per week
Steam Cleaning	District wide, four times per year
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
Security	As determined by Management Corporation, but at least five days per week during morning and evening employee ingress and egress to the BART Station
Beautification	As the budget allows, the main commercial pedestrian corridors will be enhanced with trees, hanging plants and potted plants
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	As soon as noticed or reported
Tree and shrub planting and maintenance	Weekly or as needed
Miscellaneous	As needed



**ADMINISTRATION AND CORPORATE OPERATIONS:**

**\$ 185,000 17%**

Examples of these special benefit services and costs include, but are not limited to:

- o Staff and administrative costs
- o Insurance
- o Office related expenses
- o Financial reporting
- o Accounting
- o Legal work

**CONTINGENCY/CITY AND COUNTY FEES/RESERVE:**

**\$ 46,517 4%**

Examples of these special benefit services and costs include, but are not limited to:

- o Delinquencies
- o City Fees
- o County fees
- o Reserves

**Reserve for Slow Payments:**

A percent of the budget is held in reserve to offset delinquent and/or slow payment from both public and private properties.

**City and County Fees:**

Assessments are budgeted in order to fund the expenses charged by the City of Oakland and Alameda County for collection and distribution of the CBD assessments.

**Reserves:**

Reserves are budgeted for those funds that remain from the 5% set aside, that are over and above those that have not been collected and are over and above the city and county fees. These reserves shall be carried forward from year to year, or may be reallocated to the designated budgetary categories found within the Management District Plan.

Repayment of Formation and Advanced Services Funds from First Year Assessments:

Property owners who advanced funds for the formation of the Lake Merritt/Uptown CBD, as well as the funds for any advanced special benefit services prior to the receipt of the first assessment installment shall be entitled to be fully repaid for any verifiable contributions to the CBD effort. Those reimbursements may be paid by the District Management Corporation out of the first year or second year receipts. The amount of reimbursable funds should not exceed 25% of the total first year budget for formation costs and advanced special benefit funded prior to December 31<sup>st</sup>, 2008.

**Table 4-B**  
**Summation of Categories of Special Benefit Services for the Lake Merritt/Uptown Community Benefit District**

PROGRAM OR ACTIVITY FUNDED BY THE LAKE MERRITT/ UPTOWN COMMUNITY BENEFIT DISTRICT	APPROXIMATE% OF FIRST YEAR ANNUAL BUDGET	ESTIMATED ANNUAL COSTS (FIRST YEAR FUNDING SOURCE)
Sidewalk Operations, Beautification Order and District Identity	79%	\$ 860,000.00 (Building square footage and linear frontage assessments)
Administration/Corporate Operations	17%	\$ 185,000.00 (Lot or parcel assessments)
Contingency/City and County Fees/Reserves	4%	\$ 46,517.00 (Lot or parcel assessments)
<i>TOTAL</i>	100%	\$ 1,091,517.00

Ten Year Operating Budget:

A projected ten-year operating budget for the proposed Lake Merritt/Uptown Community Benefit District is provided below. The projections are based upon the following assumptions:

- Assessments will be subject to changes in the Alameda County Consumer Price Index (CPI), with annual increases not to exceed 5% per year. Increases will be determined by the District Management Corporation Board of Directors and in no case shall annual increases exceed 5% per year, contingent upon approval by the Oakland City Council.

Assessments for specific programs may be reallocated from year-to-year among District activities within a 10% range within each budget line item and may not exceed 10% of the total budget for all programs and activities. Changes based

Lake Merritt Uptown District Association  
Profit & Loss Budget Performance  
August 2010

2010 Budget

	Curr. Actual	Current Budget	Curr. Variance	Percent	YTD Actual	YTD Budget	YTD Variance	Percent	Annual Budget	Variance Explanation
<b>INCOME</b>										
<b>Earned revenues</b>										
Assessments & dues - orgs										
Assessment Revenue										
Prior Year Bal - Carry Forward	0.00	23,541.54	-23,541.54	0.0%	0.00	188,332.32	-188,332.32	0.0%	282,498.48	Year-end 2009 Revenue not spent; carried forward
Assessment Revenue - Other	0.00	88,793.25	-88,793.25	0.0%	855,251.22	994,340.00	-139,088.78	85.9%	1,041,519.00	YTD collected assessments greater than YTD budgeted amount
<b>Total Assessment Revenue</b>	<b>0.00</b>	<b>110,334.79</b>	<b>-110,334.79</b>	<b>0.0%</b>	<b>855,251.22</b>	<b>882,678.32</b>	<b>-27,427.10</b>	<b>96.9%</b>	<b>1,324,017.48</b>	
Total Assessments & dues - orgs	0.00	110,334.79	-110,334.79	0.0%	855,251.22	882,678.32	-27,427.10	96.89%	1,324,017.48	
Miscellaneous revenue	0.00				1,223.12		1,223.12			Incl. reimb. from DOA for portion of GL Insur 4
<b>Total Earned revenues</b>	<b>0.00</b>	<b>110,334.79</b>	<b>-110,334.79</b>	<b>0.0%</b>	<b>856,474.34</b>	<b>882,678.32</b>	<b>-26,203.98</b>	<b>97.0%</b>	<b>1,324,017.48</b>	residual event revenue in Alta Alliance Bank
<b>TOTAL INCOME</b>	<b>0.00</b>	<b>110,334.79</b>	<b>-110,334.79</b>	<b>0.0%</b>	<b>856,474.34</b>	<b>882,678.32</b>	<b>-26,203.98</b>	<b>97.0%</b>	<b>1,324,017.48</b>	
<b>EXPENSES</b>										
<b>CONTINGENCY</b>										
	0.00	10,593.21	-10,593.21	0.0%	0.00	158,745.70	-158,745.70	0.0%	235,118.54	
<b>DISTRICT IDENTITY (DISI)</b>										
<b>Advertising</b>										
Insert	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%	0.00	Not budgeted
<b>Total Advertising</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.0%</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.0%</b>	<b>0.00</b>	
Banner Program	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%	0.00	Not budgeted
Misc	0.00	2,219.58	-2,219.58	0.0%	4,010.00	17,758.89	-13,748.89	22.58%	26,835.00	Lic of 50 photos (\$750), TNL (\$2500), Banner (\$500)
Public Relations	2,250.00	2,250.00	0.00	100.0%	15,750.00	18,000.00	-2,250.00	87.5%	27,000.00	Under budget
Public Space Development	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%	0.00	Not budgeted
<b>Special Events</b>										
<b>Art &amp; Soul</b>										
First Friday	0.00				5,000.00		5,000.00			Not budgeted
Great Wall	0.00	2,083.33	-2,083.33	0.0%	13,041.91	18,668.88	-5,626.97	78.25%	25,000.00	Prorated monthly, within annual budget
Midtown Oakland Arts District	0.00	500.00	-500.00	0.0%	1,500.00	4,000.00	-2,500.00	37.5%	5,000.00	Prorated monthly, within annual budget
First Friday - Other	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%	0.00	Misc events not budgeted
<b>Total First Friday</b>	<b>0.00</b>	<b>2,583.33</b>	<b>-2,583.33</b>	<b>0.0%</b>	<b>14,541.91</b>	<b>20,668.88</b>	<b>-6,126.97</b>	<b>70.38%</b>	<b>31,000.00</b>	Prorated monthly, within annual budget
Holiday Parades	0.00	125.00	-125.00	0.0%	0.00	1,000.00	-1,000.00	0.0%	1,500.00	Budgeted event not yet taken place
Lake Merritt Event	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%	0.00	Misc events not budgeted
Tree Lighting	0.00	418.88	-418.88	0.0%	0.00	3,333.38	-3,333.38	0.0%	5,000.00	Budgeted event not yet taken place
WOBOLMUDA	0.00	125.00	-125.00	0.0%	1,500.00	1,000.00	500.00	150.0%	1,500.00	Prorated monthly, within annual budget
<b>Total Special Events</b>	<b>0.00</b>	<b>3,249.99</b>	<b>-3,249.99</b>	<b>0.0%</b>	<b>21,041.91</b>	<b>28,000.04</b>	<b>-6,958.13</b>	<b>80.9%</b>	<b>39,000.00</b>	
Trash Cans	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%	0.00	Not budgeted
Website	0.00	337.50	-337.50	0.0%	4,024.18	2,700.00	1,324.18	149.04%	4,050.00	website maint, domain mgmt, network subscription
<b>TOTAL (DISI)</b>	<b>2,250.00</b>	<b>9,057.07</b>	<b>-6,807.07</b>	<b>27.9%</b>	<b>44,826.97</b>	<b>64,458.72</b>	<b>-19,631.75</b>	<b>69.5%</b>	<b>98,885.00</b>	
<b>ORGANIZATION</b>										
<b>Non-personnel expenses</b>										

Lake Merritt Uptown District Association  
Profit & Loss Budget Performance  
August 2010

	Curr. Actual	Current Budget	Curr. Variance	Percent	YTD Actual	YTD Budget	YTD Variance	Percent	Annual Budget	Variance Explanation
Computer Service & Support	0.00	41.87	-41.87	0.0%	0.00	333.32	333.32	0.0%	500.00	Under budget
Fees & Pennants	17.50	12.50	5.00	140.0%	1,165.00	100.00	1,065.00	1,165.0%	150.00	Incl California Downtown Association & International Downtown Association memberships \$1032.50 total
Insurance										
Directors & Officers	0.00	191.87	-191.87	0.0%	2,202.00	1,933.32	668.68	143.61%	2,300.00	Within annual budget, slight increase in annual prem.
General Liability	718.00	225.00	493.00	319.11%	2,718.00	1,800.00	918.00	151.0%	2,700.00	Within annual budget, increase in annual prem
<b>Total Insurance</b>	<b>718.00</b>	<b>416.87</b>	<b>301.13</b>	<b>172.32%</b>	<b>4,920.00</b>	<b>3,333.32</b>	<b>1,586.68</b>	<b>147.8%</b>	<b>5,000.00</b>	
Legal & Accounting Expenses	0.00	166.87	-166.87	0.0%	2,737.00	1,333.32	1,403.68	205.38%	2,000.00	Over budget due to cost of first annual audit
Misc	98.18				2,733.75					Incl annual breakfast, no water & cooler, networking
Occupancy expenses										
Rent, parking, other occupancy	126.00	1,208.34	-1,082.34	10.43%	8,078.50	9,866.64	-1,580.14	83.55%	14,500.00	Prorated monthly, within annual budget
<b>Total Occupancy expenses</b>	<b>126.00</b>	<b>1,208.34</b>	<b>-1,082.34</b>	<b>10.43%</b>	<b>8,078.50</b>	<b>9,866.64</b>	<b>-1,580.14</b>	<b>83.55%</b>	<b>14,500.00</b>	
Office furniture & equipment	0.00				788.87					Purchase of additional desk & computer
Postage, shipping, delivery	75.34	108.34	-33.00	69.54%	1,549.70	888.94	660.76	83.43%	1,300.00	Prorated monthly, within annual budget
Printing & copying	341.84	183.34	158.50	168.45%	2,128.11	1,480.54	647.57	145.1%	2,200.00	Includes cost of metal plates for trash cans, SB26 50
Supplies	795.71	291.87	504.04	272.61%	2,102.79	2,333.32	-230.53	90.12%	3,500.00	Prorated monthly, within annual budget
Telephone & telecommunications	220.54	166.57	53.87	132.32%	1,875.73	1,333.32	542.41	140.88%	2,000.00	Within annual budget
<b>Total Non-personnel expenses</b>	<b>2,391.11</b>	<b>2,595.87</b>	<b>-204.76</b>	<b>92.11%</b>	<b>27,027.25</b>	<b>20,788.52</b>	<b>6,238.73</b>	<b>130.48%</b>	<b>31,150.00</b>	
ORG/Special Projects										
Misc Projects	0.00				1,398.82					In-Oak Mixer
Shuttle	0.00	1,333.34	-1,333.34	0.0%	998.05	10,586.64	-9,588.59	9.36%	16,000.00	Purchase of T-shirts, major costs not yet incurred
<b>Total ORG/Special Projects</b>	<b>0.00</b>	<b>1,333.34</b>	<b>-1,333.34</b>	<b>0.0%</b>	<b>2,396.87</b>	<b>10,586.64</b>	<b>-8,189.77</b>	<b>27.16%</b>	<b>16,000.00</b>	
Personnel & Related										
Suff Personnel	11,250.00	11,250.00	0.00	100.0%	90,000.00	90,000.00	0.00	100.0%	135,000.00	No Variance
<b>Total Personnel &amp; Related</b>	<b>11,250.00</b>	<b>11,250.00</b>	<b>0.00</b>	<b>100.0%</b>	<b>90,000.00</b>	<b>90,000.00</b>	<b>0.00</b>	<b>100.0%</b>	<b>135,000.00</b>	
<b>TOTAL ORGANIZATION</b>	<b>13,641.11</b>	<b>15,179.21</b>	<b>-1,538.10</b>	<b>89.97%</b>	<b>116,983.82</b>	<b>121,433.16</b>	<b>-4,449.34</b>	<b>88.82%</b>	<b>162,150.00</b>	
SOBO										
Beautification	0.00	5,833.34	-5,833.34	0.0%	0.00	45,858.84	-45,858.84	0.0%	70,000.00	Waiting for approval from City
Maintenance	20,820.33	19,065.25	1,755.08	108.08%	167,283.84	169,767.31	-2,483.47	98.52%	246,138.31	Within annual budget
Misc SOBO expenses	0.00	8,172.50	-8,172.50	0.0%	1,182.58	85,360.00	-84,177.42	1.78%	98,070.00	Incl trash can encroach. permit, small tools
Security	36,071.12	30,368.92	5,702.20	118.73%	255,805.66	274,378.95	-18,573.29	93.15%	395,855.63	Within annual budget
<b>TOTAL SOBO</b>	<b>56,891.45</b>	<b>63,440.01</b>	<b>-6,548.56</b>	<b>89.65%</b>	<b>424,052.28</b>	<b>558,223.80</b>	<b>-134,171.52</b>	<b>76.24%</b>	<b>810,083.94</b>	
<b>TOTAL EXPENSES</b>	<b>72,782.56</b>	<b>100,299.50</b>	<b>-27,516.94</b>	<b>68.48%</b>	<b>588,872.17</b>	<b>668,659.48</b>	<b>-79,787.31</b>	<b>65.61%</b>	<b>1,324,017.48</b>	
<b>NET ORDINARY INCOME</b>	<b>-72,782.56</b>	<b>4,045.29</b>	<b>-76,827.85</b>	<b>-6.8%</b>	<b>287,602.17</b>	<b>-18,161.18</b>	<b>283,783.33</b>	<b>0.32%</b>	<b>0.00</b>	
<b>NET INCOME</b>	<b>-72,782.56</b>	<b>4,045.29</b>	<b>-76,827.85</b>	<b>-1,799.18%</b>	<b>287,602.17</b>	<b>-18,161.18</b>	<b>283,783.33</b>	<b>-1,653.79%</b>	<b>0.00</b>	

# Lake Merritt District Summary

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*Estimated 2011*

## District Totals

Residential Total	241,819	100%	Condo Total	\$48,363.80
Bldg SF Total	7,763,135	100%	Bldg SF Total	\$494,045.91
Lot Sz Total	3,095,581	100%	Lot Sz Total	\$224,584.40
Frontage Total	41,868	100%	Frontage Total	<u>\$344,129.84</u>
				\$1,111,123.95

OFFICE OF THE CITY CLERK  
2011 JUN 10 PM 2:52

Approved as to form and legality  
*[Signature]*  
Oakland City Attorney's Office

# OAKLAND CITY COUNCIL

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

**RESOLUTION APPROVING THE ANNUAL REPORTS OF THE LAKESHORE/LAKE PARK BUSINESS IMPROVEMENT MANAGEMENT DISTRICT, THE TEMESCAL/TELEGRAPH AVENUE PROPERTY BUSINESS IMPROVEMENT DISTRICT OF 2005, THE LAUREL PROPERTY BUSINESS IMPROVEMENT DISTRICT OF 2005, THE FRUITVALE PROPERTY BUSINESS IMPROVEMENT DISTRICT OF 2006, THE KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT OF 2007, THE DOWNTOWN OAKLAND COMMUNITY BENEFIT DISTRICT OF 2008, AND THE LAKE MERRITT/UPTOWN COMMUNITY BENEFIT DISTRICT OF 2008 ADVISORY BOARDS; CONFIRMING THE CONTINUING ANNUAL ASSESSMENT FOR EACH APPLICABLE DISTRICT FOR FISCAL YEARS 2010/11 AND 2011/12; AND AUTHORIZING PAYMENT OF THE CITY'S CUMULATIVE FISCAL YEAR 2011/12 FAIR SHARE ASSESSMENT IN AN AMOUNT NOT TO EXCEED \$148,165.47 FOR CITY-OWNED PROPERTIES IN THE TEMESCAL/TELEGRAPH AVENUE DISTRICT, KOREATOWN/NORTHGATE DISTRICT, THE DOWNTOWN OAKLAND DISTRICT, AND THE LAKE MERRITT/UPTOWN DISTRICT.**

**WHEREAS**, the City of Oakland Business Improvement Management District (BIMD) Ordinance allows for the formation of business improvement management districts (Chapter 4.48, Ordinance 12190. 1999); and

**WHEREAS**, affected property owners petitioned to form the Lakeshore/Lake Park Business Improvement Management District, the Temescal/Telegraph Avenue Property Business Improvement District of 2005, the Laurel Property Business Improvement District of 2005, the Fruitvale Property Business Improvement District (PBID) of 2006, the Koreatown/Northgate Community Benefit District (CBD) of 2007, the Downtown Oakland Community Benefit District of 2008, and the Lake Merritt/Uptown Community Benefit District of 2008 ("Districts") under said legislation to undertake the Management Plans for the Districts ("Plans") which are on file with the City Clerk; and

**WHEREAS**, the Plans provide for enhanced services such as new security, crime prevention, beautification, parking resolution, sidewalk sweeping, economic development, lighting, and marketing activities with the intent of creating a positive atmosphere in the District areas (as more specifically identified in their respective Plans); and

**WHEREAS**, the Plans were prepared in accord with the provisions of the law overseeing the formation of the Districts as referenced above, and have been filed with the City; and

**WHEREAS**, pursuant to the requirements of the law the Districts were established as follows:

- the Lakeshore/Lake Park Business Improvement Management District on July 16, 2002 pursuant to Resolution No. 77280 C.M.S.,
- the Temescal/Telegraph Avenue Property Business Improvement District of 2005 on July 20, 2004 pursuant to Resolution No. 78730 C.M.S.,
- the Laurel Property Business Improvement District of 2005 on July 19, 2005 pursuant to Resolution No. 79380 C.M.S.;
- the Fruitvale Property Business Improvement District of 2006 on July 18, 2006 pursuant to Resolution No. 80059 C.M.S.;
- the Koreatown/Northgate Community Benefit District of 2007 on July 17, 2007 pursuant to Resolution No. 80788 C.M.S.;
- the Downtown Oakland Community Benefit District of 2008 on July 15, 2008 pursuant to Resolution No. 81479 C.M.S.,
- the Lake Merritt/Uptown Community Benefit District of 2008 on July 15, 2008 pursuant to Resolution No. 81478 C.M.S.; and

**WHEREAS**, the Annual Reports (attached in Exhibit A) have been prepared by the District Advisory Boards and filed with the City Clerk; and

**WHEREAS**, the Annual Report for the Lakeshore/Lake Park Business Improvement Management District includes a determination and recommendation by the District Advisory Board for a permitted 5% increase in the amount of the annual assessment beginning in fiscal year 2011/12; and

**WHEREAS**, the Annual Report for the Temescal/Telegraph Avenue Property Business Improvement Management District includes a determination and recommendation by the District Advisory Board for a permitted 5% increase in the amount of the annual assessment beginning in fiscal year 2011/12; and

**WHEREAS**, the Annual Report for the Laurel Property Business Improvement Management District includes a determination and recommendation by the District Advisory Board for a permitted 2.5% increase in the amount of the annual assessment beginning in fiscal year 2011/12; and

**WHEREAS**, the City Council desires to approve and confirm the Reports, and the continuing annual assessments for the Districts for fiscal years 2010/11 and 2011/12; and

**WHEREAS**, the City owes a cumulative fiscal year 2011/12 fair share assessment of \$148,165.47 for the following City-owned properties:

District	APN	Site Description	Annual Assessment
Temescal/ Telegraph Avenue	014 1219 003 00	Temescal Library at 5205 Telegraph Avenue	\$ 2,112.41
Koreatown/ Northgate	008 0648 016 03	A parking lot at 2100 Telegraph Avenue	\$ 9,500.00
Downtown Oakland	003 0065 009 02	551 16th Street (250 Frank Ogawa Plaza Building area)	\$ 24,667.20
Downtown Oakland	003 0067 001 00	1 Frank H Ogawa Plz. (City Hall)	\$ 28,719.48
Downtown Oakland	003 0067 002 00	1414 Clay Street (Clay Street Garage)	\$ 10,891.20
Downtown Oakland	008 0619 008 01	150 Frank H Ogawa Plz (L. Wilson Building)	\$ 27,296.71
Lake Merritt/ Uptown	088 0623 006 01	1731 Franklin St. (Franklin St. Garage)	\$ 6,963.48
Lake Merritt/ Uptown	008 0655 006 00	Grand Avenue	\$ 2,040.60
Lake Merritt/ Uptown	010 0768 004 00	200 Grand Avenue (Veteran's Memorial Bldg.)	\$ 8,206.46
Lake Merritt/ Uptown	008 0649 005 00	2025 Broadway (Paramount Theatre)	\$ 4,444.88
Lake Merritt/ Uptown	008 0635 001 00	274 19 <sup>th</sup> Street (Snow Park)	\$ 23,323.05
		TOTAL	\$148,165.47

and

**WHEREAS**, funds to pay the assessments owed by the City have been budgeted in General Purpose Fund (1010)/Business Development Organization (88559)/Taxes and Assessments Account (53511)/Business Improvement District Project (C138410) and General Purpose Fund (1010)/Citywide Activities (90591)/Taxes and Assessments Account (53511)/Undetermined Project (0000000); and

**WHEREAS**, until disbursed, BID assessments will be held in a special trust fund established by the Finance and Management Agency on behalf of the Districts in Miscellaneous Trusts Fund (7999)/Neighborhood Commercial Revitalization & Service Delivery System Organization (08721)/Pass Thru Assessments Account (24224)/Undetermined Project (0000000); now therefore be it

**RESOLVED** that the City of Oakland does hereby find that the Advisory Boards for the Lakeshore/Lake Park Business Improvement Management District, the Temescal/Telegraph Avenue Property Business Improvement District of 2005, the Laurel Property Business



Improvement District of 2005, the Fruitvale Property Business Improvement District of 2006, the Koreatown/Northgate Community Benefit District of 2007, the Downtown Oakland Community Benefit District of 2008, and the Lake Merritt/Uptown Community Benefit District of 2008 were duly appointed by Resolutions of the City Council and have filed their Annual Reports for the 2010/11 fiscal year as required by law; and be it

**FURTHER RESOLVED** that the Annual Reports and the continuing annual assessments for the 2010/11 and 2011/12 fiscal years are hereby approved, adopted, and confirmed including a 5% increase in the amount of annual assessments recommended by the Lakeshore/Lake Park Business Improvement Management District Advisory Board beginning in fiscal year 2011/12, a 5% Increase in the amount of annual assessments recommended by the Temescal/Telegraph Avenue Property Business Improvement District Advisory Board beginning in fiscal year 2011/12 and a 2.5% Increase in the amount of annual assessment recommended by the Laurel Property Business Improvement District Advisory Board beginning in fiscal year 2011/12 and the City Council does hereby levy and direct the collection of the assessments for the 2010/11 and 2011/12 fiscal years in accordance with the assessment formulas as provided for in the Annual Reports and the Plans on file with the City Clerk; and be it

**FURTHER RESOLVED** that the proposed method and basis of levying the assessments to be levied against each property in the Districts have not been changed, increased, or modified and are those specified in the Plans and Annual Reports on file with the City Clerk which were previously adopted after holding the required public meetings and public hearings and protest procedures as provided for by law; and be it

**FURTHER RESOLVED** that the assessments shall be attached to the property and collected with the annual county property taxes, and in certain cases, as specified in the Plans, through a special municipal billing; and be it

**FURTHER RESOLVED** that the boundaries of the Districts shall remain the same as specified in the Plans on file with the City Clerk and there are no changes to the boundaries or benefit zones; and be it

**FURTHER RESOLVED** that the types of the improvements and activities proposed to be funded by the levy of assessments on property in the BIDs are those described in the Plans and the Annual Reports on file with the City Clerk. There are no substantial changes in the improvements or activities for the Districts; and be it

**FURTHER RESOLVED** that the 2010/11 and 2011/12 fiscal years assessments for the Districts are as follows:

- Approximately \$153,321 for the Lakeshore/LakePark Business Improvement Management District; and
- Approximately \$245,700 for the Temescal/Telegraph Avenue Property Business Improvement District of 2005; and
- Approximately \$145,738 for the Laurel Property Business Improvement District of 2005; and

- o Approximately \$301,983 for the Fruitvale Property Business Improvement District of 2006; and
- o Approximately \$278,460 for the Koreatown/Northgate Community Benefit District of 2007; and
- o Approximately \$934,411 for the Downtown Oakland Community Benefit District of 2008; and
- o Approximately \$1,107,999 for the Lake Merritt/Uptown Community Benefit District of 2008; and be it

**FURTHER RESOLVED** that the amount chargeable to each parcel in each District shall be as determined by the Plans and Annual Reports on file in the Office of the City Clerk; and be it

**FURTHER RESOLVED** that the City shall pay a cumulative fiscal year 2011/12 fair share assessment of an amount not to exceed \$148,165.47 for City-owned property as more specifically described in the recitals above; and be it

**FURTHER RESOLVED** that the City Administrator is hereby authorized to enter into annual contracts and related amendments with any nonprofit corporation comprised of the assesseees themselves designated by the owners through the Advisory Board for the District for the security, marketing, 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 BMD Ordinance.

IN COUNCIL, OAKLAND, CALIFORNIA, \_\_\_\_\_, 2011

**PASSED BY THE FOLLOWING VOTE:**

AYES- BROOKS, BRUNNER, DE LA FUENTE, KAPLAN, KERNIGHAN, NADEL, SCHAAF and  
PRESIDENT REID

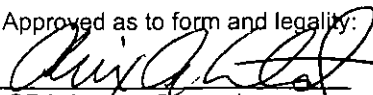
NOES-

ABSENT-

ABSTENTION-

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

10:52 AM  
JUL 20 2008  
CITY OF OAKLAND

Approved as to form and legality:  
  
ORA Agency Counsel

# REDEVELOPMENT AGENCY OF THE CITY OF OAKLAND

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

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**RESOLUTION AUTHORIZING PAYMENT OF THE REDEVELOPMENT AGENCY'S CUMULATIVE FISCAL YEAR 2011/12 FAIR SHARE ASSESSMENT IN AN AMOUNT NOT TO EXCEED \$33,860.56 FOR AGENCY-OWNED PROPERTIES IN THE KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT OF 2007, THE DOWNTOWN OAKLAND COMMUNITY BENEFIT DISTRICT OF 2008, AND THE LAKE MERRITT/UPTOWN COMMUNITY BENEFIT DISTRICT OF 2008.**

**WHEREAS**, the City of Oakland Business Improvement Management District (BIMD) Ordinance allows for the formation of business improvement management districts (Chapter 4.48, Ordinance 12190. 1999); and

**WHEREAS**, affected property owners petitioned to form the Koreatown/Northgate Community Benefit District (CBD) of 2007, the Downtown Oakland Community Benefit District of 2008, and the Lake Merritt/Uptown Community Benefit District of 2008 ("Districts") under said legislation to undertake the Management Plans for the Districts ("Plans") which are on file with the City Clerk; and

**WHEREAS**, the Plans provide for enhanced services such as new security, crime prevention, beautification, parking resolution, sidewalk sweeping, economic development, lighting, and marketing activities with the intent of creating a positive atmosphere in the District areas (as more specifically identified In their respective Plans); and

**WHEREAS**, the Plans were prepared in accord with the provisions of the law overseeing the formation of the Districts as referenced above, and have been filed with the City; and

**WHEREAS**, pursuant to the requirements of the law the Koreatown/Northgate Community Benefit District of 2007 was established on July 17, 2007, pursuant to Resolution No. 80788 C.M.S and the Downtown Oakland Community Benefit District of 2008 was established on July 15, 2008, pursuant to Resolution No. 81479 C.M.S. and the Lake Merritt/Uptown Community Benefit District of 2008 was established on July 15, 2008 pursuant to Resolution No. 81478 C.M.S.; and

**WHEREAS**, the Agency owes a cumulative fiscal year 2011/12 fair share assessment of \$33,860.56 for the following Agency-owned properties:

District	APN	Site Description	Annual Assessment
Downtown Oakland	001 0201 010 00	822 Washington Street (Parking Lot)	\$ 2,696.86
Downtown Oakland	002 0097 045 00	12th Street (John B. Williams Plz.)	\$ 4,076.94
Downtown Oakland	008 0620 009 03	524 16 <sup>th</sup> Street (Parking Lot)	\$ 2,149.54
Downtown Oakland	008 0641 008 05	540 17 <sup>th</sup> Street (Oakland Ice Rink)	\$ 21,515.06
Lake Merritt/Uptown	008 0649 09 00	490 20 <sup>th</sup> Street	\$ 1,386.66
Koreatown/Northgate	008 0649 010 00	2016 Telegraph Ave.	\$ 2,035.50
		<b>TOTAL</b>	<b>\$ 33,860.56</b>

and

**WHEREAS**, funds to pay the assessment of affected Agency-owned property located in the Koreatown/Northgate Community Benefit District of 2007, the Downtown Oakland Community Benefit District of 2008, and the Lake Merritt/Uptown Community Benefit District of 2008 have been budgeted in the Oakland Redevelopment Agency Unrestricted Land Sales Projects Fund (9553)/CIP Organization (94800)/Taxes and Assessments Account (53511)/Business Improvement District Project (P125110); now therefore be it

**RESOLVED** that the Redevelopment Agency of the City of Oakland hereby authorizes payment of the assessments for the six Agency-owned properties as described above in an aggregate amount not to exceed \$33,860.56 for the 2011/12 fiscal year assessment period from the Oakland Redevelopment Agency Unrestricted Land Sales Projects Fund (9553)/CIP Organization (94800)/Taxes and Assessments Account (53511)/Business Improvement District Project (P125110).

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**PASSED BY THE FOLLOWING VOTE:**

AYES- BROOKS, BRUNNER, DE LA FUENTE, KAPLAN, KERNIGHAN, NADEL, SCHAAF and PRESIDENT REID

NOES-

ABSENT-

ABSTENTION-

ATTEST: \_\_\_\_\_

LATONDA SIMMONS  
Secretary of the Redevelopment Agency  
of the City of Oakland, California