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

TO: Office of the City Administrator
ATTN: Dan Lindheim
FROM: Community and Economic Development Agency
DATE: January 13, 2009

RE: **A Resolution Authorizing A Professional Services Agreement With The Oakland Merchant Leadership Forum (OMLF) For Merchant Organizing And Commercial District Support Services For FY 2008-2009 In An Amount Not To Exceed \$60,000, And Accepting A Contribution Of \$18,989 From The Redevelopment Agency Under The Cooperation Agreement For This Purpose**

An Agency Resolution Authorizing A Contribution Of \$18,989 In Coliseum Redevelopment Project Funds To The City Under The Cooperation Agreement For A Professional Services Agreement With The Oakland Merchant Leadership Forum (OMLF) For Merchant Organizing And Commercial District Support Services For FY 2008-2009 In The Coliseum Redevelopment Project Area

SUMMARY

Two resolutions have been prepared authorizing the City Administrator to negotiate and execute a professional services contract with the Oakland Merchant Leadership Forum (OMLF) in a total amount not to exceed \$60,000 for Fiscal Year 2008-2009.

The \$60,000 contract with OMLF will provide funding for the balance of FY 2008-2009 for the following activities: continuation of monthly Merchant Educational Forums, continuation of timely information and referral services for commercial district leaders and merchants, participation in city wide merchant and commercial district promotion and marketing activities, and the continued involvement in the implementation of the city-wide retail enhancement strategy.

The contract will be funded by City of Oakland and Coliseum Redevelopment Area funds. OMLF will be responsible for disseminating information about the Coliseum project area (specifically allowed under H&S code section 33131) and increasing patronage of businesses in the Coliseum project area, thus keeping them in business and preventing economic blight.

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FISCAL IMPACT

The specific funding for the \$60,000 is: \$41,011 from General Purpose Fund (1010), Business Development Org (88559), Merchant Organizing/Shop Oakland (P275310), Miscellaneous Services (53719), Program SC11. The remaining \$18,989 will come from ORA Projects Fund (7780), Business Development Organization (88559), Coliseum Redevelopment Project C82620, and Program SC11.

BACKGROUND

Founded in 1991, the mission of OMLF is to improve the quality of life for Oakland's residents and small business owners by strengthening and unifying their neighborhood business districts. By bringing together the efforts of Oakland's many small business associations to develop policies and strategies that benefit neighborhood business districts, OMLF strives to increase economic development, community pride and civic participation. See *Attachment A* for additional information.

KEY ISSUES AND IMPACTS

Staff has worked closely with the Board of Directors of the Oakland Merchant Leadership Forum to enhance their program in order to provide a wider range of technical assistance services, increase marketing activities for the commercial districts and act as a round-table for the Business Improvement Districts (BIDs). Additionally, staff has worked with OMLF to formalize the Merchant Association Assistance Grant Program (MAAP), a small grant program available to merchant associations in 2007-08. This contract will continue to fund critical outreach services to merchant associations on a timely basis. Attendance at the monthly forums has increased due to merchant concerns related to safety, parking and the need for information regarding City services.

Staff is going forward with implementation of the City Wide Retail Enhancement Strategy, and OMLF will be a critical partner in maintaining contact with and strengthening the capacity of existing merchant associations. OMLF will also be called upon to assist in the formation of new merchant associations in targeted districts.

PROJECT DESCRIPTION

OMLF shall continue to assist the City of Oakland with the development of Oakland's neighborhood commercial districts by supporting merchant associations through outreach, organizational development, technical assistance, event promotion and marketing activities. OMLF is responsible for the following activities: Provide support services as directed for the City wide Retail Enhancement Project, provide an educational and training forum for Oakland Merchant Associations and Business Improvement Districts (BIDs), and provide special outreach and training services to East and West

Oakland commercial districts. The detailed Scope of Services is included as *Attachment B*.

ACCOMPLISHMENTS

Key accomplishments in 2007-2008:

- 12 Educational Forums for Merchant Associations.
 - City Support for Commercial Districts
 - City Wide Retail Enhancement Presentation
 - Shop Oakland and Holiday Marketing
 - Oakland Passport Campaign
 - Commercial District Parking Issues
 - Oakland Retail Strategy Overview
 - Small Business Financing Options
 - Crime & Safety in Commercial Districts
- Update of Oakland Merchant Tool Kit and uploading on OMLF website.
- Improved outreach to merchant groups and BIDS through upgraded website, e-communications to a database of over 1,200 contacts, which represents 36 Merchant Associations.
- Provided assistance to 7 BID Managers; OMLF was responsible for staffing the formation of the Oakland BID Managers Council.
- Assisted staff in formalizing the Merchant Association Assistance Grant Program – 14 grants were reviewed by OMLF: responsible for outreach and marketing of the MAAP Program at an average grant size of \$4,000.
- Coordination of 2008 Shop Oakland Campaign – “Oakland Grown” – outreach
- In 2007, OMLF distributed 66,500 bags to 30 different merchants; in 2008, OMLF will distribute 100,000 reusable shopping bags in December 2008.
- Coordinated 2007 Oakland Passport Promotion Campaign – A coupon book of 115 Oakland retailers and merchants; 100,000 books were distributed. OMLF raised \$5,000 worth of prize donations from Oakland businesses and generated \$8,000 in advertisements.
- Served as an information and referral resource for commercial district leaders; disseminated information from City of Oakland, Council District Offices, Police, Mayor’s Office, Recycling and other agencies.
- Provided information to individual merchants and merchant associations.

EVALUATION OF PAST PERFORMANCE

The City of Oakland has contracted with OMLF since 2004 to provide merchant organizing and activities that promote Oakland’s neighborhood commercial districts, in particular promoting the Shop Oakland campaign. Most recently, the City Council approved Resolution No.81219 C.M.S. authorizing the City Administrator to amend a Professional Services Contract with OMLF in the amount of \$40,000 for a total contract of \$112,500 for the period of July 1, 2007 – June 30, 2008. The City Council has

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determined that OMLF is uniquely qualified to coordinate development and capacity building of merchant associations and to coordinate the participation of Oakland merchants in various promotion campaigns. The Oakland Merchant Leadership Forum satisfactorily completed its FY 07-08 Scope of Work. The measurements used to gauge the performance of OMLF were an evaluation of work products, activities and interviews with merchant leaders.

SUSTAINABLE OPPORTUNITIES

Economic: Marketing City of Oakland services and programs to neighborhood merchant associations and increasing merchant association participation in the Shop Oakland and the Oakland Passport campaigns are activities that strengthen merchant associations, support neighborhood retail, expand local and outside shoppers' awareness of Oakland's shopping districts and increases City sales tax revenues. Retail businesses contribute to the vitality of the City by increasing Oakland residents' access to goods and services, employment opportunities, and sales tax contributions.

Environmental: Oakland's merchant associations have effectively organized on a number of issues in their commercial districts including landscaping and identity markers, cleanliness, safety, and sustainable business practices to increase the attractiveness and desirability of their shopping areas.

Social Equity: Performing outreach to merchant associations citywide to provide information about programs, services and opportunities that support Oakland's commercial districts facilities capacity building and empowerment. Building the capacity of merchant associations throughout Oakland, to address a range of issues which affects the viability and vitality of a commercial district, is accomplished through experienced technical assistance and the sharing and mentoring of merchant associations by other associations.

DISABILITY AND SENIOR CITIZEN ACCESS

Approval of the resolution has no direct implication for disability and senior access.

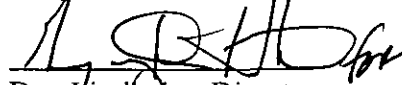
RECOMMENDATION (S) AND RATIONALE

Approval of the resolution will enable OMLF to continue the monthly educational forums for merchant associations and BIDs, serve as an information and referral resource for merchant association leaders, disseminate information, continue efforts to create new merchant associations in East and West Oakland, collaborate with CEDA Business Development Services Team and the City's Marketing Division on the Shop Oakland campaigns, and participate in the implementation of the Citywide Retail Enhancement Strategy.

**ACTION REQUESTED OF THE REDEVELOPMENT AGENCY/CITY
COUNCIL**

It is requested that the Agency and City Council approve the Resolution to authorize the Agency/City Administrator to negotiate and execute a professional services contract with the Oakland Merchant Leadership Forum in an amount not to exceed \$60,000 to continue Merchant Organizing and Commercial District Support Services.

Respectfully Submitted,

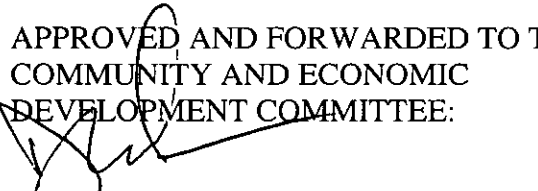


Dan Lindheim, Director
Community and Economic Development Agency

Reviewed By:
Gregory D. Hunter
Deputy Director, Economic Development and Redevelopment

Prepared By:
Aliza Gallo
Business Development Services Coordinator
Economic Development Division

APPROVED AND FORWARDED TO THE
COMMUNITY AND ECONOMIC
DEVELOPMENT COMMITTEE:



Office of the City/Agency Administrator

Attachments

Attachment A: Overview of OMLF & Accomplishments
Attachment B: Proposed Scope of Work

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Oakland Merchants' Leadership Forum 2007-08 Activities Report

Written by: Shari Godinez, Program Manager
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Oakland Merchants' Leadership Forum 2007-08 Activities Report

Background

“On July 10, 2007, the City Council approved Resolution No. 80750 C.M.S., authorizing the City Administrator to execute a Sole Source Professional Services Contract with OMLF in the amount of \$72,500.00 for the period of July 1, 2007 – December 31, 2007, to plan and convene monthly educational forums for merchant leaders and coordinate merchant participation in the City of Oakland’s Shop Oakland Marketing Campaign. The City Council determined that OMLF was uniquely qualified to coordinate development and capacity building of merchant association and to coordinate the participation of Oakland merchants in various promotion campaigns. The Oakland Merchants Leadership Forum satisfactorily completed its scope of work. Additionally, the City Council approved a Program Budget of \$77,500 for FY 2007-2008 and \$77,500 for 2008-2009.”¹

On April 8, 2008, a “Resolution Amending Resolution No. 80750 C.M.S. to authorize an amendment to a professional services agreement with the Oakland Merchants Leadership Forum for merchant organizing and commercial district support services to increase the contract amount by \$40,000 for FY 2007-2008 for a total amount not to exceed \$112,500”² was passed (Resolution No. 81219).

This Report is a summary of all activities and services that Oakland Merchant Leadership Forum (OMLF) has provided for the period of time of July 1, 2007 to June 30, 2008. Additionally OMLF has continued to work closely with the City and is also reporting on activities conducted for the period of time from July 1, 2008 to December 11, 2008.

Crime and Safety Workshops for East & West Oakland

After receiving the contract check on July 31, 2008, OMLF successfully organized two technical assistance crime & safety workshops on September 17 and 18, 2008, at the Eastmont Police Station and the West Oakland Senior Center. The elements of the workshop included crime prevention strategies for Oakland’s commercial districts by discussing the CPTED (Crime Prevention Through Environmental Design) philosophy, and encouraging the implementation of this along with the formation of a Merchant Watch Group. Some other City programs that were also introduced were the Façade Improvement Program and the NSC/NCPC groups through OPD. The Chief of Police also spoke at both workshops.

A video production was created of the West Oakland workshop and will be made available to merchant groups, the Oakland Police Department, Neighborhood Service Coordinators and NCPC groups.

¹ City of Oakland Agenda Report Community and Economic Development Agency, April 8, 2008, p.2

² City of Oakland Agenda Report Community and Economic Development Agency, April 8, 2008, p.1

A twelve page Merchant Watch Safety Booklet (5 ½ x 8 ½) was created to distribute at the workshops. This booklet included information about Merchant Watch including contact information, helpful forms for suspect description and auto description guide, tips on developing a merchant watch roster, robbery survival tips, and CPTED recommendations. The back of the booklet lists important phone numbers for Oakland businesses. NSC officers have requested copies of the booklet for distribution to their neighborhoods.

Forums

Under the terms of the contract OMLF successfully convened nine “monthly educational forums for commercial district leaders with presentations on topics pertinent to small businesses and neighborhood commercial districts, including customer service, crime prevention, marketing, information on City of Oakland programs and services, etc.”³ OMLF has been a key partner in providing “direct merchant-to-city leaders contact and commercial district-to-commercial district networking and communication opportunities.”⁴ Beginning in January 2008 OMLF began recording the forums and linking the audio on the OMLF website in order to allow more merchants access to the information discussed in the forums.

Forum Attendance (see Attachment A)

Forum attendance will fluctuate based on the merchant’s interest in the topic. The average number of attendees for the period of August 2007-October 2008 for twelve forums based on the sign-in sheets is **24.2 or 70% merchants**. However, many regular attendees and OMLF Board members do not sign in at every forum. When a head count is done, it is always higher than the sign-in count. Many of the attendees are BID managers and volunteer district leaders and are there representing **hundreds** of businesses. The information they receive is then taken back and distributed to the merchants in their district meetings or by email. Other attendees include city staff and OPD (average number of attendees 3), and other Business Service Organizations (average number of attendees 4). There is an average of about six new members at each forum. The forum topics that received the highest attendance were, “Tips for Marketing Your Business for FREE On-line” (40) and “Crime & Safety in Commercial Districts” (36).

Example (February 27, 2008 Forum): 21 Merchants and 3 BID Managers (Laurel, Fruitvale & Telegraph/Temescal). Several of the merchants in attendance are volunteer district leaders (Jack London, Downtown, Piedmont Ave, Grand Ave, Chinatown, and each represents several hundred businesses. At least 57% of the attendees were business owners or leaders of business districts. Some other attendees included other non-profit organizations such as EBALDC (represent merchants in Chinatown), Urban Voice, consultants, OBDC (financing for small

³ Attachment A, Scope of Services: Oakland Merchants Leadership Forum contract July 1, 2007- June 30, 2008, p. 1

⁴ Attachment A, Scope of Services: Oakland Merchants Leadership Forum contract July 1, 2007- June 30, 2008, p. 1

business), employment attorney, Business Service Workforce Development, and City CEDA employees.

The areas of Oakland that were represented by the attendees include: Downtown (7), South of Broadway (3), Uptown (1), MacArthur Blvd. Merchants (73rd & MacArthur)(2), Lake Merritt, Rockridge, Dimond, Temescal, Piedmont, Lakeshore, Koreatown, Laurel, West Oakland, Jack London, Montclair, China Hill, Temescal/Telegraph.

There were thirteen new attendees that had never before attended an OMLF meeting.

Link to audio of OMLF Forum on February 27, 2008, "Crime & Safety in Commercial Districts": <http://www.omlf.org/>

Information and Referral Resource

OMLF has successfully served as an information and referral resource for commercial district leaders and several departments in the City of Oakland. OMLF has maintained a log of inquiries and responses or actions taken from July 12, 2007 to October 28, 2008. In this period OMLF has had nearly 100 requests from a variety of sources including district leaders, individual business owners, and business service organizations, various departments in the City of Oakland including Marketing, Zoning & Planning, Oakland Recycle, Equal Access office, Strategic Planning Department, NCPC groups, City Council staff, Office of the Mayor, and the City Attorney's office. This listing is available upon request.

Merchant Association Tool-Kit

The Oakland Merchants' Leadership Forum has made updates to the tool kit and has uploaded the kit to the OMLF website. This allows for a larger distribution, more efficient updates, and is environmentally friendly.

Disseminate Information

OMLF has been successful in disseminating information through the website, emails, mailings, telephone, and through the assistance of BID and volunteer district managers and other business service organization partners about current topics of importance to commercial districts and small business owners such as upcoming City Council agenda items, workshops, events and opportunities.

Email Database (Attachment B)

OMLF currently has an email database of 1,270 active contacts. Over 1,000 of these contacts are Oakland merchants, merchant leaders and BID managers. Each BID manager and district leader represents hundreds of merchants. Information that is sent to the BID managers and volunteer district leaders from OMLF is forwarded on to thousands of Oakland merchants. Contacts have an option to opt out from receiving emails if they choose. OMLF has seen a steady net growth in email contacts since tracking started in November 2007.

Merchant Association Database

OMLF has provided CEDA with a current database of 36 merchant associations in Oakland including the name of association leader and the contact information. This database will be updated again in November 2008. Other City departments including Cultural Arts & Marketing, the Strategic Planning Department, City Council Member DeLaFuente, and The Office of the Mayor have requested this database. OMLF has also provided this database to other business service organizations including East Bay Score, Oakland Rotary Club, and UC Berkeley School of Journalism. OMLF has also received hundreds of requests to forward business related information to their database of merchants.

Citywide Retail Enhancement Project

OMLF successfully arranged interviews with over 50 Oakland merchants, merchant leaders, or BID Directors. Eleven interviews were scheduled by OMLF and completed by Conley Consulting. 39 other merchants have agreed to interview, but arrangements have yet to be made.

BID Council Meeting

OMLF facilitated a BID managers meeting on April 15, 2008 with all BID managers and CEDA's Business Development Department, and attended another BID managers meeting with the City Attorney's office in June 2008.

Marketing and Promotion

Marketing Committee

The marketing committee includes several very active members outside of the OMLF board, including merchants, local press, community members and event planners. In preparation for the holiday season the OMLF marketing committee has met weekly from August to November, putting in countless volunteer hours helping to develop the Oakland Grown campaign, spreading the word to the community, and negotiating trades and sponsorships for food, printing, silent auctions, and more.

Maintain OMLF Website

The OMLF site is designed for **Oakland business owners**. It provides resources and links to City services, retail vacancy services, merchant toolkit, links to the City's business resource site, up-to-date information about coming

events hosted by Oakland's neighborhood commercial districts, event submission form for OVCB, free marketing link for the Shop Oakland site, link and news from Small Business California, legal information on zoning and blight codes, hiring programs, sponsorship opportunities, links to other organizations that provide support for small businesses, audio archives of forums since January 2008, how to get involved with OMLF, information on why to shop local and much, much more.

Visits to OMLF website since March 17, 2008 (Attachment C)

In 7 months (March 13, 2008-October 14, 2008) the OMLF website has had **4,277 page loads**, 1,944 unique visitors, 1,546 first time visitors and 398 returning visitors. This is an **average of 535 page loads per month** and is steadily growing as we continue to market the site as well as the ShopOakland website which links back to the OMLF site for merchants.

Shop Oakland

Cooperative Ads (Attachment D)

OMLF has successfully worked with the City's Marketing Division in alerting businesses and district leaders about cooperative advertising opportunities for the 2007 holiday season through their email database and through announcements from the City's Marketing Department at the OMLF September and October forums. The City was able to underwrite 12 ads for Oakland Magazine in 2007 at \$150.00 each and a total of 64 ads in November and December 2007 in the Oakland Tribune at \$55.00 each for a total of 76 ads. Unfortunately, due to budget cuts, the City was not able to subsidize any cooperative advertising opportunities in 2008. However, the East Bay Express offered to cover the city's subsidy and still provide merchants the discounted rate in an East Bay Express holiday co-op ad.

Shopping Bags

Each year OMLF raises funds through sponsorships to produce 80,000 shopping bags that advertise the Shop Oakland website and deliver for free to Oakland merchants throughout the city so they may distribute to their customers for the holiday season. In November 2007 OMLF distributed 66,500 bags to 30 different merchant associations, which was **an increase of 5,000 bags** from 2006. In addition to delivering the bags, OMLF has used this opportunity to deliver the tool kits, the Passport Coupon books, and invitations for the merchants to attend a Shop Oakland kick-off event.

In 2008 OMLF is collaborating with the City's Oakland Recycles Program and producing **100,000 reusable shopping bags** to distribute for free to Oakland Merchants. Oakland Recycles brought the idea to OMLF and is covering the significant cost to upgrade from paper to reusable bags. This campaign will

include a “Bring Your Own Bag” push to the consumers and a volunteer plastic bag ban for merchants with a cooperative reusable bag-buying program.

Passport Coupon Books

The goal of the Passport coupon book program, to encourage consumers to explore Oakland’s many commercial districts and increase sales for Oakland’s small businesses, was effectively achieved. OMLF successfully recruited **115 Oakland Businesses** from **16 different commercial districts** to participate in the Oakland program and produced and distributed **100,000 books** to consumers in November 2007-March 2008. OMLF received over \$5,000 worth of prize donations from Oakland businesses and generated \$8,000 from ads to go towards the administrative costs and materials. Many participants sent in thank you letters with their entry forms to express their gratitude for the opportunity to explore parts of Oakland they never explored before. Many business owners expressed their excitement in the number of new customers that were generated from the program and although the rules stated, “no purchase necessary,” according to participants, many purchases were generated from the program. Numerous business owners who were not in the program have expressed their strong interest in getting into the next Passport book.

Shop Oakland Website

OMLF has relentlessly announced to Oakland merchants the free opportunity to advertise their business on the Shop Oakland website. In October 2008 an OMLF volunteer Board member redesigned the Shop Oakland site to be more user friendly and include partnership links and include the new Shop Oakland Grown messaging. In November 2008, OMLF collaborated with the City’s Marketing department to clean up the site by removing businesses that no longer exist and aggressively recruiting retail business onto the site.

Shop Oakland Advertising Campaign

With the goal to drive consumers to the Shop Oakland website in order to increase sales for Oakland’s small businesses, OMLF has successfully bartered for over **\$30,000** worth of newspaper advertisement space, radio and television commercial time. In exchange, these advertising businesses received many benefits including their logo on **100,000 reusable shopping bags**. The OMLF marketing committee meets weekly and has generated a series of professional and positive ads that are geared to both inform the consumer on the benefits of shopping local and enlighten them on the numerous opportunities available to shop in Oakland. OMLF was also successful in producing a new tag line, “Oakland grown”, to emphasize the importance of creating a sustainable community and to promote a sense of Oakland pride. This new tag line is linked to the Shop Oakland URL and will enhance the message. Part of the campaign includes the creation and sales of T-Shirts with the “Oakland grown” design and the Shop Oakland URL. OMLF was successful in creating a co-op purchasing agreement with several Oakland retailers to purchase and resell the T-Shirts and

donate a small fee back to OMLF. The program will be expanded if the T-Shirt sales are successful.

Shop Oakland Holiday Kick Off and Merchant Celebration

The 2008 Shop Oakland grown campaign kicks off with a holiday party on November 20 at the Washington Inn in downtown Oakland. The party is free to merchants, offering food, drink, DJ, videos, and local fashion, Oakland Grown t-shirts and more. The party celebrates merchants, provides an opportunity to mingle and relax together, and gives them information about the campaign elements for the holiday season. The party is also an opportunity for OMLF to publicize its work to the community and get more people on our email list so that we can serve the community better as well as communicate offers and issues to them more quickly and inexpensively.

MAAP Funding

In collaboration with CEDA, a grant application form to be used for Merchant Association Assistance Program (MAAP) funding. OMLF would assist CEDA in the distribution, collection, and review process of each application. They would request missing documents, discuss project with applicant and make recommendations to CEDA staff. The amount of funding requests exceeded the money available for this program. For the fiscal year 2007-08 CEDA was able to fund fourteen commercial districts.

Volunteer Hours (Attachment E)

The funds that CEDA invests in the Oakland Merchants' Leadership Forum can significantly multiply in value due to the generation of quality volunteer hours spent on projects. The Board of Directors consists of all business professional volunteers who have a passion and dedication towards the betterment of Oakland's retail districts citywide and have a variety of talents and skills. OMLF has a conservative operating budget with one paid staff at ¾ time. OMLF was able to generate **3,536.5 volunteer hours** with an estimated dollar value of **\$176,825 per year**.

Forum Attendance 2007-2008
Oakland Merchants' Leadership Forum

Topic	Total # sign in	Merchants, Merchant Leaders & Business Professionals	City staff & OPD	Other BSO's	# of new members	# of districts represented	Districts represented
Aug-07 City support for Commercial Districts, Security software, Retail Study, BID updates	13	7	5	1		6	Fruitvale, Temescal, Rockridge, Coliseum, Dimond, Grand Ave
Sep-07 California Downtown Merchants Association, City Support, Retail Study update, BID updates.	13	8	2	3	4	8	Downtown, Piedmont, Rockridge, Peidmont, Dimond, Koreatown, Temescal, Fruitvale
Oct-07 Shop Oakland, Holiday Event ideas, OMLF contract update, MAAP funding, open forum discussion.	20	16	2	2	5	12	Temescal, Dimond, Piedmont, Eastmont, Downtown, Fruitvale, Black Wall Street, Lakeshore, Heartlands (73rd & MacArthur), Lake Merritt, Grand Ave
Nov-07 Shop Oakland Kick-Off Event (over 100 attendees)							
Dec-07 No Forum							
Jan-08 Parking Concerns in Commercial districts	33	27	5	1	11	13	Grand Ave, Rockridge, Dimond, Downtown, 107th & MacArthur, Piedmont, Telegraph, Temescal, Fruitvale, Laurel, Eastlake, Lake Merritt, Heartlands, Mayors office, City council staff
Feb-08 Crime & Safety	36	24	5	10	?	13	Dimond, West Oakland, Downtown, Chinatown, Jack London, Lakeshore, Temescal, South of Broadway, Fruitvale, Laurel, Piedmont, East Oakland (40th & International), Grand Ave
Mar-08 Tips for Marketing your Business for FREE on-line	40	31	3	3	13	16	Downtown, South of Broadway (SOBO), Uptown, Heartlands (73rd & MacArthur), Lake Merritt, Rockridge, Dimond, Peidmont, Lakeshore, Koreatown, Laurel, West Oakland, Jack London, Montclair, China Hill, Temescal/Telegraph

Oakland Merchants' Leadership Forum

Topic	Total # sign in	Merchant Merchant Leaders & Business Professionals	City staff & OPD	other BSO's	# of new member s	# of districts represented	Districts represented
Apr-08 Greening your Business	28	15	7	6	5	9	Piedmont, Grand Ave, Fruitvale, SOBO (south of Broadway), 73rd & MacArthur, West Oakland, Dimond, Downtown, Laurel, City council (Jean Quan)
May-08 Zoning changes affecting commercial areas and hiring opportunities	22	16	2	4	0	10	West Oakland, Grand Ave, Piedmont, Downtown, Chinatown, Laurel, SOBO (South of Broadway), Montclair, Fruitvale, San Pablo
Jun-08 CEDA, Business Development Updates	14	13	0	1	2	8	Temescal, West Oakland, Temescal, Koreatown, Laurel, Chinatown, Fruitvale, South of Broadway
End of Contract Period							
Jul-08 Report from Conley Group on Retail Enhancement Strategy	20	14	2	4	14	7	San Antonio, South of Broadway, Lakeshore, Lake Merritt, Downtown, Old Oakland, Fruitvale
Aug-08 No Forum							
Sep-08 Marketing Opportunities, ideas and information for the Holidays.	20	15	3	2	2	10	Piedmont, Jack London Square, 107th MacArthur, Temescal, Koreatown, Laurel, Heartlands, Grand Ave, SOBO (South of Broadway), Downtown
Oct-08 Financing Opportunities for Small Businesses	31	16	3	12	10	11	Jack London, West Oakland, Piedmont, Laurel, Temescal, Koreatown, Dimond, Grand Ave, SOBO (South of Broadway), Old Oakland, Fruitvale
Nov-08 Shop Oakland Kick-Off Event							
Dec-08 No Forum							

Total = 290 202 39 49 66 123
Average per forum
= 24.2 16.8 3.3 4.1 5.5 10.3
Percentage of total attendees 69.7%

BSO = Business Service Organizations - This includes for profit and non-profit

Attachment B

	2007		2008					
	Prior	Dec	Jan	Feb	Mar	April	May	Jun
New Contacts	719	75	146	37	38	20	40	23
Removed Contacts	0	0	4	9	1	0	0	4
Do Not Mail List	2	6	7	10	10	3	10	6
Growth	717	69	135	18	27	17	30	13
Total Contacts	717	786	921	939	966	983	1013	1026

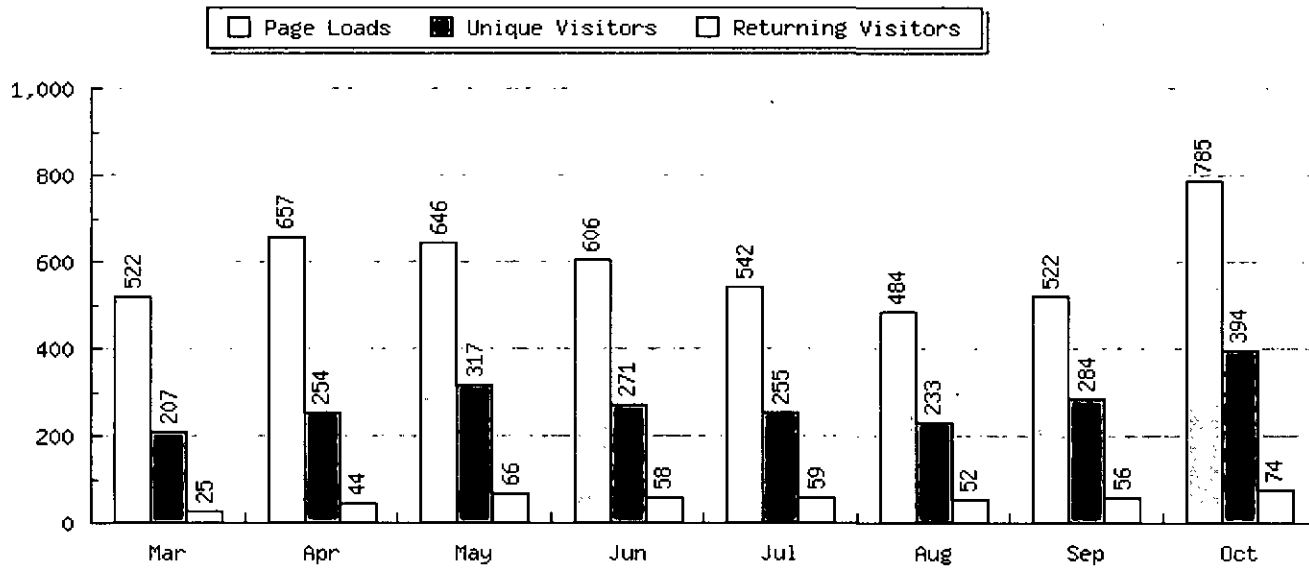
	Jul	Aug	Sep	Oct	Overall
New Contacts	11	221	6	23	1098
Removed Contacts	1	0	0	1	18
Do Not Mail List	0	6	5	3	54
Growth	10	215	1	19	1026
Total Contacts	1036	1251	1252	1271	2297

Key

Prior	Total of the months not shown
Overall	Totals since using Constant Contact
New Contacts	Contacts added to your mailing list.
Unconfirmed Contacts	Contacts removed because they required confirmation
Removed Contacts	Contacts removed by yourself
Do Not Mail List	Contacts moved to your Do Not Mail List.
Growth	Net contact growth.
Total Contacts	Total number of your contacts at the end of that period.

There has been a steady growth in the number of email contacts in the OMLF database. The number of email contacts has more than tripled since November 2007.

Visits to OMLF Website
March - October 2008



Month	Page Loads	Unique Visitors	First Time Visitors	Returning Visitors
Mar-08	522	207	182	25
Apr-08	657	254	210	44
May-08	646	317	251	66
Jun-08	606	271	213	58
Jul-08	542	255	196	59
Aug-08	484	233	181	52
Sep-08	522	284	228	56
Oct-08	785	394	320	74
Total	4764	2215	1781	434
Average	596	277	223	54

Attachment D: 2007 Shop Oakland Holiday Coop Advertising

<u>Outlet</u>	<u># of Participants</u>	<u>Underwriting per participant</u>	<u>Total cost to City</u>
<u>Oakland Magazine</u>			
December 1, 2007	12	\$150	\$2,295
<u>Oakland Tribune</u>			
11/30/2007	32	\$55	
12/14/2007	32	\$55	
			\$3,400

Notes:

Additional expense for Oakland Magazine includes full price of one ad to complete second page and promote Passport.

The number of advertisers exceeded the City's underwriting budget but the Tribune honored the participant cost of \$85 for those businesses. The above figure is just those businesses underwritten by City.

Attachment E

**Oakland Merchants' Leadership Forum
Annual Volunteer Hours 2008**

	Planning meetings	Board Retreat	Committee Meetings	Special meetings	Project work	Event Emails	Event work	Total hours	Average pay rate of \$50.00 per hour.	
Board of Directors										
Co-Chair (Stu Sweetow)	18	5	18	12	8	70	125	6	262	13,100.00
Co-Chair (Ellen Taylor)	15	5	18	64	8	20	100	6	236	11,800.00
Vice Chair (Roberto Costa)	18	5	20	25	10	20	150	4	252	12,600.00
Treasurer (Jerry Henderson)	12	5	18	0	8	8	130	4	185	9,250.00
Secretary (Sarah Lamb)	6	5	16	0	0	0	50	0	77	3,850.00
Director (Erin Kilmer Neel)	16.5	5	20	64	30	194	260	10	600	29,975.00
Director (Aziz Khatri)	15	5	20	8	6	4	150	2	210	10,500.00
Director (Chus Ebako)	12	5	16	54	8	8	150	4	257	12,850.00
Director (David Macon)	3	5	16	0	0	0	50	0	74	3,700.00
Board Total =	115.5	45	162	227	78	324	1165	36	2,153	\$107,625.00
Other volunteers				512		400	400	72	1,384	\$ 69,200.00
Total of volunteer hours	115.5	45	162	739	78	724	1565	108	3,537	\$176,825.00

Attachment E

Board meets monthly for 1.5 hours 12 times per year.
Retreat in February 5 hours
Forums meet monthly 2 hours 10 times per year

Committee Volunteer hours

Marketing Committee meets every week for 2 hours for 6 months and every month for 2 hours after that. There are 8 volunteers on this committee @64 hours each.
Emails - this is the time volunteers spend answering and writing emails

512 Hours marketing committee

400 Hours

Working hours outside of meeting 2 hours each week, @ 25 weeks per year 2008

400 Hours other than meeting time

Oakland Merchants' Leadership Forum

Total volunteer hours from
Marketing committee other than
OMLF Board member. 1312 Hours

Events (Art & Soul, Small
Business Symposium, etc.) 72 Hours volunteers outside of Board members

Total of Volunteer hours other
than Board members 1384 Hours

Technical Assistance Committee
did planning for the Safety
Workshop in September 2008, 5
hours per week by committee
chair and 2 hours per week by
supporting TA members for 5
weeks. 45 Hours

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ATTACHMENT B

2008-2009

SCOPE OF SERVICES: OAKLAND MERCHANTS LEADERSHIP FORUM "CONTRACTOR"

Purpose:

- The Oakland Merchant Leadership Forum (OMLF) Contractor shall assist the City of Oakland with the development of Oakland's neighborhood commercial districts by supporting merchant associations through outreach, organizational development, technical assistance and event promotion and marketing activities.
- Under the terms and conditions of this contract, the Contractor is responsible for the following key activities: provide implementation support services as directed for the City wide Retail Enhancement Project; provide an educational forum for Oakland merchants associations and Business Improvement Districts (BIDs); collaborate with the City of Oakland on marketing and promotion campaigns for Oakland small businesses; and provide special outreach and training services to identified commercial districts to support the formation or organizational capacity of a merchant association.
- The proposed contract amount is \$60,000 for the contract term of January 15, 2009 to September 1, 2009. The contract is between the CEDA – Business Development Services and the OMLF. The City of Oakland Project Manager is – Aliza Gallo.

Technical Assistance, Communications and Outreach

- Convene 7 monthly educational forums for commercial district leaders with presentations on topics pertinent to small businesses and neighborhood commercial districts, including customer service, crime prevention, marketing, information on City of Oakland programs and services, financing, etc. Provide direct merchant-to-city leaders contact and commercial district-to-commercial district networking and communication opportunities.
- Serve as an information and referral resource for commercial district leaders on topics related to merchant organizing, district marketing, promotional event planning, etc. Maintain a call and email log of inquires made and responses provided. Contractor will be responsible for submitting the log with each invoice to City of Oakland.
- Disseminate information through a variety of resources: OMLF website, mailings, telephone, etc., about current topics of importance to commercial districts and small businesses such as upcoming conferences, classes, City Council agenda items, events and business or contracting opportunities. OMLF will use the best communication mechanism to conduct outreach.

Item _____
CED Committee
January 13, 2009

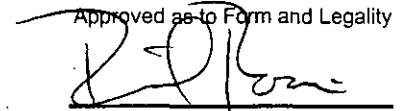
Marketing and Promotion

- Maintain OMLF website to include up-to-date information about coming events hosted by Oakland's neighborhood commercial districts.
- Collaborate with the City's Economic Development and Marketing Divisions on marketing and promotion opportunities. OMLF will follow up on 2008 Shop Oakland – Oakland Grown Campaign to build local merchant interest and increase the number of businesses participating in the Program. OMLF will market District events and develop a spring -summer marketing campaign for Oakland commercial districts.

Formation Support to Merchant Associations & BIDs

- OMLF is responsible for follow up to the two technical assistance efforts for neighborhood commercial districts in East and West Oakland. Contractor will work to enhance merchant associations particularly in the Coliseum Redevelopment Area.
- OMLF's role in the implementation of the Retail Enhancement Strategy by preparing an evaluation of current merchant associations in each of the 53 retail nodes identified in the Strategy. OMLF will be responsible for assisting in the formation of merchant associations or helping to strengthen merchant associations through collaboration with CEDA and the Neighborhood Services Coordinators.
- OMLF will support the City's efforts to facilitate better communication with the existing Community Benefit Districts. OMLF will be assist the City with the operation of the CBD Managers Council.

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Approved as to Form and Legality

Deputy City Attorney

OAKLAND CITY COUNCIL

RESOLUTION No. _____ C.M.S.

A RESOLUTION AUTHORIZING A PROFESSIONAL SERVICES AGREEMENT WITH THE OAKLAND MERCHANT LEADERSHIP FORUM (OMLF) FOR MERCHANT ORGANIZING AND COMMERCIAL DISTRICT SUPPORT SERVICES FOR FY 2008-2009 IN AN AMOUNT NOT TO EXCEED \$60,000, AND ACCEPTING A CONTRIBUTION OF \$18,989 FROM THE REDEVELOPMENT AGENCY UNDER THE COOPERATION AGREEMENT FOR THIS PURPOSE

WHEREAS, there are many neighborhood commercial districts in Oakland that range from thriving and viable to struggling and economically challenged; and

WHEREAS, Oakland residents and visitors appear to be unaware of all the shopping opportunities available in the City; and

WHEREAS, the City has few resources to nurture and build merchant organizations and to market neighborhood commercial districts; and

WHEREAS, increasing merchant participation in the City of Oakland's Shop Oakland campaign is necessary to increase residents' and visitors' awareness of the diversity of shopping opportunities and districts in the City; and

WHEREAS, the City finds and determines that informed and organized merchants are important to the economic health and vitality of Oakland's neighborhood shopping districts, and fostering capacity building of merchants to partner with the City to address issues which impact the viability of their districts can effectively assist both strong and struggling districts; and

WHEREAS, the City finds and determines that the Oakland Merchant Leadership Forum ("OMLF") continues to be uniquely qualified to coordinate development and capacity building of merchant association leaders because it is the only organization in Oakland which is solely focused on supporting the leadership of all neighborhood commercial districts and coordinating merchant organizations' participation in the Shop Oakland marketing; and

WHEREAS, staff will conduct an evaluation of the Oakland Merchant Leadership Forum's performance at the end of the contract term; and

WHEREAS, the Agency is contributing a portion of cost of the agreement to the City related to OMLF's redevelopment-related activities in the Coliseum Redevelopment Project Area; and

WHEREAS, the Agency and the City entered into a Cooperation Agreement on July 1, 2004, which governs the provision of assistance and the payment of funds between the two agencies, including Agency contributions to the City to support redevelopment activities in the Agency's project areas; and

WHEREAS, the City Council finds that the services provided pursuant to the agreement authorized hereunder are of a professional, scientific or technical nature and are temporary in nature; and

WHEREAS, the City Council finds that this contract shall not result in the loss of employment or salary by any person having permanent status in the competitive service; now, therefore be it

RESOLVED: That the City Council hereby authorizes the City Administrator to negotiate and enter into a contract in an amount of \$60,000 for FY 2008-09 with the Oakland Merchant Leadership Forum to plan and convene monthly educational forums for merchant leaders and to coordinate merchant participation in the City's Shop Oakland marketing campaigns; and be it

FURTHER RESOLVED: That funding for this contract will be \$41,011 allocated from General Purpose Fund (1010), Business Development Org (88559), Merchant Organizing Shop Oakland (P275310), Miscellaneous Contract Services (5371 9), Program SC11 and the remaining \$18,989 will come from Fund 7780, Oakland Redevelopment Agency, Business Development Organization (88559), Project (C82620), and Program SC11 Coliseum Redevelopment; and be it

FURTHER RESOLVED: That the City hereby accepts a contribution of funds from the Redevelopment Agency in the amount of \$18,989 under the Cooperation Agreement to help fund this contract; and be it

FURTHER RESOLVED: That the contract shall be approved as to form and legality by the Office of the City Attorney, and a copy shall be kept on file in the Office of the City Clerk.

IN COUNCIL, OAKLAND, CALIFORNIA, _____, 20_____

PASSED BY THE FOLLOWING VOTE:

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

NOES -

ABSENT -

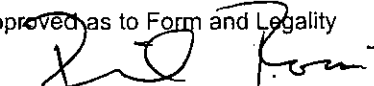
ABSTENTION -

ATTEST: _____

LaTonda Simmons
City Clerk and Clerk of the Council
of the City of Oakland, California

FILED
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OAKLAND
2008 DEC 22 PM 4:18

Approved as to Form and Legality


Agency Counsel

REDEVELOPMENT AGENCY OF THE CITY OF OAKLAND

Resolution No. _____ C.M.S.

AN AGENCY RESOLUTION AUTHORIZING A CONTRIBUTION OF \$18,989 IN COLISEUM REDEVELOPMENT PROJECT FUNDS TO THE CITY UNDER THE COOPERATION AGREEMENT FOR A PROFESSIONAL SERVICES AGREEMENT WITH THE OAKLAND MERCHANT LEADERSHIP FORUM (OMLF) FOR MERCHANT ORGANIZING AND COMMERCIAL DISTRICT SUPPORT SERVICES FOR FY 2008-2009 IN THE COLISEUM REDEVELOPMENT PROJECT AREA

WHEREAS, there are many neighborhood commercial districts in Oakland, including in the Coliseum Redevelopment Project Area, that range from thriving and viable to struggling and economically challenged; and

WHEREAS, Oakland residents and visitors appear to be unaware of all the shopping opportunities available in the City; and

WHEREAS, the City has few resources to nurture and build merchant organizations and to market neighborhood commercial districts; and

WHEREAS, increasing merchant participation in the City of Oakland's Shop Oakland campaign is necessary to increase residents' and visitors' awareness of the diversity of shopping opportunities and districts in the City; and

WHEREAS, the Agency finds and determines that informed and organized merchants are important to the economic health and vitality of Oakland's neighborhood shopping districts, including in the Coliseum Redevelopment Project Area, and fostering capacity building of merchants to partner with the City to address issues which impact the viability of their districts can effectively assist both strong and struggling districts; and

WHEREAS, the Agency finds and determines that the Oakland Merchant Leadership Forum ("OMLF") continues to be uniquely qualified to coordinate development and capacity building of merchant association leaders because

it is the only organization in Oakland which is solely focused on supporting the leadership of all neighborhood commercial districts and coordinating merchant organizations' participation in the Shop Oakland marketing; and

WHEREAS, the City of Oakland desires to enter into a professional services agreement with OMLF in the total amount of \$60,000 for FY 2008-09 to plan and convene monthly educational forums for merchant leaders and to coordinate merchant participation in the City's Shop Oakland marketing campaigns, including merchants in the Coliseum Redevelopment Project Area; and

WHEREAS, the City has requested a contribution from the Agency to fund a portion of the agreement related to OMLF's redevelopment-related activities in the Coliseum Redevelopment Project Area; and

WHEREAS, OMLF's work will assist the Redevelopment Agency in meeting its redevelopment goals in the Coliseum Redevelopment Project area by (1) disseminating redevelopment information about the Coliseum Project Area, (2) assisting in the formation of Business Improvement Districts that will provide additional funding for physical improvements to the Project Area, and (3) improving the operations of merchant businesses in the Project Area and increasing customer patronage of those business, thus keeping them in business and preventing economic blight; and

WHEREAS, the Agency and the City entered into a Cooperation Agreement on July 1, 2004, which governs the provision of assistance and the payment of funds between the two agencies, including Agency contributions to the City to support redevelopment activities in the Agency's project areas; and

WHEREAS, staff will conduct an evaluation of the OMLF's performance at the end of the contract term; now, therefore be it

RESOLVED: That the Agency hereby authorizes a contribution of Coliseum redevelopment project funds in the amount of \$18,989 to the City of Oakland under the Cooperation Agreement to help fund a contract in the total amount of \$60,000 for 2008-09 with the Oakland Merchant Leadership Forum to plan and convene monthly educational forums for merchant leaders and to coordinate merchant participation in the City's Shop Oakland marketing campaigns, including merchants in the Coliseum Redevelopment Project Area; and be it

FURTHER RESOLVED: That: \$18,989 shall be allocated from Fund 7780, Oakland Redevelopment Agency, Business Development Organization (88559), Project (C82620), and Program SC11 Coliseum Redevelopment for this purpose.

IN AGENCY, OAKLAND, CALIFORNIA, _____

PASSED BY THE FOLLOWING VOTE:

AYES - BRUNNER, KERNIGHAN, NADEL, QUAN, BROOKS, REID, KAPLAN, AND
CHAIRPERSON DE LA FUENTE

NOES -

ABSENT -

ABSTENTION -

ATTEST:

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