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OAKLAND

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Approved as to form and legality

*M. Whorson*  
Oakland City Attorney's Office

## OAKLAND CITY COUNCIL

RESOLUTION NO. 83987 C.M.S.

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**RESOLUTION APPROVING THE ANNUAL REPORTS OF THE TEMESCAL/TELEGRAPH AVENUE PROPERTY BUSINESS IMPROVEMENT DISTRICT OF 2005 AND THE LAUREL PROPERTY BUSINESS IMPROVEMENT DISTRICT OF 2005 ADVISORY BOARDS; CONFIRMING THE CONTINUING ANNUAL ASSESSMENT FOR EACH APPLICABLE DISTRICT FOR FISCAL YEAR 2012/13; AND AUTHORIZING PAYMENT OF THE CITY'S CUMULATIVE FISCAL YEAR 2012/13 FAIR SHARE ASSESSMENT IN AN AMOUNT NOT TO EXCEED \$2,218.03 FOR CITY-OWNED PROPERTY IN THE TEMESCAL/TELEGRAPH AVENUE DISTRICT (APN 014 1219 003 00)**

**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 Temescal/Telegraph Avenue Property Business Improvement District of 2005 ("Temescal BID") and the Laurel Property Business Improvement District of 2005 (together, the "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, 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 Temescal BID on July 20, 2004 pursuant to Resolution No. 78730 C.M.S.,
- the Laurel BID on July 19, 2005 pursuant to Resolution No. 79380 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 Temescal BID 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 2012/13 for the Temescal BID; and

**WHEREAS**, the City Council desires to approve and confirm the Reports, and the continuing annual assessments for the Districts for fiscal year 2012/13; and

**WHEREAS**, the City owes a cumulative fiscal year 2012/13 fair share assessment of \$2,218.03 for the following City-owned properties:

<b>District</b>	<b>APN</b>	<b>Site Description</b>	<b>Annual Assessment</b>
Temescal BID	014 1219 003 00	Temescal Library at 5202 Telegraph Avenue	\$ 2,218.03

and

**WHEREAS**, funds to pay the assessments owed by the City have been budgeted in General Purpose Fund (1010)/Economic Development Organization (02981)/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)/Treasury Operations (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 Temescal BID and the Laurel BID were duly appointed by Resolutions of the City Council and have filed their Annual Reports for the 2011/12 and 2012/13 fiscal years as required by law; and be it

**FURTHER RESOLVED** that the Annual Report and the continuing annual assessment for the Temescal BID and for the Laurel BID for the 2012/13 fiscal year are hereby approved, adopted, and confirmed, including a 5% increase in the amount of annual assessments recommended by the Temescal BID Advisory Board, beginning in fiscal year 2012/13 and the City Council does hereby levy and direct the collection of the assessments for the 2012/13 fiscal year in accordance with the assessment formula 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 2012/13 fiscal year assessments for the Districts are as follows:

- Approximately \$293,494.15 for the Temescal BID\*; and
- Approximately \$169,597 for the Laurel BID\*; 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 2012/13 fair share assessment of an amount not to exceed \$2,218.03 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 assessee 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 BIMD Ordinance.

JUL 17 2012

IN COUNCIL, OAKLAND, CALIFORNIA, \_\_\_\_\_, 2012

**PASSED BY THE FOLLOWING VOTE:**

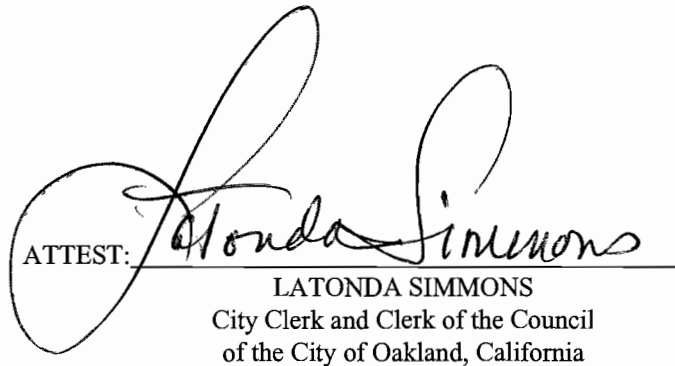
AYES- BROOKS, ~~BRUNNER~~, DE LA FUENTE, ~~WARRICK~~, KERNIGHAN, NADEL, SCHAAF and  
PRESIDENT REID - 6

NOES- 0

ABSENT- Brunner- 1

ABSTENTION- 0

Excused- Kaplan- 1

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

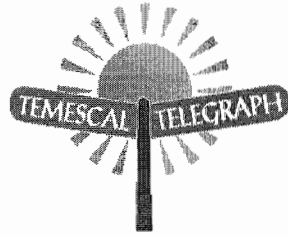
\* These figures represent total assessments to be levied and are greater than estimated revenues contained in the attached *Exhibit A* Temescal and Laurel BID proposed budgets. This is because estimated revenues in the attached budgets deduct an approximate seven to eight percent from total assessments to be levied to account for a projected delinquency rate among assessees in the FY 2012/13 year.

## **EXHIBIT A**

Resolution Approving The Annual Reports Of The Temescal/Telegraph Avenue Property Business Improvement District Of 2005, and The Laurel Property Business Improvement District Of 2005 Advisory Boards; Confirming The Continuing Annual Assessment For Each Applicable District For Fiscal Year 2012/13; and Authorizing Payment of the City's Cumulative Fiscal Year 2012/13 Fair Share Assessment in an Amount Not to Exceed \$2,218.03 for City-Owned Property in the Temescal/Telegraph Avenue District (APN 014 1219 003 00).

Annual Reports for:

- Temescal/Telegraph Avenue Property Business Improvement District Of 2005
- The Laurel Property Business Improvement District Of 2005



**Temescal Telegraph Avenue Community Association (TTCA)  
Business Improvement District  
7<sup>th</sup> Annual Report to City Council  
2011/12**

**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 2011/2012**

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 Public Works and the Councilmember's office.
- Updating Strategic Plan document through 2014, covering organization's priorities, studying boundaries in preparation for renewal in 2014.
- 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 at every opportunity.
- Conducted regular letter and email campaigns to property owners and merchants to inform them of BID activities.
- Temescal featured in following wide circulation media articles:
  - ◆ San Francisco Business Times: "Business improvement districts flourish in nine areas", dated Nov. 25, 2011
  - ◆ San Francisco Chronicle: "Oakland's hip and vibrant Temescal Alley takes off", April 8, 2012
  - ◆ New York Times: "A Workaday Slice of Oakland Branches Out", April 8, 2012.
- TTCA became first certified green BID organization and will encourage more local merchants to pursue certification too as Oakland's greenest neighborhood district.

## **ECONOMIC DEVELOPMENT**

- Maintained updated inventory of Temescal commercial vacancies with a further enhanced module on the website, whereby property owners can post vacancies directly and filled vacancies can be reported online, fully automating the process: [http://www.temescaldistrict.org/commercial\\_vacancies](http://www.temescaldistrict.org/commercial_vacancies). Temescal has minimal vacancies.
- Provided support to new businesses interested in moving into the area. New additions include Arbor Café, and new businesses in the 49<sup>th</sup> Street Alley, including Esqueleto Fine Jewelry, Temescal Alley Barbershop, Crimson and Horticultural Remedies.
- Conducted six Merchant Mixers throughout the year attended on average by 15 - 20 merchants covering various topics including Merchant Watch and Social Media
- Communicated with numerous brokers and prospective tenants regarding vacant spaces
- Administered a merchant survey for feedback as a business retention strategy
- Retail Sales Tax trends continue to increase over previous years, with 2010 bettering 2009 by 7%.

## **DESIGN**

- Changed maintenance vendor (Safety 1<sup>st</sup>) to provide boosted services to include public Right of Way maintenance, landscaping, security and graffiti abatement services. They provide sidewalk sweeping and landscaping five days a week (Wednesday 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; we are increasingly finding the organization compelled to broaden our graffiti services to cover area supposed to be covered in the baseline agreement of services shared by Public Works Keep Oakland Clean.
- Mailed agreements for property owners to participate in graffiti abatement program.
- 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.
- Completed Phase I work on the colorful "Temescal Flows" mural on the 52nd Street overpass, a pedestrian friendly link between Children's Hospital "and Telegraph Avenue.

- Awarded a supplemental \$8,000 Oakland Cultural Arts Grant for phase II of “Temescal Flows”, gateway freeway overpass between Children’s Hospital and Temescal’s Telegraph Avenue (through Artist Alan Leon).
- Pedestrian Lighting Program along Telegraph is being implemented in three phases using reserves, a City grant, and a bank loan. Phase 1 is from 40<sup>th</sup> to 42<sup>nd</sup>; Phase 2 is from 42<sup>nd</sup> north as funding allows. This ambitious endeavor (\$500,000) will enhance security and improve shopper ambience in the commercial district. Temescal will be the first Oakland neighborhood to use LED lights and the BID will be the first in California to leverage its assessment revenue by obtaining bank financing
- Collaborated with City of Oakland on a Temescal Parking Needs Assessment, which included parking strategies, and concluded that parking supply in Temescal is adequate (pre BRT!)
- Partnered with City of Oakland on community meetings to discuss Bus Rapid Transit (BRT)
- Added new banners along Telegraph Avenue incorporating the “Temescal Flows” design theme.
- Advocated for repair of Telegraph between Aileen and 51 to Councilmember Brunner’s office resulting in repavement of Telegraph Avenue
- Installed Lights on Trees on Short Shattuck and on Telegraph between 49<sup>th</sup> and 51<sup>st</sup> and Alcatraz

## **PROMOTION**

- 8<sup>th</sup> annual Temescal Street Fair, lauded as a unique, homegrown event, changed its date to July due to a June rainout. This resulted in increased attendance prompting to make the Sunday after July 4<sup>th</sup> the new date for the event.
- Held successful 6<sup>th</sup> annual safe Temescal Trick or Treat
- Held 4th annual Temescal Street Cinema (six week summer series) as part of nighttime community activity
- Supported 3<sup>rd</sup> Thanksgiving Turkey Trot
- Held 3<sup>rd</sup> annual Taste of Temescal showcasing 20 restaurants and the District’s gourmet ghetto moniker, solidifying nighttime community activity. Event raised \$13,000 for the local schools and non-profits
- Held December Holiday Labyrinth Event with Santa and craft booths, attracting families
- Rejuvenated website with a content management format that also incorporates easy to use social media tools.
- Supported new event – Summer and Winter Temescal Art Hops on First Fridays
- Submitted regular articles to the Temescal News & Views while subsidizing printing efforts for it to continue operations
- 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.
-



### **III. IMPROVEMENTS AND ACTIVITIES BEING CONSIDERED DURING 2012/2013**

#### **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
- Add and also enhance existing trash cans with mosaic utilizing local artist
- Complete second phase of Temescal Flows project on 52<sup>nd</sup> Street underpass.
- Implementing NPI pedestrian lighting grant
- Create a gateway sculpture for placement at the Pennzoil station at the Hwy 24 & 51<sup>st</sup> Street on ramp.
- Help coordinate Phase 2 & 3 of Pedestrian Lighting Project, between City Public Works and PG&E on 51<sup>st</sup> St from Telegraph to Dover, including use of 4<sup>th</sup> bore mitigation funds.
- Complete the second phase of Temescal Flows project on 52<sup>nd</sup> Street underpass by painting the BART columns.
- Advocate to accelerate repavement of 51<sup>st</sup> and Telegraph intersection.
- Continue advocacy for BRT to ensure project addresses the district's concerns about loss of parking and lanes.
- Maintain Banner Rotation Program

#### **PROMOTION**

- Continue to provide regular email communication with stakeholders.
- Conduct 7<sup>th</sup> annual Temescal Trick or Treat
- Hold 5<sup>th</sup> annual Holiday Event to once again include an ice skating rink.
- Conduct 4th "Taste of Temescal" with proceeds going to local non-profits including the local schools' PTAs.
- 5<sup>th</sup> annual Temescal Street Cinema
- Support 4th annual Temescal Thanksgiving Turkey Trot
- Support quarterly First Friday Art Hops
- Maintain renewed website, optimizing use of social media more effectively; get 75 to 100 merchants to post regularly; provide QR codes to the merchants to promote individual websites.

#### **SECURITY**

- Continue Merchant Watch activities maintaining constant email communication with merchants and collaboration with assigned OPD Problem Solving Officer.

#### **ECONOMIC DEVELOPMENT**

- Continue to monitor economic trends in the district and inventory space to remain pro-active about the business mix.

- Continue communications with numerous brokers and prospective tenants regarding vacant spaces, when/ if they arise
- Encourage property owners to post vacancies directly on the website
- Continue to host Merchant Mixers on topics of relevant and local interest
- Continue communications with numerous brokers and prospective tenants regarding vacant spaces

**IV. AN ESTIMATE OF THE COST OF PROVIDING THE IMPROVEMENTS AND THE ACTIVITIES FOR 2012**

Please see attached financial for period covering July 1, 2009 through June 30, 2010.

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

**A 5% increase is proposed for 2012/13 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>
<b>Lot Size</b>	<b>\$0.094954</b>	<b>\$0.057391</b>	<b>\$0.011303</b>
<b>Building Size</b>	<b>\$0.074088</b>	<b>\$0.028526</b>	<b>---</b>
<b>Linear Frontage</b>	<b>\$8.2845</b>	<b>\$1.4359687</b>	<b>\$13.425547</b>

**VI. SURPLUS OR DEFICIT FOR 2011**

Please see attached budget. We had one major expenditure, \$70,000, for the Temescal Flows mural project at the 51<sup>st</sup> Street overpass, in 2011. In 2012, we have begun spending to implement the Pedestrian Lighting Project. 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. These lights are now installed between on Telegraph between 40<sup>th</sup> and 42<sup>nd</sup>.

**VII. THE AMOUNT OF ANY CONTRIBUTION TO BE MADE FROM SOURCES OTHER THAN ASSESSMENTS LEVIED**

The district will continue to explore grant opportunities and other stimulus grants such as the 4<sup>th</sup> Bore mitigation funds for which we have been approved. We have also been approved for a \$110,000 bank loan to support the above Pedestrian Oriented Street

Lighting Program. We are also looking to collaborate with PGE on 52<sup>nd</sup> Street, when they initiate expansion of their substation and sidewalk repair.

The extreme budget stresses at all levels of government make the prospects for additional funding unlikely beyond the aforementioned resources. For the TTBD to execute its highest priority capital project, it is now turning to our own devices. That includes triggering another 5% increase on the 2012 property tax rolls as permitted under the 2004 Temescal Telegraph Avenue Management District Plan.

**TEMESCAL/TELEGRAPH BUSINESS IMPROVEMENT DISTRICT  
2012-2013 BUDGET Proposed**

Assessments	\$274,000	average of last 2 years, plus 5%
interest income	\$500	
<b>Total Allocated revenue</b>	<b>\$274,500</b>	

Program	Pct allocation, proposed budget				
	Zone	1	2	3	Total
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			Zone 1	Zone 2	Zone 3	
			\$ 74,115	\$ 63,135	\$ 13,725	\$ 150,975
Proposed Expenditures						\$ -
Safety 1st			\$ 41,808	\$ 28,392	\$ 7,800	\$ 78,000
Water planters			\$ 3,216	\$ 2,184	\$ 600	\$ 6,000
Landscaping			\$ 6,432	\$ 4,368	\$ 1,200	\$ 12,000
administration			\$ 8,147	\$ 5,533	\$ 1,520	\$ 15,200
loan service on Ped lighting			\$25,728	\$17,472	\$4,800	\$ 48,000
Improvement Mini Grants			\$1,072	\$728	\$200	\$ 2,000
<b>Total Proposed PROWSO Expenditures</b>			<b>\$ 86,403</b>	<b>\$ 58,677</b>	<b>\$ 16,120</b>	<b>\$ 161,200</b>
<b>PROWSO Pro Forma Surplus / (Deficit)</b>			<b>\$ (12,288)</b>	<b>\$ 4,458</b>	<b>\$ (2,395)</b>	<b>\$ (10,225)</b>
<b>MARKETING AND IDENTITY ENHANCEMENT</b>						
Allocated Revenue			\$ 27,450	\$ 6,588	\$ 2,745	\$ 36,783
Proposed Expenditures			\$ -	\$ -	\$ -	\$ -
Temescal Street Fair				\$ -		\$ -
Street Cinema			\$ 1,000			\$ 1,000
December Holiday Event			\$ 4,000	\$ 500	\$ 500	\$ 5,000
Turkey Trot				\$ 250		\$ 250
First Fridays			\$ 1,072	\$ 728	\$ 200	\$ 2,000
Halloween Event			\$ 536	\$ 364	\$ 100	\$ 1,000
Cross-Telegraph Banner			\$ 1,368	\$ 432		\$ 1,800
Website			\$ 2,412	\$ 1,638	\$ 450	\$ 4,500
Exec Directors Fees			\$ 4,502	\$ 3,058	\$ 840	\$ 8,400
<b>Total Proposed Marketing Expenditures</b>			<b>\$ 14,890</b>	<b>\$ 6,970</b>	<b>\$ 2,090</b>	<b>\$ 23,950</b>
<b>Marketing Pro Forma Surplus / (Deficit)</b>			<b>\$ 12,560</b>	<b>\$ (382)</b>	<b>\$ 655</b>	<b>\$ 12,833</b>

6k/mo basic + 500 misc  
500/mo average

<b>ADMINISTRATION</b>							
Allocated Revenue				\$ 35,685	\$ 24,431	\$ 6,588	\$ 66,704
Other							\$ -
<b>Proposed Expenditures</b>							
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				\$ 2,305	\$ 1,565	\$ 430	\$ 4,300
Office Supplies and Other				\$ 1,072	\$ 728	\$ 200	\$ 2,000
Other							
<b>Total Proposed Administration Expenditures</b>				<b>\$ 30,927</b>	<b>\$ 21,003</b>	<b>\$ 5,770</b>	<b>\$ 57,700</b>
<b>Administration Pro Forma Surplus / (Deficit)</b>				<b>\$ 4,758</b>	<b>\$ 3,428</b>	<b>\$ 818</b>	<b>\$ 9,004</b>
<b>CONTINGENCY</b>							
Allocated Revenue				\$ 9,882	\$ 5,765	\$ 4,392	\$ 20,039
<b>TOTAL BUDGETED REVENUE</b>				<b>\$ 147,132</b>	<b>\$ 99,918</b>	<b>\$ 27,450</b>	<b>\$ 274,500</b>
				53.6%	36.4%	10.0%	
<b>TOTAL PROPOSED EXPENDITURES</b>				<b>\$ 132,221</b>	<b>\$ 86,649</b>	<b>\$ 23,980</b>	<b>\$ 242,850</b>
<b>TOTAL PRO FORMA SURPLUS / (DEFICIT)</b>				<b>\$ 14,911</b>	<b>\$ 13,269</b>	<b>\$ 3,470</b>	<b>\$ 31,650</b>

## RESERVES

<b>Change in Reserves, FY12/13</b>		<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Total</b>
(from above)	PROWSO surplus(deficit)	\$ (12,288)	\$ 4,458	\$ (2,395)	\$ (10,225)
	Marketing surplus(deficit)	\$ 12,560	\$ (382)	\$ 655	\$ 12,833
	Administration surplus(deficit)	\$ 4,758	\$ 3,428	\$ 818	\$ 9,004
	Contingency revenue	\$ 9,882	\$ 5,765	\$ 4,392	\$ 20,039
	Sub-Total	\$ 14,911	\$ 13,269	\$ 3,470	\$ 31,650
<b>RESERVES, Prior Years</b>					
(see worksheet)	PROWSO Reserves	\$ 35,751	\$ (15,379)	\$ 20,540	\$ 40,913
	Marketing Reserves	\$ 33,318	\$ 32,813	\$ 8,740	\$ 74,870
	Administration Reserves	\$ 11,490	\$ 23,582	\$ 81	\$ 35,153
	Contingency Reserves	\$ 60,509	\$ 41,305	\$ 18,995	\$ 120,808
	Sub-Total	\$ 141,068	\$ 82,321	\$ 48,356	\$ 271,745
<b>TOTAL RESERVES, FYE 6/30/13 projected</b>					
(before capital expenses)	PROWSO	\$ 23,463	\$ (10,920)	\$ 18,145	\$ 30,688
	Marketing	\$ 45,877	\$ 32,431	\$ 9,395	\$ 87,703
	Administration	\$ 16,248	\$ 27,010	\$ 899	\$ 44,157
	Contingency	\$ 70,391	\$ 47,069	\$ 23,387	\$ 140,847
	<b>Total</b>	<b>\$ 155,979</b>	<b>\$ 95,590</b>	<b>\$ 51,826</b>	<b>\$ 303,395</b>

**PROPOSED EXPENSES AGAINST RESERVES, FY12/13**

		Zone 1	Zone 2	Zone 3	Total
<b>Welcome Sign</b>					
Total Project cost		\$536	\$364	\$100	\$1,000
Current FY Proposed BID expenditure		\$536	\$364	\$100	\$1,000
Future BID expenditure		\$0	\$0	\$0	\$0
<b>Trash Can Mosaics</b>					
Total Project cost		\$5,896	\$4,004	\$1,100	\$11,000
Current FY Proposed BID expenditure		\$5,896	\$4,004	\$1,100	\$11,000
Future BID expenditure		\$0	\$0	\$0	\$0
<b>Gateway Sculpture</b>					
Total Project cost		\$1,072	\$728	\$200	\$2,000
Current FY Proposed BID expenditure		\$1,072	\$728	\$200	\$2,000
Future BID expenditure		\$0	\$0	\$0	\$0
<b>Temescal Flows, two pillars</b>					
Total Project cost		\$1,072	\$728	\$200	\$2,000
Current FY Proposed BID expenditure		\$1,072	\$728	\$200	\$2,000
Future BID expenditure		\$0	\$0	\$0	\$0
<b>Ped oriented lighting, Phase 2</b>					
Total Project cost		\$175,272	\$119,028	\$32,700	\$327,000
Spent prior to current FY		\$0	\$0	\$0	\$0
Anticipated dedicated revenue, CIVIQ		\$0	\$0	\$0	\$0
Loan proceeds		\$58,960	\$40,040	\$11,000	\$110,000
Current FY Proposed BID expenditure		\$116,312	\$78,988	\$21,700	\$217,000
<b>TOTAL Proposed Expenditures Against Reserves</b>		<b>\$124,888</b>	<b>\$84,812</b>	<b>\$23,300</b>	<b>\$233,000</b>

**EXPECTED RESERVES, FYE 6/30/13**      \$ 31,091   \$ 10,778   \$ 28,526   \$ 70,395



## LAUREL DISTRICT ASSOCIATION (PBID) ANNUAL REPORT TO CITY COUNCIL FY 11-12

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

None.

### II. Improvements and Services Provided to Businesses and Property owners in FY 11-12

#### DISTRICT IDENTITY

##### **Best of the East Bay 2011 Award, Increased Sales**

- The Laurel won the “BEST OF THE EAST BAY – Best Completely Re-Imagined Neighborhood” Award from East Bay Express, which highlighted the commercial corridor. We have featured this recognition on all of our current print and online advertising, as well as created and distributed award plaques featured in all of our 100+ businesses.
- Increased Sales - This recognition, as well as our increased emphasis on online marketing and district identity, has contributed to the highest sales-tax revenue totals for the Laurel since 2007, and the third highest total since 2002.

##### **Facebook Marketing and New Website**

- Online Engagement – the LDA focused on establishing and growing an online community specifically interested in events, daily life and business news in the Laurel district. We contracted Hope Solutions Merchant Services (creators of the Oakland Grown Gift Card) to assist us in this effort.
- Facebook Community– 2 different accounts are now very active, updated daily with photos, features and discussions. The “Laurel Street Fair” profile highlights cultural arts and daily culture in the neighborhood, and in 6 months has a following of over 800 friends and is growing daily. The “Laurel District Association” page was recently created, and is being utilized by Laurel businesses as a free and highly effective direct-marketing tool in conjunction with the Laurel Street Fair profile.
- Facebook/Yelp Marketing Trainings for Merchants - With Hope Solutions, we offered 8 online/Facebook merchant technical trainings, signed up 35 merchants to new Facebook accounts, as well as 22 merchants on Yelp. This will be instrumental in helping us with low-cost, effective marketing for the district in the immediate and long-term future.
- New LDA Website - built on a robust programming platform, the website has infrastructure for future efforts like community calendars and multiple news and merchant contributors. The website was visually designed according to our new design guidelines, showcases the Laurel “Leaf” logo, and reinforces the Laurel BID brand.
- “Business Opportunities” listings were added to our website, which features current vacancies, with photos, relevant details and contact info. We actively communicate with property owners of these vacancies, and use the website exposure as a motivational tool for owner participation and façade improvements.

### **Print Advertising**

- We relied heavily this year on online advertising, but also printed approximately 4000 posters and 10000 flyers advertising our events and efforts. In addition, we advertise the LDA to the merchants themselves via notices, flyers and certificates such as the “Best of the East Bay Award.” Currently the award is featured in each of our 100+ businesses.

### **Business Directories**

- New Laurel business directories have been designed and have begun to be distributed locally and throughout greater Oakland. Directories are designed according to our new design motifs and specifications, prominently showcase the Laurel “Leaf” Logo, and reinforce the Laurel BID brand. We will continue to print and distribute through FY 12-13.

### **Street Banners**

- We are in the design phase of creating a new set of 36 street banners for the corridor, to be installed by May 2012. Highlighting Oakland artists and utilizing neighborhood input, these banners emphasize the unique characteristics of the Laurel, informed by the new design guidelines of our marketing efforts.

### **Public Art**

- Creation of 11 new public art pieces on MacArthur Blvd - The commercial corridor now features 19 different pieces of public art since 2009. The pieces have contributed to a drastic reduction in vandalism on the walls they are attached to. For the past 3 years, there has been only 1 minor instance of public art being vandalized. This outlier stands alone in the 206 graffiti tags we’ve abated along the MacArthur corridor in this 1 year.
- Neighborhood Artists - The LDA actively searches for artistic contributions from our own neighborhood, and leverages neighborhood talent to produce pieces at an affordable and sustainable rate. We market the fact that the artwork is locally-produced to the general public, resulting in a two-fold effect of developing neighborhood pride, as well as differentiating our commercial corridor from others in Oakland.
- Laurel “Leaf” logo - All pieces of public art contain or feature the Laurel “Leaf” logo, further emphasizing and establishing a brand identity for the district. We will use this for future family events, such as “scavenger hunts” for schools and families.
- BID Collaboration - We are in open communication with other BIDs to research, develop and promote specific efforts. Working with Koreatown Northgate BID, we were able to create the “Art in Windows” program and promote it to property owners. Through this we have displayed public art in 5 vacancies this year, engaging owners, bringing visual attention to the vacancies, and reinforcing brand recognition for the district.

### **Public Events**

- By July 2012, the LDA will have produced and coordinated 15 public events in a year. This is a marked increase from previous years, and reflects the LDA’s ability to now leverage outside resources, assistance from Councilmember Schaaf’s office, and volunteer merchant and community support in producing events.
- In addition to the annual Laurel Street Fair, Halloween and Lunar New Year Events, we introduced a Laurel Holiday Stroll and Donor Drive, a monthly summer Youth Dance Tournament, as well as the “Summer of Laurel Love” Event Series, which will include car shows, mobile food vending, family-oriented public art days, and artistic performances and preparation dates prior to the Street Fair. We rely heavily on online advertising to promote and report on events, and have built a considerable following through this.
- The Laurel Street Fair this year increased its attendance to 8,000-10,000 people and over 100+ vendors through a strictly grassroots advertising effort. It was widely lauded for its community flavor and atmosphere, and continues to build momentum for FY 12-13. We have also recorded a steady increase in public attendance and participation at events, due in part to our new marketing and community-engagement efforts.



### **Laurel Street Team**

- The Laurel Street Team, comprised of neighborhood youth and adults, have continued to be the on-the-ground communications network between the LDA, the 100+ merchants, and the public. Our Street Team members have not only maintained weekly communications with merchants and promote our efforts, but also assist in coordinating and producing all 15 major public events. For example, the 2011 Laurel Street Fair was entirely produced and run by youth and adults from our Street Team and LDA Staff.

## **PUBLIC RIGHTS OF WAY (PROW)**

### **Maintenance and Landscaping**

- Our street maintenance crew from Peralta Services Corporation abated 206 instances of vandalism, picked up 520 bags of garbage, equaling 10,400 lbs. or 5.2 tons, and recycled 10,400 gallons of used water to keep our beautiful planters vibrant and fresh. They did an entire steam cleaning of the streets, and spot cleaning of target areas such as bus stops.
- We hired a new local resident to help with the maintenance and improvement of plant displays for all of our planters. She works weekly to trim, add and arrange new plants, and has contributed greatly to the visual appearance of MacArthur Blvd.

### **Capital Improvements**

- Tree lights and Tree Trimming - The LDA coordinated a large-scale effort to trim trees and put year-round tree lights in 34 trees between 39<sup>th</sup> Ave and High Street. Over 20 merchants and 7 property owners contributed to this effort by installing outdoor electrical outlets and agreeing to pay for electrical usage. The LDA paid to install and maintain the lights, and matched merchant costs for trimming trees. The lights, coupled with the LDA's previous investment in tripling brightness of pedestrian lamps, have brought a new feel to the shopping areas they are in, and merchants have reported increased evening foot traffic in these areas.
- Façade Improvements - While the LDA did not have its own Façade Improvement program this year, we were the lead facilitators of 4 major City façade improvement projects on the commercial corridor. We were the liaison between property owners and CEDA coordinators, offering guidance and communications assistance in getting their projects approved and in-process.
- Leveraging City Resources – The LDA helped secure City and self-funded architects and designers to design facades and create conceptual sketches for Façade Improvement properties, as well as develop a Design Guidelines document for the entire business district, which we will incorporate into the Laurel Specific Plan. These services were provided free to the BID by the City at a value of \$25,000 in design consultation fees.
- Specific Plan and Design Guidelines - We completed a Phase 1 draft of the development of a Laurel Specific Plan. Covering existing conditions, land use, assets, zoning, vacancies, demographics and traffic studies, this specific plan will be available to property owners and prospective businesses. The Design Guidelines is a part of the Specific Plan, and is currently presented to all merchants and property owners looking to do façade improvements to their properties.

### **Security**

- Crime Reduction on MacArthur Blvd. The implementation of the Laurel Security Ambassadors Program has contributed to a notable reduction in crime on MacArthur Blvd during working hours. The LDA conducted a 3 month sample assessment in 2011: Out of 69 reported crimes throughout the district, only 3 occurred on MacArthur Blvd during Security Ambassador hours, a welcome contrast to crime rates on the corridor in recent years.
- Pro-active Community Collaborations and Projects – We attribute a portion of this reduction to our community engagement strategies for the neighborhood, especially in regards to youth outreach and relationship building. In 2011 the Security Ambassadors sponsored a monthly Dance Tournament for youth. It became a viral YouTube hit (nearing 100,000

views), and attracted local, national and international coverage. The Tournament was well-attended by youth and neighborhood families and was the focus of an MTV documentary. Several dancers from the events were featured on nationally-syndicated shows such as “So You Think You Can Dance,” and “America’s Got Talent.” These accomplishments have strengthened our relationships with local young people, who look upon the events and our collective efforts as a source of neighborhood pride and identification.

- Increased security hours. The LDA increased the number of days for the Security Ambassadors from 4 to 5 (p/t) days a week. This increased the weekly visibility and presence of our Ambassadors on MacArthur Blvd.
- OPD, City Council and City Staff assisted the LDA with a CEPTED evaluation, as well as training to form a Merchant Watch.

## **ORGANIZATION**

### **Merchant Trainings and Communications**

- We continued to conduct monthly merchant meetings, consisting of news updates, event scheduling and planning, security trainings, and specialized online marketing training. Attendance consistently averages 12-15 merchants per meeting.

### **Accounting**

- We hired and continue to work with a contracted accountant, who helps analyze and report our expenditures and income. Earlier in the year we paired the accountant with CEDA staff to streamline a reporting process for all of the Oakland BIDs and BID managers.

### **Board Updates**

- We recruited a new board member in 2011 with extensive public event coordinating experience, and with strong community ties to neighborhood organizations and residents.

### **Community Engagement**

- Online and Neighborhood Survey – we conducted and analyzed a new Laurel customer survey, which we will use towards future targeted business recruitment efforts.
- Handling community concerns – The LDA acted as community liaisons on two extended occasions where the general public voiced widespread concern over incoming businesses. In both cases we coordinated and facilitated communications and agreements between residents, merchants, property owners, and City Council representatives.
- Coordinating Volunteers for Business Attraction – We have been working with resident volunteers on developing a business attraction package for online and print distribution to targeted businesses.
- Community Studies of the Laurel – We maintain our relationship with Mills College Public Policy Department, who has conducted both parking and business attraction studies for the district. These have contributed to the development of our Specific Plan.
- Community Collaborations - Working with Laurel Village Association, Allendale Rec Center, as well as the NCPCs from Allendale and Laurel to help boost recognition and attendance at all our public events and efforts. Created a “Laurel Leaders” community online calendar that details our combined efforts and events.

### III. Improvements And Activities To Be Provided In FY 12-13

#### **DISTRICT IDENTITY**

##### **Facebook Marketing and New Website**

- Continue Online Engagement – maintain 2 Facebook accounts, updating daily with photos, features and discussions. Enlist more merchants to utilize the “Laurel District Association” page as a direct-marketing.
- Continue Facebook/Yelp Marketing Trainings for Merchants
- Expand features of the LDA Website - develop community calendars and multiple news and merchant contributors.
- Enhance “Business Opportunities” listings on our website,.

##### **Print Advertising**

- Maintain current print advertising output, highlighting the “Best of the East Bay Award.”

##### **Business Directories**

- Continue distribution of Laurel business directories have been designed and distributed locally and throughout greater Oakland.

##### **Street Banners**

- Design and produce an additional set of 36 street banners for the corridor by December 2012.

##### **Public Art**

- Create of 5 new public art pieces on MacArthur Blvd. Produce public events that highlight the existing artwork.

##### **Public Events**

- Continue monthly event production, as both producers and marketers of merchant-led events.
- Continue the annual Laurel Street Fair, Halloween, Lunar New Year Lion Dancing, Laurel Stroll and Donor Drive, the “Summer of Laurel Love” Event Series.
- Increase the attendance at the Laurel Street Fair. Projected attendance to be 12,000+ people.

##### **Laurel Street Team**

- Maintain the Street Team Program.

#### **PUBLIC RIGHTS OF WAY (PROW)**

##### **Maintenance and Landscaping**

- Maintain the Maintenance and Landscaping Program

##### **Capital Improvements**

- Tree lights and Tree Trimming – Complete tree lights and trimming for the remainder of trees on MacArthur Blvd.
- Façade Improvements – Continue to assist and encourage City façade improvement projects on the commercial corridor.
- Leveraging City Resources – Continue to seek opportunities to secure City and self-funded expertise in the refinement of the Laurel Specific Plan.
- Specific Plan and Design Guidelines – Complete a second draft of the Laurel Specific Plan. Refine data and analysis on existing conditions, land use, assets, zoning, vacancies, demographics and traffic studies. Continue to share Design Guidelines with prospective and existing business and property owners.

## Security

- Maintain the Laurel Security Ambassador Program, and maintain security hours and efforts.

## ORGANIZATION

### Merchant Trainings and Communications

- Continue to conduct monthly merchant meetings, consisting of news updates, event scheduling and planning, security trainings, and specialized online marketing training.

### Accounting

- Continue to contract.

### Board Updates

- Recruit 2 new board members.

### Community Engagement

- Continue to Present Online and Neighborhood Surveys
- Coordinating Volunteers for Business Attraction – We have been working with resident volunteers on developing a business attraction package for online and print distribution to targeted businesses.
- Continue relationships and projects with Mills College Public Policy Department, Laurel Village Association, Allendale Rec Center, as well as the NCPs from Allendale and Laurel to help boost recognition and attendance at all our public events and efforts. Expand the “Laurel Leaders” community online calendar that details our combined efforts and events.

## IV. An Estimate of the Cost of Providing the Improvements and the Activities for FY 11-13.

See attached budget for details.

## V. Method and Basis of Levying the Assessment

The method and basis of levying the assessment is as follows:

Property Variable	Size	Annual Cost	Building Use Code Applied	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= \$.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

\*This figure represents the projected maximum amount of assessments to be levied in FY 12/13. However, based on actual FY 11-12 receipts the proposed FY 12-13 budget (attached) incorporates an approximate 8% delinquency rate, resulting in projected FY 12-13 receipts of only \$155,280.

## VI. Surplus or Deficit To Be Carried Over From A Previous Fiscal Year

See attached budget for details.

## VII. Contributions from other sources.

See attached budget for details.

<b>Laurel Business Improvement District FY 2012-13 Proposed Budget</b>				
<b>Revenue</b>				
<b>Projected Assessments 2012-2013:</b>	\$ 155,280	( Based on actual assessments rec'd in FY 11/12)		
<b>Anticipated Rollover from FY 11-12</b>	\$ 110,000			
<b>Total BID Balance for FY 2011-12</b>	\$ 265,280			
	<b>FY 11-12 Proposed Expenses</b>			
<b>EXPENSES</b>				
<b>Organization</b>				
Rent				
Staffing				
LDA Manager	\$30,000			
Payroll Expenses	\$0			
Telephone & Fax	\$1,200			
Internet	\$140			
Insurance	\$3,500			
Accounting & Taxes	\$2,500			
Bank Charges/Interest				
Annual Dinner/Merchant Meetings/Memberships	\$1,500			
Office Supplies	\$600			
Postage				
Printing	\$3,000			
Unallocated/Misc				
<b>Subtotal</b>	\$42,440			
<b>DISI General</b>				
Website, Facebook & Graphic Design	\$2,000			
Directory	\$1,000			
Signage/Banners/Artwork/Decorations	\$10,000			
Special Events & Marketing	\$10,000			
Street Festival	\$12,000			
Advertising	\$4,500			
Unallocated				
<b>Subtotal</b>	\$39,500			
<b>PROWSO</b>				
Maintenance and Landscaping	\$50,000			
Capital Improvements	\$20,000			
Security	\$47,943			
Unallocated				
<b>Subtotal</b>	\$117,943			
<b>OTHER</b>				
<b>County Fee (1.7%)</b>	\$2,640			
<b>City Fee</b>	\$500			
<b>City Loan Payment</b>	\$4,000			
<b>Subtotal</b>	\$7,140			
<b>Total Expenses for FY 2011-2012</b>	\$207,022			
Unallocated Reserves for Future FY Activities	\$58,258			
<b>Total Expenses</b>	\$265,280			