



FILED
OFFICE OF THE CITY CLERK
OAKLAND
2015 JUL -2 AM 11:10

AGENDA REPORT

TO: SABRINA B. LANDRETH
CITY ADMINISTRATOR

FROM: Mark Sawicki

SUBJECT: Property-based BIDs Annual Report And
Assessment Payment Approval

DATE: June 12, 2015

City Administrator
Approval

Date

7/1/15

COUNCIL DISTRICT: 1, 2, 3 and 5

RECOMMENDATION

Staff recommends that the City Council adopt:

A Resolution Approving The Fiscal Year 2014-2015 Annual Reports Of The Koreatown/Northgate Community Benefit District Of 2007, The Downtown Oakland Community Benefit District Of 2008, The Lake Merritt/Uptown Community Benefit District Of 2008, The Fruitvale Property Business Improvement District Of 2011, The Lakeshore/Lake Park Business Improvement Management District of 2012, And The Jack London Improvement District Advisory Boards; Confirming The Continuing Annual Assessment For Each Applicable District And For The Temescal/ Telegraph Business Improvement District 2015 For Fiscal Year 2015-2016; And Authorizing Payment Of The City's Cumulative Fiscal Year 2015-2016 Fair Share Assessment In An Approximate Amount of \$217,632.11 For City-Owned Properties In The Koreatown/Northgate District, The Downtown Oakland District, The Lake Merritt/Uptown District, The Fruitvale District, The Jack London District, And The Temescal/Telegraph District 2015

An Oakland Redevelopment Successor Agency Resolution Authorizing Payment Of The Oakland Redevelopment Successor Agency's Cumulative Fiscal Year 2015-2016 Fair Share Assessment In An Approximate Amount Of \$2,973.29 For One Oakland Redevelopment Successor Agency-Owned Property In The Downtown Oakland Community Benefit District of 2008

Item: _____
CED Committee
July 14, 2015

OUTCOME

Adoption of the attached resolutions would approve the annual reports for the Koreatown/Northgate Community Benefit District of 2007 (Koreatown CBD), the Downtown Oakland Community Benefit District of 2008 (Downtown CBD), the Lake Merritt/Uptown Community Benefit District of 2008 (Lake Merritt CBD), the Fruitvale Property Business Improvement District of 2011 (Fruitvale BID), the Lakeshore/Lake Park Business Improvement Management District of 2012 (Lakeshore BID), and the Jack London Improvement District and confirm the continuing annual assessment for each district as well as for the Temescal/Telegraph Business Improvement District 2015 (Temescal BID) for FY 2015-2016, and approve payment of assessments on City and ORSA owned property located within the above districts in an amount of approximately \$217,632.11 for City-owned properties and \$2,973.29 for one Oakland Redevelopment Successor Agency-owned (ORSA) property.

EXECUTIVE SUMMARY

Pursuant to local enabling legislation (Ordinance No. 12190 C.M.S., 1999), City Council-appointed advisory boards for each property-based Business Improvement District (BID), also known as Community Benefit Districts (CBDs), reports must be submitted to the City for review and approval. The reports include any proposed changes to the boundaries of the district, a description of improvements and activities to be provided in the upcoming fiscal year, an estimate of the cost of providing the improvements and activities, the method and basis of levying the assessment, the amount of any surplus or deficit revenues to be carried over from a previous fiscal year, and any contribution to be made from sources other than the levied assessment. Adoption of the attached City resolution would approve the Fiscal Year 2014-2015 annual reports for the Koreatown CBD, the Downtown CBD, the Lake Merritt CBD, the Fruitvale BID, the Lakeshore BID, and Jack London Improvement District (*Exhibit A* to the proposed resolution); confirm the continuing annual assessment for each district for FY 2015-2016 as well as for the Temescal BID; and authorize payment of a cumulative fair share assessment of approximately \$217,632.11 on City property located within the above districts. Adoption of the attached ORSA resolution would authorize payment of a cumulative fair share assessment of approximately \$2,973.29 on ORSA property located in the Downtown CBD.

In FY 2015-2016 the above special assessment districts will collectively generate an estimated \$4,292,359 of special assessment revenues (\$293,481 from the Koreatown CBD; \$1,030,173 from the Downtown CBD; \$1,209,703 from the Lake Merritt CBD; \$340,949 from the Fruitvale BID; \$154,644 from the Lakeshore BID; \$780,793 from the Jack London Improvement District; and \$482,616 from the Temescal BID 2015).

Funds generated will be used to pay for special benefit services outlined in each district's approved Management Plan (on file with the Office of the City Clerk) and annual report (*Exhibit*

Item: _____
CED Committee
July 14, 2015

A). Services include, but are not limited to, private security, sidewalk cleaning, public right of way beautification as well as marketing and promotions, including sponsorship of seasonal special events.

The Fiscal Year 2014-2015 annual reports indicate no changes to the boundaries of any of the districts or to the original method and basis of levying the assessments; however, the Fruitvale BID and the Lakeshore BID advisory boards are requesting allowable percentage increases to the assessments for FY 2015-2016 in the amount of five percent, and two percent respectively.

Because the Temescal BID was formed in FY 2014-2015, the district was not required to submit a FY 2014-2015 annual report. Instead, the district's new Management Plan (approved by City Council per Resolution No. 85148 C.M.S.) contains information that would have otherwise been included in an annual report. Therefore, the attached City resolution does not include approval of a FY 2014-2015 annual report for the Temescal BID. It does, however, confirm the Temescal BID ongoing FY 2015-2016 assessment and authorize payment of a FY 2015-2016 assessment to be levied on one City-owned parcel located in the Temescal BID (the Temescal Library).

BACKGROUND/LEGISLATIVE HISTORY

In 1999, the City Council approved the City of Oakland Business Improvement Management District Ordinance (Ordinance No. 12190, C.M.S.) which allows for the formation of property-based assessment districts to undertake a range of services within the assessment area, independent from government, to further the economic viability of affected commercial neighborhoods.

That same year the Oakland City Council also authorized initiation of the Neighborhood Business Improvement District (NBID) Program (Resolution No. 75323 C.M.S.) to assist neighborhood representatives in their attempts to form business and property-based assessment districts.

Pursuant to the above legislative actions the above special assessment districts were formed as follows:

- The Koreatown CBD on July 17, 2007 pursuant to Resolution No. 80788 C.M.S.
- The Downtown CBD on July 15, 2008 pursuant to Resolution No. 81479 C.M.S.
- The Lake Merritt CBD on July 15, 2008 pursuant to Resolution No. 81478 C.M.S.
- The Fruitvale BID on July 19, 2011, pursuant to Resolution No. 83500 C.M.S.
- The Lakeshore BID on July 17, 2012, pursuant to Resolution No.84004 C.M.S.
- The Jack London BID, July 16, 2013, pursuant to Resolution No. 84534 C.M.S.
- The Temescal BID, July 29, 2014, pursuant to Resolution No. 85148 C.M.S.

Each district was formed for a 10 year term.

Item: _____
CED Committee
July 14, 2015

ANALYSIS

Adoption of the attached resolutions will enable the above special assessment districts to continue providing special benefit services such as private security, maintenance, marketing and promotional activities. These services are intended to improve the conditions and image of the affected business corridors and to stimulate ongoing economic revitalization within the surrounding commercial neighborhood.

Since BIDs are self-initiated, self-funded, and self-administered entities, there are no anticipated fiscal impacts for the City associated with continuance of the above-referenced BIDs other than payment of fair share assessments on City and ORSA property located within the districts (\$217,632.11 and \$2,973.29, respectively). Details of those payments appear below.

Given the approximate \$4,071,754 of private funds that will be leveraged, the above City and ORSA payments may be considered a reasonable and productive expenditure of public funds.

PUBLIC OUTREACH/INTEREST

For the City Council to adopt the attached resolutions, enabling legislation does not require City staff to conduct public outreach other than the required posting on the City's website. District stakeholders, however, did perform outreach necessary to secure advisory board consensus sufficient to generate the attached annual reports and proposed FY 2015-2016 district budgets (*Exhibit A* to the attached City resolution).

COORDINATION

The City Controller's Bureau of the Finance and Management Agency and the Office of the City Attorney were consulted in the preparation of this report and/or its attachments and exhibits.

COST SUMMARY/IMPLICATIONS

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

Item: _____
CED Committee
July 14, 2015

Affected City and ORSA properties are listed in Table 1 below:

Table 1: List of City and ORSA properties subject to FY 2015-2016 BID Assessment Levies

District	APN	Legal Owner	Site Description	Annual Assessment	Fund Source No. *
Downtown Oakland	3-65-9-2	City	551 16th Street (250 Frank Ogawa Plaza Building area)	\$ 27,195.59	1
Downtown Oakland	3-67-3	City	1 Frank H Ogawa Plz. (City Hall)	\$ 31,663.23	1
Downtown Oakland	3-67-2	City	1414 Clay Street (Clay Street Garage)	\$ 1 2,007.55	1
Downtown Oakland	8-619-8-1	City	150 Frank H Ogawa Plz (L. Wilson Building)	\$ 30,094.62	1
Downtown Oakland	8-620-9-3	City	524 16 th Street	\$ 2,369.87	2
Downtown Oakland	2-97-45	City	1327 Broadway	\$ 4,494.83	2
Downtown Oakland	8-641-8-5	City	540 17 th Street (Oakland Ice Rink)	\$ 23,720.35	6
LakeMerritt/ Uptown	8-623-6-1	City	1731 Franklin St. (Franklin St. Garage)	\$ 7,373.22	1
Lake Merritt/ Uptown	8-655-6	City	Grand Avenue	\$ 2,160.67	1
Lake Merritt/ Uptown	10-768-4	City	200 Grand Avenue (Veteran's Memorial Bldg.)	\$ 8,689.34	1
Lake Merritt/ Uptown	8-649-5	City	2025 Broadway (Paramount Theatre)	\$ 4,706.42	1
Lake Merritt/ Uptown	8-635-1	City	274 19 th Street (Snow Park)	\$ 24,695.40	1
Lake Merritt/ Uptown	8-668-4	City	2315 Valdez St.	\$ 2,262.79	2
Lake Merritt/ Uptown	8-668-9-7	City	2330 Webster St.	\$ 3,272.34	2
Lake Merritt/ Uptown	8-649-9	City	490 20 th Street	\$ 1,468.25	2
Koreatown/ Northgate	8-648-16-3	City	2100 Telegraph Avenue	\$ 10,078.55	3
Koreatown/ Northgate	8-649-10	City	2016 Telegraph Avenue	\$ 2,159.46	2

Northgate					
Fruitvale	25-722-26	City	Josie de la Cruz Park	\$ 7,007.70	1
Fruitvale	33-2130-35-2	City	3510 International Blvd.	\$ 678.30	1
Fruitvale	33-2135-26-2	City	Foothill Blvd	\$ 4,134.65	1
Fruitvale	32-2084-51	City	3600 Foothill Blvd	\$ 892.50	1
Fruitvale	32-2115-37-1	City	3566 Foothill Blvd	\$ 549.44	1
Fruitvale	25-719-7-1	City	3050 International Blvd	\$ 2,731.43	1
Fruitvale	32-2084-50	City	3614 Foothill Blvd	\$ 419.83	5
Fruitvale	32-2115-38-1	City	3550 Foothill Blvd	\$ 999.01	5
Jack London	18-425-4-1	City	Embarcadero	\$ 125.55	1
Temescal	14-1219-3	City	5205 Telegraph Ave (Temescal Library)	\$ 1,681.22	1
			CITY TOTAL	\$ 217,632.11	
Downtown Oakland	1-201-10	ORSA	822 Washington Street	\$ 2,973.29	4
			ORSA TOTAL	\$ 2,973.29	
			GRAND TOTAL	\$ 220,605.40	

*See below table for corresponding Fund Source Numbers.

Funds to pay FY 2015-2016 assessments on City and ORSA properties include a combination of the following funding sources in the approximate amounts shown in Table 2 below:

Table 2: List of Funding Sources for Payment of FY 2015-2016 BID Assessments on City and ORSA Properties:

Fund Source No.	Coding Block	Amount
1	General Purpose Fund (1010)/Citywide Activities Organization (90591)/Taxes and Assessments (53511)/Undetermined Project (C138410)/IP50	\$ 166,386.83
2	Central District Projects Fund (5610)/Central District Redevelopment Organization (85245)/ Taxes and Assessments (53511)/ Downtown Capital Project (C339410)/SC13	\$ 16,027.54
3	Multipurpose Reserve Fund (5613)/CIP Central District Organization (94889)/Taxes and Assessments (53511)/Telegraph Plaza (P472710)/SC13	\$ 10,078.55

Item: _____
 CED Committee
 July 14, 2015

4	Central District Fund (9710)/Central District Redevelopment Organization (85245)/Taxes and Assessments (53511)/ Central District Project (S00800)/0000 (ROPS line 105)	\$ 2,973.29
5	Central City East Taxable Bond Fund (5643)/Central City East Redevelopment Organization (85246)/Taxes and Assessments (53511)/Non-Project (0000000)/SC18	\$ 1,418.84
6	Central District Projects Fund (5610)/Central District Redevelopment Organization (85245)/Taxes and Assessments (53511)/Oakland Ice Center Project (P131210)/SC13	\$ 23,720.35

Other than the above assessments, there is no further direct fiscal impact anticipated with adoption of the attached resolutions. Operations in the related business improvement districts are self-funded by the special assessments generated by the districts themselves.

With regard to collection of the assessments, the City Treasury Division will directly bill tax exempt entities, not on the County Assessor's property tax roll. For taxable entities, the County of Alameda will add the assessment as a line item to the annual property tax bill of each affected property owner and remit the amount collected to the City, less the County's collection fee of approximately 1.7 percent of total assessments billed. The City, in turn, will disburse the funds to the district, less a one percent City administrative fee, pursuant to a written agreement between the City and each district's designated non-profit management corporation.

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

SUSTAINABLE OPPORTUNITIES

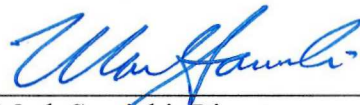
Economic: BID assessments will fund activities which are intended to support the eventual increase of property, sales, and business tax revenues, as well as, increased job opportunities, and on-going economic development of affected commercial districts.

Environmental: Receipt of ongoing special assessment revenue streams will enable applicable districts to continue efforts to strengthen and beautify the physical image of the affected commercial neighborhoods by providing special benefit services such as litter pickup, sidewalk steam cleaning, landscaping, public art, directional signage, and public safety capital improvements.

Social Equity: The above special assessment districts will incorporate members of the affected commercial neighborhood into a productive and proactive entity representing the interests of that community. Stakeholders themselves will administer revenues generated by the district which supports community self-empowerment.

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

Respectfully submitted,



Mark Sawicki, Director

Economic and Workforce Development Department

Prepared by:

Maria Rocha, BID Program Manager

Item: _____
CED Committee
July 14, 2015

FILED
OFFICE OF THE CITY CLERK
OAKLAND

2015 JUL -2 AM 11:10

Approved as to form and legality


Oakland City Attorney's Office

OAKLAND CITY COUNCIL

RESOLUTION NO. _____ C.M.S.

RESOLUTION APPROVING THE FISCAL YEAR 2014-2015 ANNUAL REPORTS OF THE KOREATOWN/NORTHGATE COMMUNITY BENEFIT DISTRICT OF 2007, THE DOWNTOWN OAKLAND COMMUNITY BENEFIT DISTRICT OF 2008, THE LAKE MERRITT/UPTOWN COMMUNITY BENEFIT DISTRICT OF 2008, THE FRUITVALE PROPERTY BUSINESS IMPROVEMENT DISTRICT OF 2011, THE LAKESHORE/LAKE PARK BUSINESS IMPROVEMENT MANAGEMENT DISTRICT OF 2012, AND THE JACK LONDON IMPROVEMENT DISTRICT ADVISORY BOARDS; CONFIRMING THE CONTINUING ANNUAL ASSESSMENT FOR EACH APPLICABLE DISTRICT AND FOR THE TEMESCAL/TELEGRAPH BUSINESS IMPROVEMENT DISTRICT 2015 FOR FISCAL YEAR 2015-2016; AND AUTHORIZING PAYMENT OF THE CITY'S CUMULATIVE FISCAL YEAR 2015-2016 FAIR SHARE ASSESSMENT IN AN APPROXIMATE AMOUNT OF \$217,632.11 FOR CITY-OWNED PROPERTIES IN THE KOREATOWN/NORTHGATE DISTRICT, THE DOWNTOWN OAKLAND DISTRICT, THE LAKE MERRITT/UPTOWN DISTRICT, THE FRUITVALE DISTRICT, THE JACK LONDON DISTRICT, AND THE TEMESCAL/TELEGRAPH DISTRICT 2015

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

WHEREAS, affected property owners petitioned to form the Koreatown/Northgate Community Benefit District of 2007 ("Koreatown CBD"), the Downtown Oakland Community Benefit District of 2008 ("Downtown CBD"), the Lake Merritt/Uptown Community Benefit District of 2008 ("Lake Merritt CBD"), the Fruitvale Property Business Improvement District of 2011 ("Fruitvale BID"), the Lakeshore/Lake Park Business Improvement Management District of 2012 ("Lakeshore BID"), the Jack London Improvement District ("Jack London BID"), and the Temescal/Telegraph Business Improvement District 2015 ("Temescal BID") (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, parking resolution, sidewalk sweeping, economic development, lighting, and marketing activities with the intent of creating a positive atmosphere in the District areas (as more specifically identified in their respective Plans); and

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

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

- the Koreatown CBD on July 17, 2007 pursuant to Resolution No. 80788 C.M.S.;
- the Downtown CBD on July 15, 2008 pursuant to Resolution No. 81479 C.M.S.;
- the Lake Merritt CBD on July 15, 2008 pursuant to Resolution No. 81478 C.M.S.;
- the Fruitvale BID on July 19, 2011 pursuant to Resolution No. 83500 C.M.S.;
- the Lakeshore BID on July 17, 2012 pursuant to Resolution No. 84004 C.M.S.;
- the Jack London BID on July 16, 2013, pursuant to Resolution No. 84534 C.M.S.;
- the Temescal BID on July 29, 2014, pursuant to Resolution No. 85148 C.M.S; and

WHEREAS, the FY 2014-2015 Annual Reports (attached in *Exhibit A*) have been prepared by the District Advisory Boards and filed with the City Clerk; and

WHEREAS, the FY 2014-2015 Annual Report for the Fruitvale BID includes a determination and recommendation by the District Advisory Board for a 5% increase in the amount of the annual assessment beginning in fiscal year 2015-2016 for the Fruitvale BID, which is within the maximum annual assessment increase set forth in the approved plan; and

WHEREAS, the FY 2014-2015 Annual Report for the Lakeshore BID includes a determination and recommendation by the District Advisory Board for a 2% increase in the amount of the annual assessment beginning in fiscal year 2015-2016 for the Lakeshore BID, which is within the maximum annual assessment increase set forth in the approved plan; and

WHEREAS, the City Council desires to approve and confirm the FY 2014-2015 Annual Reports, and the continuing annual assessments for the Districts for fiscal year 2015-2016; and

WHEREAS, the City owes a cumulative fiscal year 2015-2016 fair share assessment of \$217,632.11 for the following City-owned properties:

District	APN	Site Description	Annual Assessment
Downtown CBD	3-65-9-2	551 16th Street (250 Frank Ogawa Plaza Building area)	\$ 27,195.59
Downtown CBD	3-67-3	1 Frank H Ogawa Plz. (City Hall)	\$ 31,663.23
Downtown CBD	3-67-2	1414 Clay Street (Clay Street Garage)	\$ 12,007.55
Downtown CBD	8-619-8-1	150 Frank H Ogawa Plz (L. Wilson Building)	\$ 30,094.62
Downtown CBD	8-620-9-3	524 16 th Street	\$ 2,369.87
Downtown CBD	2-97-45	1327 Broadway	\$ 4,494.83
Downtown CBD	8-641-8-5	540 17 th Street (Oakland Ice Rink)	\$ 23,720.35
Lake Merritt CBD	8-623-6-1	1731 Franklin St. (Franklin St. Garage)	\$ 7,373.22
Lake Merritt CBD	8-655-6	Grand Avenue	\$ 2,160.67
Lake Merritt CBD	10-768-4	200 Grand Avenue (Veteran's Memorial Bldg.)	\$ 8,689.34
Lake Merritt CBD	8-649-5	2025 Broadway (Paramount Theatre)	\$ 4,706.42
Lake Merritt CBD	8-635-1	274 19 th Street (Snow Park)	\$ 24,695.40
Lake Merritt CBD	8-668-4	2315 Valdez St.	\$ 2,262.79
Lake Merritt CBD	8-668-9-7	2330 Webster St.	\$ 3,272.34
Lake Merritt CBD	8-649-9	490 20 th Street	\$ 1,468.25
Koreatown CBD	8-648-16-3	2100 Telegraph Avenue	\$ 10,078.55
Koreatown CBD	8-649-10	2016 Telegraph Avenue	\$ 2,159.46
Fruitvale BID	25-722-26	Josie de la Cruz Park	\$ 7,007.70
Fruitvale BID	33-2130-35-2	3510 International Blvd.	\$ 678.30
Fruitvale BID	33-2135-26-2	Foothill Blvd	\$ 4,134.65
Fruitvale BID	32-2084-51	3600 Foothill Blvd	\$ 892.50
Fruitvale BID	32-2115-37-1	3566 Foothill Blvd	\$ 549.44
Fruitvale BID	25-719-7-1	3050 International Blvd	\$ 2,731.43
Fruitvale	32-2084-50	3614 Foothill Blvd	\$ 419.83
Fruitvale	32-2115-38-1	3550 Foothill Blvd	\$ 999.01
Jack London BID	18-425-4-1	Embarcadero	\$ 125.55
Temescal BID	14-1219-3	5205 Telegraph Ave (Temescal Library)	\$ 1,681.22
		CITY TOTAL	\$ 217,632.11

; and

WHEREAS, it is possible that additional properties will be transferred to City of Oakland ownership during fiscal year 2015-2016, thus increasing the City's fair share assessments; and

WHEREAS, funds to pay the assessments owed by the City will be budgeted as follows:

For assessor parcel numbers 3-65-9-2, 3-67-3, 3-67-2, 8-619-8-1, 8-623-6-1, 8-655-6, 10-768-4, 8-649-5, 8-635-1, 25-722-26, 33-2130-35-2, 33-2135-26-2, 32-2084-51, 32-2115-37-1, 25-719-7-1, 18-425-4-1, and 14-1219-3 funds will be budgeted in General Purpose Fund (1010)/Citywide Activities Organization (90591)/Taxes and Assessments (53511)/Business Improvement District Project (C138410)/IP50
For assessor parcel numbers 8-620-9-3, 2-97-45, 8-668-4, 8-668-9-7, 8-649-9 and 8-649-10 funds will be budgeted in Central District Projects Fund (5610)/Central District Redevelopment Organization (85245)/ Taxes and Assessments (53511)/ Downtown Capital Project (C339410)/SC13
For assessor parcel number 8-648-16-3 funds will be budgeted in Multipurpose Reserve Fund (5613)/CIP Central District Organization (94889)/Taxes and Assessments (53511)/Telegraph Plaza (P472710)/SC13
For assessor parcel numbers 32-2084-50 and 32-2115-38-1 funds will be budgeted in Central City East Taxable Bond Fund (5643)/Central City East Redevelopment Organization (85246)/Taxes and Assessments (53511)/Non-Project (0000000)/SC18
For assessor parcel number 8-641-8-5 funds will be budgeted in Central District Projects Fund (5610)/Central District Redevelopment Organization (85245)/Taxes and Assessments (53511)/Oakland Ice Center Project (P131210)/SC13

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 Koreatown CBD, the Downtown CBD, the Lake Merritt CBD, the Fruitvale BID, the Lakeshore BID, and the Jack London BID were duly appointed by Resolutions of the City Council and have filed their Annual Reports for the 2014-2015 fiscal year as required by law; and be it

FURTHER RESOLVED that the FY 2014-2015 Annual Reports and the continuing annual assessments for the Koreatown CBD, the Downtown CBD, the Lake Merritt CBD, the Fruitvale BID, the Lakeshore BID, the Jack London BID for the 2014-2015 fiscal year are hereby approved, adopted, and confirmed and the City Council does hereby levy and direct the collection of the assessments for the 2015-2016 fiscal year in accordance with the assessment formulas as provided for in the six Annual Reports and the Plans on file with the City Clerk; and be it

FURTHER RESOLVED that the City Council does hereby levy and direct the collection of the assessments for the Temescal BID for the 2015-2016 fiscal year in accordance with the assessment formulas as provided for in the Plan on file with the City Clerk; and be it

FURTHER RESOLVED that the FY 2014-2015 Annual Report and the continuing annual assessments for the Fruitvale BID for the 2015-2016 fiscal year are hereby approved, adopted, and confirmed, including a 5% increase in the amount of annual assessments recommended by the Fruitvale BID Advisory Board, beginning in fiscal year 2015-2016 and the City Council does hereby levy and direct the collection of the assessments for the 2015-2016 fiscal year in accordance with the assessment formula as provided for in the Annual Reports and the Plan on file with the City Clerk; and be it

FURTHER RESOLVED that the FY 2014-2015 Annual Report and the continuing annual assessments for the Lakeshore BID for the 2015-2016 fiscal year are hereby approved, adopted, and confirmed, including a 2% increase in the amount of annual assessments recommended by the Lakeshore BID Advisory Board, beginning in fiscal year 2015-2016 and the City Council does hereby levy and direct the collection of the assessments for the 2015-2016 fiscal year in accordance with the assessment formula as provided for in the Annual Reports and the Plan 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 2015-2016 fiscal year assessments for the Districts are as follows:

- Approximately \$293,481 for the Koreatown CBD; and
- Approximately \$1,030,173 for the Downtown CBD; and
- Approximately \$1,209,730 for the Lake Merritt CBD; and
- Approximately \$340,949 for the Fruitvale BID; and
- Approximately \$154,644 for the Lakeshore BID, and
- Approximately \$780,793 for the Jack London BID, and
- Approximately \$482,616 for the Temescal 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 2015-2016 fair share assessment of an aggregate approximate amount of \$217,632.11 for City-owned property as more specifically described in the recitals above from the General Purpose Fund (1010)/Citywide Activities Organization (90591)/Taxes and Assessments (53511)/Business Improvement District Project (C138410)/IP50 and the Central District Projects Fund (5610)/Central District Redevelopment Organization (85245)/ Taxes and Assessments (53511)/ Downtown Capital Project (C339410)/SC13 and the Multipurpose Reserve Fund (5613)/CIP Central District Organization (94889)/Taxes and Assessments (53511)/Telegraph Plaza (P472710)/SC13 and the Central City East Taxable Bond Fund (5643)/Central City East Redevelopment Organization (85246)/Taxes and Assessments (53511)/Non-Project (0000000)/SC18 and the Central District Projects Fund (5610)/Central District Redevelopment Organization (85245)/Taxes and Assessments (53511)/Oakland Ice Center Project (P131210)/SC13; and be it

FURTHER RESOLVED: That the Agency Administrator is authorized to pay the fair share assessments from the funds listed above for any additional properties located in any of the Districts that are transferred to City of Oakland ownership during fiscal year 2015-2016.

FURTHER RESOLVED that the City Administrator is hereby authorized to enter into contracts and related amendments with any nonprofit corporation comprised of the assesses themselves designated by the owners through the Advisory Boards for the Districts for the security, marketing, maintenance, or other activities and improvements for the Districts, or at the request of the owners through the Advisory Boards to conduct or contract for such services and improvements as provided for in the BIMD Ordinance.

IN COUNCIL, OAKLAND, CALIFORNIA, _____, 2015

PASSED BY THE FOLLOWING VOTE:

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

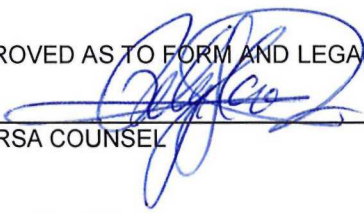
NOES-

ABSENT-

ABSTENTION-

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

FILED
OFFICE OF THE CITY CLERK
OAKLAND
2015 JUL -2 AM 11:10

APPROVED AS TO FORM AND LEGALITY:
BY: 
ORSA COUNSEL

OAKLAND REDEVELOPMENT SUCCESSOR AGENCY

RESOLUTION No. - _____

A SUCCESSOR AGENCY RESOLUTION AUTHORIZING PAYMENT OF THE OAKLAND REDEVELOPMENT SUCCESSOR AGENCY'S CUMULATIVE FISCAL YEAR 2015-2016 FAIR SHARE ASSESSMENT IN AN APPROXIMATE AMOUNT OF \$2,973.29 FOR ONE OAKLAND REDEVELOPMENT SUCCESSOR AGENCY-OWNED PROPERTY IN THE DOWNTOWN OAKLAND COMMUNITY BENEFIT DISTRICT OF 2008

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

WHEREAS, affected property owners petitioned to form the Downtown Oakland Community Benefit District of 2008 ("Downtown CBD") ("District") under said legislation to undertake the Management Plans for the District ("Plan") which is on file with the City Clerk; and

WHEREAS, the Plan provides for enhanced services such as new security, crime prevention, beautification, parking resolution, sidewalk sweeping, economic development, lighting, and marketing activities with the intent of creating a positive atmosphere in the District area (as more specifically identified in its Plan); and

WHEREAS, the Plan was prepared in accord with the provisions of the law overseeing the formation of the District as referenced above, and has been filed with the City; and

WHEREAS, pursuant to the requirements of the law, the Downtown CBD was established on July 15, 2008, pursuant to Resolution No. 81479 C.M.S.; and

WHEREAS, the Oakland Redevelopment Successor Agency owes a cumulative fiscal year 2015-2016 fair share assessment of \$2,973.29 for the following Successor Agency-owned property:

District	APN	Site Description	Annual Assessment
Downtown Oakland	1-201-10	822 Washington Street	\$ 2,973.29

and

WHEREAS, it is possible that additional properties will be transferred to Oakland Redevelopment Successor Agency ownership during fiscal year 2015-2016, thus increasing the Successor Agency's fair share assessments; and

WHEREAS, funds to pay the assessment of affected Oakland Redevelopment Successor Agency-owned property located in the Downtown CBD will be budgeted in Central District Fund (9710)/Central District Redevelopment Organization (85245)/Taxes and Assessments (53511)/ Central District Project (S00800)/0000 (ROPS line 105); **now, therefore be it**

RESOLVED; that the Oakland Redevelopment Successor Agency hereby authorizes payment of the assessment for the one Successor Agency-owned property located in the Downtown CBD as described above in an aggregate amount of approximately \$2,973.29 for the 2015-2016 fiscal year assessment period from the Central District Fund (9710)/Central District Redevelopment Organization (85245)/Taxes and Assessments (53511)/ Central District Project (S00800)/0000 (ROPS line 105); and be it

FURTHER RESOLVED: That the Agency Administrator is authorized to pay the fair share assessments from the fund listed above for any additional properties located in any of the Districts that are transferred to Oakland Redevelopment Successor Agency ownership during fiscal year 2015-2016.

IN SUCCESSOR AGENCY, OAKLAND, CALIFORNIA, _____, 2015

PASSED BY THE FOLLOWING VOTE:

AYES- BROOKS, CAMPBELL WASHINGTON, GALLO, GUILLEN, , KALB, KAPLAN, REID and
CHAIRPERSON GIBSON McELHANEY

NOES-

ABSENT-

ABSTENTION-

ATTEST: _____
LATONDA SIMMONS
Secretary of the Oakland
Redevelopment Successor Agency

Exhibit A

To The Resolution Approving The Fiscal Year 2014-2015 Annual Reports Of The Koreatown/Northgate Community Benefit District Of 2007, The Downtown Oakland Community Benefit District Of 2008, The Lake Merritt/Uptown Community Benefit District Of 2008, The Fruitvale Property Business Improvement District Of 2011, The Lakeshore/Lake Park Business Improvement Management District of 2012, And The Jack London Improvement District Advisory Boards; Confirming The Continuing Annual Assessment For Each Applicable District And For The Temescal/ Telegraph Business Improvement District 2015 For Fiscal Year 2015-2016; And Authorizing Payment Of The City's Cumulative Fiscal Year 2015-2016 Fair Share Assessment In An Approximate Amount of \$211,718.44 For City-Owned Properties In The Koreatown/Northgate District, The Downtown Oakland District, The Lake Merritt/Uptown District, The Fruitvale District, The Jack London District, And The Temescal/Telegraph District 2015

Annual Reports for the:

- Koreatown/Northgate Community Benefit District of 2007
- Downtown Oakland Community Benefit District of 2008
- Lake Merritt/Uptown Community Benefit District of 2008
- Fruitvale Property Business Improvement District of 2011
- Lakeshore/Lake Park Business Improvement Management District of 2012
- Jack London Improvement District



2633 Telegraph Avenue, Oakland, CA 94612

KOREATOWN NORTHGATE COMMUNITY BENEFIT DISTRICT ANNUAL REPORT TO THE CITY COUNCIL – 2014

1. Proposed Changes in the Boundaries of the CBD or in any Benefit Zones within the District:

There are no proposed changes in the boundaries of the KONO (Koreatown Northgate) CBD for the coming year. There is only one benefit zone in the existing district.

2. Improvements and Activities Provided During Calendar Year 2014:

Organization

- Represented the district through participation on the Oakland Merchants Leadership Forum and the Oakland Business Improvement District Council.
- Hold monthly community Board meetings and committee meetings to discuss concerns, solutions and new projects.
- Recruited new Board members with representation from community, property owners, and business owners.
- Recruited new committee members for each KONO committee to assure community involvement.
- Maintained separate committee budgets for each committee to allow for a more efficient process in project implementation and track spending for each committee.
- Assumed lead in the organization and production of the Oakland First Fridays monthly event.
- Worked with other BIDs / CBDs managers and the City to help shape more district friendly policies, meet with key city staff, share resources and best practices and create a common voice to address problems and offer solutions which affect every district.
- Kept stakeholders, merchants and consumers updated on the CBD activities through email, website, Facebook, and Twitter.

- Handled all the day to day activities including monitoring all the financials and reviewing the budget each month.
- Set agendas, recorded minutes, and sent out announcements for all Board and Committee meetings.
- Processed payroll and all Board members' reimbursements.
- Created and distributed 151 annual Board recruitment letters to property owners.
- Fielded 500 calls per year and 20,500 emails from stakeholders, business owners, city staff, and residents for an average of 41 calls per month and 1,708 emails per month. (From gmail report).
- Provide property owners and business owners' letters of support upon request and review.
- Attended appreciation dinner for the Day Reporting Center.
- Utilized the Mayor's Summer Jobs Program and brought on a student to update the KONO online business directory.
- Hired new Executive Assistant (part-time) to split hours between KONO and Oakland First Fridays event.
- Updated property owner information with January 2014 Alameda County data.
- Attended BALLE (Business Alliance for Local Living Economies) Conference
- Assisted business owners to connect with appropriate City of Oakland Departments.
- Interviewed by reporter from Oakland Local for article on BID/CBD's about what they are and what they do.
- Held a KONO one day Board of Directors retreat.
- Spoke at Oakland City Council regarding proposed legislation of ground floor commercial vacancy registration.
- Collaborated with Bike East Bay and City of Oakland to accelerate the repair of potholes in the district.
- Executive Director spoke on a panel for the Federal Reserve Bank of San Francisco about the benefits of BIDs/CBDs and about KONO.

Security & Operations (includes public right of way beautification)

- The Board continued to provide enhanced security services to reduce crime and disorder in the district by continuing the contract with Safety1st, a private security and maintenance company;
- The Safety1st has abated 340 incidents of graffiti on both public and private properties so far this year (Jan-Sept 2014) for a **25% increase in graffiti incidents from last year**.
- The Safety1st ambassadors walk the district daily and have picked up 2,180 bags of litter so far this year (Jan-September 2014) with an average of 242 bags per month for a **40% increase** from last year due to increased foot traffic in the district and the Oakland First Friday event.

- The Safety1st has picked up six and a quarter tons of illegally dumped items of bulky waste and transported to the dumps so far this year (Jan-Sept. 2014) with an average of just over one half ton per month.
- The Safety1st has responded to 520 calls for service from merchants in the district with an average of 58 calls per month.
- The Safety1st has reported problems to public works department through email, phone calls and the "See Click Fix" program with an average of 15 issues per month.
- Organized multiple neighborhood clean-up days to remove stickers from parking meters, light polls, pick up litter, weed tree wells, and paint out graffiti.
- Worked with the Pollinator Posy organization to install five bee and butterfly friendly planter boxes in KONO as a beautification project to improve the public right of way.
- Maintained the art murals on all the utility boxes in the district in an effort to abate graffiti and increase the districts identity as an arts destination.
- Hired six artists to repair or repaint their art box due to damage from excessive tagging.
- Attended all Neighborhood Crime Prevention Council (NCPC) meetings in an effort to reduce the number of crime incidents in the district and communicate with the PSO (Problem Solving Officer) and the beat 8X officer the district's concerns and problems.
- Held KONO Security & Operations committee meetings to discuss security issues focused specifically in the KONO district.
- Continued to emphasize the priorities with PSO officer to focus on the drug dealing on 23rd & 24th at Telegraph Avenue and the auto break-ins.
- Worked with property owners and business owners to encourage more murals in the district as an abatement tool for graffiti.
- Provided Port-a-Potties, security service and clean up the first Friday of every month for the First Friday event.
- Report any problems with the City **litter containers** in the district to the Public Works department.
- KONO worked with OPD and Alta Bates Summit to reduce the number of service calls.
- Meeting with City of Oakland to discuss illegal dumping at City Parking lot at 22nd and Telegraph Ave.
- Able to get "adopt-a-planter" agreements signed and recruit new business owners to care for five new flower planters in the district.
- Met with FBI to discuss credit card data security for small businesses and the KONO repeat vandalism.
- Installed new alarm system in the KONO office.
- Collaborated with the Broadway Valdez neighborhood security council to discuss strategies to combat the excessive car break-ins and the issue of underreporting.
- Co-coordinated Neighborhood Clean-up Day, Jan 25 with Councilmember Lynnette MacElhaney. Breakfast sponsored by Sutter Hospital; planted 30 new plants; cleaned up two pick-up trucks of trash; hosted over 50 volunteers, painted out graffiti; and removed stickers.

- Working with Sarah Kidder to create an Emergency Safety Plan for the First Friday Event.
- Working with City of Oakland Area 2 Response team to create an asset map of the area.

Marketing & Identity

- KONO commissioned six artists to re-paint damaged utility boxes in the district.
- Updated the online business directory with new businesses, photos for each business, hours of operation and product information.
- Provide community and stakeholders with district updates through email blasts and quarterly newsletters.
- Boosted the number of “likes” on the KONO Facebook page to 305, a 20% increase from last year.
- Created new way-finding banners for the art galleries and the Parkway Theater.
- Worked with property owner and artist to place art in a vacant commercial storefront in an effort to beautify the district and help fill the vacancy by making the space more attractive.

Oakland First Fridays Event

- Contracted with event fundraiser / coordinator Sarah Kidder.
- KONO has taken the lead to produce the Oakland First Friday event each month and working towards making the event self-sustaining.
 - Obtained sponsorship from **15** sponsors for a total of **\$6,865.00** in income revenue to support the event.
 - Obtained \$58,091.00 in cash donations to support the Oakland First Friday event.
 - Met with Art Murmur to discuss collaboration on the marketing of the Oakland First Friday Event and Art Murmur event.
 - Filed the fictitious business name for Oakland First Fridays Events; opened a separate bank account for all income and expenses for the event; received a City of Oakland Business tax certificate; and a California Sales permit.
 - Pulled all the permits each month, provided port-a-potties, contracted with a traffic management company to close the streets, contracted with a private security company to provide security in collaboration with OPD, hangs no parking signs each month, debriefs with OPD before and after each event, and works closely with the City of Oakland’s Marketing and City Administration departments.
 - Set up a website with an online application system for vendors.
 - Successfully recruited xx sponsorships for the event.
 - Redesigned the event layout with approval from OPD and Oakland Fire Department.
 - Created limited edition Oakland First Friday T-shirts to diversify the revenue streams to help support the event.
 - Held an open town hall First Friday meeting at the KONO office to get feedback and ideas from the community.
 - Obtained California’s sellers permit for Oakland First Friday T-shirt sales

- Obtained Oakland Business License and filed fictitious business name for Oakland First Fridays.

Economic Development

- Reduced the **commercial vacancy** rate from 46% in 2011 down to 25% in 2012 and down to 12% in 2013 and to 10% in 2014.
- Updated the vacancy database list in August 2014.
- Actively worked to recruit new businesses to the district.
- Promoted grand openings of new businesses through KONO email and social network.
- Promoted City of Oakland planning department's meetings to the community to discuss

Telegraph transportation plans.

- Applied for a community grant for a KONO Community Garden Project at 22nd & Telegraph.
- Worked with assistant to produce two minute video, fill out application and create a time line.
- Contacted City of Oakland to explore feasibility of community garden on city property.
- Conducted phone meeting with potential partner organization

(City Slicker Farms, WOW Farms, NoMad Gardens etc).

- Worked with intern from San Francisco State MPA program who is focusing on Urban administration and Community Economic Development to draft a commercial ground floor vacancy registration ordinance for Oakland.
- Worked with Victoria Swift to create press release for completed Economic Impact Report on the Oakland First Friday event. Successfully received five media articles: Oakland Local, KQED, East Bay Express, SF Gate, Bay Area Business Talk, Oakland Wiki.
- Worked to mediate dispute between existing business and new business coming into KONO.
- Alerted KONO business owners and property owners about new tenant and facade grants available from the City of Oakland.
- Collaborated with Bike East Bay to create a demonstration of a protected bike lane in the KONO district on Bike to Work Day.
- Connected book author/artist with vacant property owners in KONO for pop-up book release event in September.
- Contacted representative for new Smart Parking Meters and invited to speak at Board.
- Assisted in promotion of Green LEEF workshops; entrepreneurial training.

3. Activities planned for FY 2015:

Organization

- KONO will work with Sierra Club to **replace the all broken or damaged trees** in the district this fall 2015.
- The Executive Director will continue to produce a regular newsletter to keep the community and the property owners informed of the CBD's activities.

- The Executive Director will continue to keep stakeholders, merchants and consumers updated on the CBD activities through email, website, Facebook, and Twitter.
- Work with City Economic & Workforce Development department to obtain a Master Encroachment permit for the KONO district.

Security & Operations (includes public right of way beautification)

- ∅ The Security and Operations Committee will continue its involvement with the Neighborhood Crime Prevention Council meetings and work closely with the PSO officer to accomplish top three priorities.
- ∅ The KONO Board of Directors will continue to run the Oakland First Fridays Event and will partner with the City of Oakland, OPD, and the Art Murmur organization in an effort to assure the popular event will remain clean, safe, and viable.
- ∅ KONO will seek out more **grant opportunities** to fund **murals** as a positive graffiti abatement tool in this popular art district.
- ∅ KONO will continue to work with Public Works and Code Compliance to **abate blighted properties** in the district.
- ∅ KONO will continue to work to increase the number of **bike racks** in the district.
- ∅ KONO will continue to mediate solutions between residents and businesses in the community that cause disturbances.

Marketing & Identity

- ∅ The M&I Committee will continue to work on the following Marketing & Identity projects:
- ∅ Produce a district promotional video.
- ∅ Create quarterly newsletters, email blasts and social media announcements.
- ∅ Create more permanent plaques for the utility art boxes.
- ∅ Work with business owners to market them through the KONO website by providing one-on-one instructions as well as group workshops.

Economic Development

- ∅ KONO will continue to work to reduce the districts vacancy rate by 20% in the next year.
- ∅ KONO will work to accelerate the economic development process through deliberate actions, by creating partnership with property owners; conducting community outreach to determine what types of businesses will be supported by the residents; locating and placing a “good fit” type of business into a vacancy; and providing extensive marketing once the businesses are opened, in an effort to increase the businesses chance of survival and create stability for the property owners and the district.
- ∅ KONO will continue to work with the Planning Commission to assure new developments are appropriate for the district.

Ø KONO will explore the feasibility of a new **Community Garden** in the district between Broadway and Telegraph at 22nd street.

Ø KONO will continue to work with LocalOn to strategize on getting more merchants to use the free postings on the website.

4. Estimated Cost of Providing the Improvement and Activities for 2015:

See attached budget.

5. Method and Basis for Levying the Assessment:

Budget: The upcoming year annual budget is projected to be \$293,481, minus a small amount built in for uncollected assessments.

<i>Benefit Zone</i>	<i>Linear Frontage First Year Annual Costs</i>	<i>Lot Square Footage First Year Annual Costs</i>	<i>Building Square Footage First Year Annual Costs*</i>	<i>Single Family Residents Annual Cost, per Parcel**</i>
1	\$5.30	\$0.1061	A -\$0.1273 B -\$0.0849 C -\$0.0530 D -\$0.0000 E -\$0.0000 F -\$0.0530	\$ 387.23

APPORTIONMENT OF BUILDING USES:

(Each Parcel and its building use have been categorized in the district. Some Special Benefit Services are allocated to specific building uses, other building uses are exempt from payment into that specific service, based upon anticipated benefit)

<i>Building Use Code</i>	<i>Description of Use</i>
A	Retail space, hotels, motels, visitor related, retail condos
B	Office and Commercial uses, office or commercial condos, Independent, free

	standing parking structures
C	Industrial/Manufacturing/Distribution
D	Institutional (City, County, Water District, School, public utility, parks, etc.)
E	Church, non-profit, tax-exempt
F	Multi-Unit Residential
G	Single Family residential/Condo units - \$ 387.23 flat fee per year, once parceled. The parcels, on which condos have been built, will have the individual property owners assessed only for the condo unit, and will be exempted from lot size, building size and linear frontage. Retail or commercial condos will be assessed as category "A" or "B" building use, and will use all three property variables (lot size, linear frontage and building use) factored in their assessments.

EXPLANATION OF HIGHER ASSESSMENTS BASED UPON BUILDING USE:

Single family residential units/condos, will be assessed a flat annual assessment, regardless of floor level or size of unit. Once single family residents/condos have been parceled in the future mixed-use developments, an annual flat condo fee will be apportioned to underwrite and increase the SOBO portion of the budget to provide those new residents with cleaning services, public rights of way beautification and possible supplemental security.

Commercial or retail condos will be assessed on the same multi-variable basis as other parcels in the district. Buildings or land use will be assessed based upon the impact those land uses have on the public rights of way. All parcels will be assessed equally on the basis of linear frontage and lot size, however the land use or building will determine the amount that parcel is assessed in total, in other words, buildings will be assessed differently based upon their anticipated benefit from establishment of the CBD. Retail land uses, - restaurants, bars, coffee shops, liquor stores, drug stores, nail salons, etc. - or those land uses that benefit from increased walk-in traffic, will pay a higher annual assessment per square foot of retail building space, when compared to office, commercial, industrial or multi-family land uses. Only retail and visitor related land uses would be assessed for the marketing and promotions aspects of the CBD budget. Building square footage assessments for development projects would be adjusted during the demolition and construction phases.

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

As of the beginning of the district fiscal year commencing January 1st 2015, the anticipated surplus and carry forward funds will be \$48,000.

7. Amount of Any Contributions to be made From Sources other Than Assessments Levied.

The KONO CBD anticipates \$75,000 to \$100,000 in vending fee and sponsor revenue from the Oakland First Fridays event. However the cost of the event is estimated between \$150,000 and \$300,000 for the year. KONO anticipates the city services costs will be covered through special event funding provided by the City of Oakland.

KONO 2015 Proposed Budget

Assessment Revenue		2015	2014 Carry fwd	Total
100%	Collections	\$ 293,481.00	\$ 48,000.00	\$ 341,481.00
86%	Actual Collections estimated	\$ 250,926.26		
2%	Reserve	\$ (5,445.25)		
	Prior year bal - Carry forward	\$ 48,000.00		
Total Assessment Revenues		\$ 293,481.01		

Expenses		2015	Percentages
Security & Operations		\$ 175,000.00	59.6%
Marketing & Identity		\$ 37,000.00	12.6%
Admin & Corp operations		\$ 71,000.00	24.2%
Contingency/city fees/reserves		\$ 10,481.00	3.6%
Total		\$ 293,481.00	100.0%

Total should be \$341,481 which is
\$293,481 (per Treasury Division latest assessment roll) plus \$48K of 2014 carryforward



2014 ANNUAL REPORT TO THE CITY OF OAKLAND

Downtown Oakland Association
388 19th Street, Oakland, CA 94612
info@downtownoakland.org
510-238-1122

1. Proposed Changes in boundaries of the CBD:

There are no proposed changes to the boundaries of the CBD.

2. Improvements and activities provided during fiscal year 2014:

The District Management Corporation continues to have no employees and contracts out all services.

A. The Sidewalk Operations Beautification and Order (SOBO) Committee:

\$665,204.00 was allocated for SOBO related activities in 2014. Martin Ward of PS&I Old Oakland Associates and Michelle Lane of Old Oakland co-chair the SOBO committee. The key elements of the work of this committee are summarized as follows:

I. Ambassadors/Safety:

The district contracts with Block by Block (BBB) who provides safety ambassador services. The services provided by BBB include, but are not limited to, walking and bike patrols, safety and umbrella escorts, pedestrian and motorist assistance, acting as a witness to crimes, and deterring panhandling and loitering. BBB receives approximately \$30,000 per month from our organization and is operated under the on-site supervision of Operations Manager Ted Tarver, working out of the CBD office.

DOWNTOWNOAKLANDASSOCIATION

II. Ambassador/Maintenance:

The district contracts with Peralta Service Corporation (PSC) to provide maintenance ambassador services. The services provided include but are not limited to street sweeping and pressure washing of the sidewalks, the watering of plants, the removal and abatement of litter, urine, feces, graffiti, and any other object that obstructs the public rights of way. In 2014, DOA added a full time landscaping staff person to maintain the beautification projects installed throughout the district. This individual is employed by PSC. PSC receives approximately \$21,000 per month from our organization and is operated under the on-site supervision of Operations Manager Rick Williams, working out of the CBD office.

B. District Identity and Streetscape Improvement Services (DISI) Committee:

\$58,500.00 was allocated for DISI related activities in 2014. Sara May of Metrovation chairs the committee. The following represents the work of the DISI Committee:

I. Public Relations:

In 2013, the Downtown Oakland Association re-bid the Public Relations contract and selected Gallen.Neilley & Associates Inc. to provide public relations services. Gallen.Neilley & Associates receives \$2,500 per month for their services.

II. Social Media:

The district has accounts with Facebook, Twitter, Hootsuite, Constant Contact, Gmail, Flickr, and LocalOn who hosts our website.

III. Branding and Marketing:

In 2014, under the direction of the DISI Committee chairs, the district embarked on an effort to refocus its priorities relating to branding and marketing of the district. The strategic plan includes developing and managing a clear, articulated brand for Downtown and Uptown Oakland, overseeing an overall communication effort to the public, including developing criteria and expectations for work of contracted PR firm, determining key activities or programs to attract businesses,

including broker and other influencer outreach and developing criteria and objectives for sponsorships & partnerships.

IV. Sponsorship of events:

In 2014, the Downtown Oakland Association has sponsored Art and Soul, Bike to Work Day, Art Murmur, Love Our Lake Day and the Oakland Music Festival. Also in 2014, we will sponsor the Plaid Friday campaign in coordination with Oakland Grown.

C. Organization (ORG) Committee:

\$206,392.49 was allocated to the ORG Committee in 2014. The ORG Committee is responsible for the oversight of all administrative tasks.

I. Administration for 2014:

Oakland Venue Management (OVM) has been the principle administrator for the district. OVM employs four individuals, three full-time and one part-time, who manage various duties including the creation of financial reports, the scheduling and facilitating of board and committee meetings, board nominations and elections, maintaining public records, relations with the City of Oakland, community relations, biannual newsletters, monthly email blasts, and oversight of contractors.

II. Annual Stakeholder Meeting:

ORG funds our Annual Stakeholder Meeting, held on June 12, 2014. This is a public meeting, noticed to all district property owners by mail as required in Section 5.10.1 in the Disbursement Agreement between the DOA and the City of Oakland.

III. Business Attraction and Retention:

ORG funds programs that promote the attraction of retail businesses and fill empty spaces in the district. This includes the sponsorship of 2.Oakland.

IV. The Free B Shuttle:

In 2014 the ORG committee gave \$18,000 of sponsorship funds to the Free B Shuttle.

3. The improvements and activities to be provided for the fiscal year 2015:

A. The Sidewalk Operations Beautification and Order (SOBO) Committee:

We plan to continue providing Ambassador and beautification services as outlined for the current year. We will continue to maintain the projects we have set in motion including the hanging plants, street planters, BART planters, medians, and Latham Square, in coordination with the city.

B. District Identity and Streetscape Improvement Services (DISI) Committee:

Our district identity and streetscape improvement services will continue in 2015 as they were outlined for the current year, with an emphasis on the creation of a new website.

I. Sponsorship of events:

The Downtown Oakland Association will likely suspend temporarily the sponsorship of events in 2015 while we work to optimize the implementation of our marketing and branding strategy.

C. The following special benefits will be prioritized over the next year or two:

- I. Retail Attraction and Blight Abatement
- II. Urban Ecology and Beautification Projects
- III. Promoting Oakland as a Technology and Green Business Hub
- IV. Resources for Oakland's Active Retirees (ROAR)
- V. Youth Internship and Job Training Opportunities
- VI. Repairing public amenities
- VII. Landscaping medians throughout the districts
- VIII. Public Space Development

4. It is estimated that it will cost \$1,036,383.93 to provide the improvements and activities described above in the 2015 calendar year. This amount includes our projected 94% assessment collection amount of \$968,362.30 plus our prior year carry forward of \$119,897.30 and less our budgeted reserve of \$51,875.67. Please see the attached budget.

5. The method and basis for levying the assessment is based upon a benefit unit analysis. In this process, linear frontage, lot size and building square footage data is used to calculate individual parcel assessments. Two benefit zones are used to apportion special benefit services based upon need. Further details regarding the methodology used can be found in the District Management Plan, pages 24 through 34. The District requested a 5% assessment increase for both fiscal years 2014 and 2015, both of which were approved by City Council. The District Management Plan can be found in full on file with the Office of the City Clerk.

6. It is estimated that the Downtown Oakland Association will have carry-forward totaling \$119,897.30 which includes the prudent and budgeted 5% reserve and unanticipated assessment income received.

7. The Downtown Oakland Association received approximately \$650.00 in non-assessment income in 2014 through donations collected for our annual event and continues to seek out potential funding opportunities. At this time we are unaware of any non-assessment income to be received in fiscal year 2015.

**Downtown Oakland Association
 2015 Annual Budget**

	<u>Annual Budget</u>
Ordinary Income/Expense	
Income	
Assessment Revenue	
100% Collection	1,030,173.00
Assessment Revenue - 94% Collection (Reserve)	968,362.30 -51,875.67
Prior Year Bal - Carry Forward	119,897.30
Total Assessment Revenue	<u>1,036,383.93</u>
Total Income	1,036,383.93
Expense	
DISTRICT IDENTITY (DISI)	
DISI Projects	
Banner Program	3,000.00
Marketing	42,500.00
Misc	2,539.55
Public Relations	15,000.00
Total DISI Projects	<u>63,039.55</u>
Special Events	
Arts & Culture	5,000.00
CBD Sponsored Events	5,500.00
Total Special Events	<u>10,500.00</u>
Total DISTRICT IDENTITY (DISI)	73,539.55
ORGANIZATION	
Non-Personnel Expenses	
Accounting Expenses	3,000.00
Computer Service & Support	500.00
Consulting and Legal Expenses	4,999.00
Fees & Permits	2,000.00
Insurance	
Directors & Officers	1,300.00
General Liability	3,530.00
Total Insurance	<u>4,830.00</u>
Misc	4,189.65
Occupancy expenses	
Rent, parking, other occupancy	38,500.00
Total Occupancy expenses	<u>38,500.00</u>
Office furniture & equipment	1,500.00

Downtown Oakland Association
2015 Annual Budget

	<u>Annual Budget</u>
Postage, shipping, delivery	500.00
Printing & copying	3,000.00
Supplies	3,500.00
Telephone & telecommunications	2,500.00
Total Non-Personnel Expenses	69,018.65
ORG/Special Projects	
Annual Breakfast Meeting	5,500.00
Business Attraction & Retention	1,000.00
Shuttle	8,000.00
Total ORG/Special Projects	14,500.00
Personnel & Related	
Public Relations	15,000.00
Staff Personnel	130,949.56
Training & Prof. Development	4,000.00
Total Personnel & Related	149,949.56
Total ORGANIZATION	233,468.21
SOBO	
Landscaping Staff Person	19,594.00
Maintenance	222,480.00
Misc SOBO expenses	17,897.92
PROW Maintenance	60,000.00
Security	391,743.25
Watering	17,661.00
Total SOBO	729,376.17
Total Expense	1,036,383.93
Net Ordinary Income	0.00
Net Income	0.00



LAKE MERRITT/UPTOWN
COMMUNITY BENEFIT DISTRICT

2014 ANNUAL REPORT TO THE CITY OF OAKLAND

Lake Merritt/Uptown District Association

388 19th Street, Oakland, CA 94612

info@Lakemerritt-uptown.org

510-452-4529

1. Proposed Changes in boundaries of the CBDs:

There are no proposed changes to the boundaries of the CBD.

2. Improvements and activities provided during fiscal year 2014:

The District Management Corporation continues to have no employees and contracts out all services.

A. The Sidewalk Operations Beautification and Order (SOBO) Committee:

\$847,181.00 is allocated for SOBO related activities in 2014. Michelle Lane of the Cathedral of Christ the Light chairs the SOBO committee. The key elements of the work of this committee are summarized as follows:

I. Ambassadors/Safety:

The district contracts with Block by Block (BBB) who provides safety ambassador services. These services include, but are not limited to, walking and bike patrols, safety and umbrella escorts, pedestrian and motorist assistance, acting as a witness to crimes, and deterring panhandling and loitering. BBB receives approximately \$40,000 per month from our organization and is operated under the on-site supervision of Ted Tarver, working out of the CBD office.

LAKE MERRITT UPTOWN ASSOCIATION

388 19th Street • Oakland, California 94612

Phone 510.452.4529 • Fax 510.452.4530 • info@lakemerritt-uptown.org • www.lakemerritt-uptown.org

II. Ambassador/Maintenance:

The district contracts with Peralta Service Corporation (PSC) for maintenance ambassador services. The services provided include, but are not limited to, street sweeping and pressure washing of the sidewalks, the watering of plants, the removal and abatement of litter, urine, feces, graffiti, and any other object that obstructs the public rights of way. In 2014, the district added a full time landscaping staff person to maintain the beautification projects installed throughout the district. This individual is employed by PSC. PSC receives approximately \$26,000 per month from our organization and is operated under the on-site supervision of Rick Williams, working out of the CBD office.

B. District Identity and Streetscape Improvement Services (DISI) Committee:

\$63,500.00 was allocated for DISI related activities in 2014. Andrea Kirkpatrick of the Swig Company chairs the committee. The following represents the work of the DISI Committee:

I. Banner Program:

The districts, in partnership with the City of Oakland, installed new banners along the historic Broadway Auto Row in 2014, celebrating the architecture and entertainment and dining opportunities in the Uptown.

II. Public Relations:

In 2013, the Lake Merritt/Uptown District Association re-bid the Public Relations contract and selected Gallen.Neilley & Associates Inc. to provide public relations services. Gallen.Neilley & Associates receives \$2,500 per month for their services.

III. Social Media:

The district has accounts with Facebook, Twitter, Hootsuite, Constant Contact, Gmail, Flickr, and LocalOn who hosts our website.

IV. Branding and Marketing:

In 2014, under the direction of the DISI Committee chairs, the district embarked on an effort to refocus its priorities relating to branding and marketing of the district. The strategic plan includes developing and managing a clear, articulated brand for Uptown and Downtown Oakland, overseeing an overall communication effort to the public, including developing criteria and expectations for work of contracted PR firm, determining key activities or programs to attract businesses, including broker and other influencer outreach and developing criteria and objectives for sponsorships & partnerships.

V. Sponsorship of events:

In 2014, the district sponsored Art and Soul, Bike to Work Day, Art Murmur, Love Our Lake Day and the Oakland Music Festival. Also in 2014, we will sponsor the Plaid Friday campaign in coordination with Oakland Grown.

C. Organization (ORG) Committee:

\$206,954.76 was allocated to the ORG Committee in 2014. The ORG Committee is responsible for the oversight of all administrative tasks.

I. Administration for 2014:

Oakland Venue Management (OVM) has been the principle administrator for the district. OVM employs four individuals, three full-time and one part-time, who manage various duties including the creation of financial reports, the scheduling and facilitating of Board and committee meetings, Board nominations and elections, maintenance of public records, relations with the City of Oakland, community relations, biannual newsletters, monthly email blasts, and oversight of contractors.

II. Annual Stakeholder Meeting:

ORG funds our Annual Stakeholder Meeting. This is a public meeting, noticed to all district property owners by mail as required in section 5.10.1 in the Disbursement Agreement between the LMUDA and the City of Oakland.

III. Business Attraction and Retention:

ORG funds programs that promote the attraction of retail businesses and fill empty spaces in the district. This includes the sponsorship of 2.Oakland.

IV. The Free B Shuttle:

In 2014 the ORG committee gave \$18,000 of sponsorship funds to the Free B Shuttle.

3. The improvements and activities to be provided for the fiscal year 2015:

A. The Sidewalk Operations Beautification and Order (SOBO) Committee:

We plan to continue our Ambassador and beautification programs in the year 2015 as outlined for the current year. We will continue to maintain the projects we have set in motion including the hanging plants, street planters, BART planters, and medians, in coordination with the city.

B. District Identity and Streetscape Improvement Services (DISI) Committee:

Our district identity and streetscape improvement services will continue in 2015 as they were outlined for the current year, with an emphasis on the creation of a new website.

Sponsorship of events:

The district will likely suspend temporarily the sponsorship of events in 2015 while we work to optimize the implementation of our marketing and branding strategy.

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

- I. Retail Attraction and Blight Abatement
- II. Urban Ecology and Beautification Projects
- III. Promoting Oakland as a Technology and Green Business Hub
- IV. Resources for Oakland's Active Retirees (ROAR)
- V. Youth Internship and Job Training Opportunities
- VI. Repairing public amenities
- VII. Landscaping medians throughout the districts
- VIII. Public Space Development

4. It is estimated that it will cost \$1,242,955.83 to provide the improvements and activities described above in the 2015 calendar year. This amount includes our projected 94% assessment collection amount of \$1,137,146.95 plus our prior year carry forward of \$234,398.42 and less our budgeted reserve of \$128,589.54. Please see the attached budget.
5. The method and basis for levying the assessment is based upon a benefit unit analysis. In this process, linear frontage, lot size and building square footage data is used to calculate individual parcel assessments. Two benefit zones are used to apportion special benefit services based upon need. Further details regarding the methodology used can be found in the District Management Plan, pages 20 through 27. The District requested a 2.9% assessment increase for both fiscal years 2014 and 2015, both of which were approved by City Council. The District Management Plan can be found in full on file with the Office of the City Clerk.
6. It is estimated that the Lake Merritt/Uptown District Association will have carry-forward totaling \$234,398.42 which includes the prudent and budgeted 10% reserve and unanticipated assessment income received.
7. The Lake Merritt/Uptown District Association received approximately \$650.00 in non-assessment income in 2014 through donations collected for our annual event and continues to seek out potential funding opportunities. At this time we are unaware of any non-assessment income to be received in fiscal year 2015.

Lake Merritt Uptown District Association
 2015 Annual Budget

	<u>Annual Budget</u>
Ordinary Income/Expense	
Income	
Assessment Revenue	
100% Collection	1,209,730.00
Assessment Revenue - 94% Collection	1,137,146.95
(Reserve)	-128,589.54
Prior Year Bal - Carry Forward	234,398.42
Total Assessment Revenue	<u>1,242,955.83</u>
Total Income	1,242,955.83
Expense	
DISTRICT IDENTITY (DISI)	
DISI Projects	
Marketing	42,500.00
Misc	4,057.12
Public Relations	15,000.00
Total DISI Projects	<u>61,557.12</u>
Special Events	
Art & Soul	0.00
Arts & Culture	5,000.00
CBD Sponsored Events	5,500.00
Total Special Events	<u>10,500.00</u>
Total DISTRICT IDENTITY (DISI)	72,057.12
ORGANIZATION	
Non-personnel expenses	
Accounting Expenses	3,000.00
Computer Service & Support	500.00
Consulting & Legal Expenses	4,999.00
Fees & Permits	2,000.00
Insurance	
Directors & Officers	1,300.00
General Liability	4,887.00
Total Insurance	<u>6,187.00</u>
Misc	4,008.20
Occupancy expenses	
Rent, parking, other occupancy	38,500.00
Total Occupancy expenses	<u>38,500.00</u>
Office furniture & equipment	1,500.00

Lake Merritt Uptown District Association
2015 Annual Budget

	<u>Annual Budget</u>
Postage, shipping, delivery	500.00
Printing & copying	3,000.00
Supplies	3,500.00
Telephone & telecommunications	2,500.00
Total Non-personnel expenses	<u>70,194.20</u>
ORG/Special Projects	
Annual Breakfast Meeting	5,500.00
Shuttle	5,000.00
Total ORG/Special Projects	<u>10,500.00</u>
Personnel & Related	
Public Relations	15,000.00
Staff Personnel	130,930.00
Training & Prof. Development	4,000.00
Total Personnel & Related	<u>149,930.00</u>
Total ORGANIZATION	230,624.20
SOBO	
Landscaping Staff Person	28,196.00
Maintenance	274,651.00
Misc SOBO expenses	38,601.72
PROW Maintenance	65,490.07
Security	510,335.72
Watering	23,000.00
Total SOBO	<u>940,274.51</u>
Total Expense	<u>1,242,955.83</u>
Net Ordinary Income	<u>0.00</u>
Net Income	<u><u>0.00</u></u>



Fruitvale Property Business Improvement District 2014 Annual Report to the City of Oakland with Budget Projections for the 2015 Calendar Year

FBID Overview

The Fruitvale Business Improvement District (FBID) is a comprehensive neighborhood commercial revitalization program focused on the International Boulevard and Fruitvale Avenue (Zone 1) and Foothill Boulevard (Zone 2) commercial corridors. Daily maintenance and beautification improvements are aimed at increasing economic activity and celebrating community assets. At the start of the program in 2001, commercial property owners voted to adopt a FBID to continue revitalization efforts started under the Main Street Program. In 2006, owners renewed their commitment to supporting revitalization activities for an additional five years. The BID currently supports upwards of 390 businesses throughout the Fruitvale district

The FBID continues the work of the Main Street Program, a successful model developed by the National Trust for Historic Preservation that addresses five components of revitalization: safety and cleanliness, economic development, design, promotion, and community organizing. Overall achievements include completing over 200 façade improvements, creating public art and streetscape improvements, offering business assistance for local merchants, and coordinating daily sidewalk cleaning, as well as tree and flower planting. Additionally, the FBID team serves as a liaison with the City of Oakland, reporting safety hazards that otherwise would go unchecked and unrepaired. This includes reporting blight and maintenance needs, and organizing full neighborhood cleanups in conjunction with the City of Oakland, including park and Earth Day cleanups and creek maintenance.

The itemized budget at the end of this report outlines how the Property Assessment Funds are allocated and lists the eligible costs covered by Assessment Funds. All other services mentioned are supplementary and accomplished by Unity Council staff and fundraising efforts. The FBID is able to provide promotional, safety and neighborhood activities with the generous contributions/grants of organizations such as The Unity Council, LISC (Local Initiative Services Corporation), and NeighborWorks America to name a few. Much of the neighborhood beautification efforts (such as tree and flower planting) would not be possible without partnerships with Urban Releaf, The Home Depot, Orchard Supply Hardware and Keep Oakland Beautiful to name some of the many organizations that contribute to Oakland's beautification projects. We appreciate both property and business owners for solely covering the cost for any and all façade improvements. We thank our numerous partner organizations for the multitude of ways in which they support the Fruitvale Business Improvement District and look forward to continued partnerships for a thriving district.

The Fruitvale Business Improvement District (FBID) contract was renewed for ten years and began on January 1, 2012. We continue having quarterly Property Owner meetings to inform them of relevant issues in the community and receive feedback.

1. Any proposed changes in the boundaries of the BID or in any benefit zones within the district. There are no proposed changes to the boundaries of the FBID or benefit zones within the district.

2. Improvements and activities provided during calendar year 2014 (January 1-December 31)

The FBID participated in all the following events by organizing or playing a substantive participation roll in the activities. Improvements and activities during the calendar year are as such:

Commercial Corridor Maintenance

Peralta Service Corporation (PSC); the maintenance crew for the Fruitvale Business Improvement District (FBID) provides more than 160 hours per week (excluding Sundays and holidays) to both areas 1 and 2 of the FBID. Removal of illegally posted flyers and posters, and reporting and removal of illegal dumping are performed throughout the entire FBID. Area 1 includes additional maintenance of sidewalk, sidewalk power wash, curb, and gutter sweeping, recycling, and graffiti abatement. The cleaning crew and their daily performance in the neighborhood are widely recognized by the merchants and residents in the FBID.

- *Sidewalk Hot Spots Power Wash- April-May 2014*
The most trafficked areas were power washed to make the annual power washing easier. We thank Peralta Service Corporation for their work.

Below are numbers of services performed throughout the FBID:

- Graffiti cleaned in Zone 1: 402
- Graffiti in Zone 2 (merchants were given written and verbal warnings to clean up graffiti, some were reported to Public Works): 842
- Illegal dumping collected in Zone 1: 46
- Reports of pot holes, cracked sidewalks, etc throughout the FBID.: 72
- Illegal flyers and posters removed: 237

Community Clean Ups

Groups of volunteers comprised of various Fruitvale members come together for community clean up events throughout the year to improve the quality of life and to beautify the Fruitvale neighborhood. Community clean ups consist of uprooting weeds, collection of street debris, restoring public fixtures, surveying, and planting around various locations including heavily trafficked intersections and parks. During the calendar year, a total of 265 volunteers participated in organized clean ups in the Fruitvale. Below are names of events, dates and descriptions that occurred throughout the calendar year.

- *38th Avenue Clean-Ups- March 1, April 5, May 3, June 7, 2014*
What began as 2-4 neighbors joining forces with Monte Sinai Church has grown to a proud group of about 8-10 neighbors. Meeting the first Saturday of every month, the neighbors were organized by the Unity Council who saw an opportunity to engage folks around the issue of neighborhood cleanliness. Pastor Juan of Monte Sinia has agreed to be the lead as long as the Unity Council organizes and supports the neighbors. With tools from the City of Oakland and occasional coffee/pastry donations, folks gather for about 3 hours of dedicated cleaning for an up kept street.
- *Global Youth Service Day- April 12, 2014*
Over 35 youth from all over California joined us for a serious Cesar Chavez Park revamp. The popular park received a repainting and a thorough washing on plastic surfaces to eliminate graffiti. Additionally, the Community Garden was started, which began with clearing away a truckload of compost to make way for garden boxes. Youth ranging from 3-

25 years also had the opportunity to create art that will decorate the community garden- the most effective graffiti abatement strategy we have found thus far. We are deeply grateful to Acme Bread, Starbucks, the City of Oakland and Parks and Rec for assisting!

- *Earth Day- April 26, 2014*
As a registered Earth Day Site, Cesar Chavez Park received much needed maintenance. 32 community, youth and visiting volunteers followed the work of Global Youth Service Day by cleaning the creek and picking up countless cigarette butts, 5 bags of trash, including some mattresses and 2 bags of compost. We thank Councilmember Noel Gallo and his staff for participating and bringing some volunteers.
- *NeighborWorks Week Two Part Clean Up- June 7, June 14, 2014*
In honor of National NeighborWorks Week, the FBID conducted a two day, multifaceted project to clean and beautify the community. June 7 in congruence with the 38th Avenue neighbors which allowed the Cesar Chavez Park and Annex to receive much needed attention, retrieving 6 bags of trash and 2 of compost. June 14 gave 35th Avenue a thorough clean up with the help of 30 community volunteers, collecting over 10 bags of compost and 5 of trash. With bagels from Noahs, coffee from Starbucks and tools from the City of Oakland, volunteers were energized and didn't stop until the area was clean. We thank NeighborWorks America for their continued dedication to our communities!
- *Foothill Succulent Garden- September 27, October 11, 2014*
With the changing weather the FBID team decided to redevelop a patch of dirt in front of 4100 Foothill Blvd by converting it into a Succulent Garden. The first day involved cleaning up the patch by removing litter, weeds and getting the area ready with 10 volunteers. The second day consisted of 8 volunteers giving the area a light clean up and the planting.
- *Plaza Park Clean Up- December 6, 2014*
In preparation for the Fruitvale Christmas Tree Lighting, 10 volunteers helped us spruce up Fruitvale Plaza Park and collected 5 bags of trash.

Safety Activities

Over the course of the calendar year, FBID has implemented efforts to improve the issue of safety and decrease crimes around the Fruitvale commercial corridors. Below are descriptions of safety related events and activities that the FBID organized, assisted, or attended:

- *Neighbor Crime Prevention Council Meetings (NCPC) – Ongoing*
Through NCPC, Unity Council works very closely with the Neighborhood Service Coordinator Ana M. Martinez, Problem Solving Officer Jorge Pereda, Captain Tull and staff from Councilmember Noel Gallo, concerning issues that affect the commercial and residential areas. NCPC has a strong volunteer steering committee who attends meetings at the City Council on issues that affect the community. NCPC meetings represent beat areas 20X, 23X, 24X with a consistent turnout of approximately 20 to 30 attendees each month. As a result of the monthly meetings, residents and merchants are reporting and working on different projects for a thriving Oakland.
- *Monthly Merchant Meetings:*
The Monthly Merchant Meetings (MMM) are generally held on the last Wednesday of the month and are focused around different issues in an effort to keep business owners more

aware and engaged. Below are descriptions of the meetings that have been conducted with the help of various community organizations. Some months experienced 2 meetings with the upcoming Bus Rapid Transit Project being an issue of high concern for the International commercial corridor. In January 2014, 9 Merchant Captains were established to give active roles for further engagement and leadership development.

- *Monthly Merchant Meeting- January 29, 2014*
The first meeting of the year was jam packed with information around the Bus Rapid Transit Project, useful community resources and a presentation around the Dear John Project which has been used in the San Antonio District to mitigate the prostitution issue. The project, which targets pimps, seeks to rehabilitate victimized women.
- *Monthly Merchant Meeting- February 11, 2014*
The February meeting was called as an emergency meeting to address the current needs of business owners. Many merchants along the International corridor (some outside the FBID district) received letters/claims from a “Richard MacBride” lawyer whom despite being Bar approved, appears to have a non-existent court record. The letters claim that the recipient business was not ADA compliant and businesses had the choice of being taken to court or giving MacBride \$4,000 to drop the charges. While we acted as fast as we could, seeking help from the City of Oakland as well as community organizations, for some businesses we were too late. With the help of the Center for Independent Living and attorney Robert Borelle, we were able to clarify the Americans with Disabilities Act for merchants, as well as providing useful information as to how they can contest MacBride.
- *Monthly Merchant Meeting- March 25, 2014*
With the technological era developing rapidly, we saw a need in the FBID for technical assistance so businesses can stay more engaged and aware of their surroundings. March featured a communications workshop, teaching business owners email and Facebook basics for better communication.
- *Monthly Merchant Meeting- May 21, 2014*
There was no April meeting because May featured a two part workshop hosted by the American Red Cross. The workshop, normally done over a 4 hour period, was around emergency preparedness and how businesses would continue and support Fruitvale/Oakland in the case of a natural disaster. Attendees of both workshops received an “Emergency Duffel Bag” for their businesses which contained roughly \$250.00 worth of useful supplies ranging from a whistle, to an emergency blanket, to packaged food and water for several days.
- *Monthly Merchant Meeting- May 28, 2014*
The second part of the American Red Cross Emergency Preparedness Workshop made business owners think on their feet and draft an emergency plan for their businesses. We are deeply grateful to the Red Cross for all their work!
- *Monthly Merchant Meeting- June 25, 2014*
June served as a follow up for our January meeting around the Dear John Project. With the help of Lieutenant Kevin Wiley, merchants were given a deeper understanding of the current progress around the issue of prostitution. With a change from incarceration to rehabilitation, prostitution mitigation efforts now target those

in charge of human trafficking, seeking to eliminate the root of the issue. Prostitutes themselves are now treated as the victims they are and while OPD is hard at work, there is much to do in Oakland. Merchants agreed to stay connected, engaged and support in any way they can, particularly advocating for more officers working towards the rehabilitation of victimized women.

- *Monthly Merchant Meeting- July 10, 2014*
With the Bus Rapid Transit Project due to start in 2015, the FBID team saw a need for business owners to be well informed and invited the BRT team to give a thorough presentation with visuals as to how the project would impact Fruitvale. Councilmember Noel Gallo joined us for this special meeting as well as OPD.
- *Monthly Merchant Meeting- July 30, 2014*
July featured an outdoor meeting with presentations by Oakland Police Department and Self Defense Instructor Rita Garza. OPD reported on the most recent crimes and scams, as well as tips on how to be safe especially after dark. Folks really enjoyed the opportunity to ask questions on this sensitive subject.
- *Monthly Merchant Meeting- August 27, 2014*
With the popular Dia de los Muertos around the corner, the FBID team focused the meeting on Dia and the promotional benefits of the festival.
- *Monthly Merchant Meeting- September 30, 2014*
With the end of the year busy with events, the FBID team decided September would be one of the last meetings of the year. We ended with a bang and took business owners on a Business Excursion and Idea Tour through different business districts of Oakland.
- *Monthly Merchant Meeting- November 18, 2014*
The FBID team decided that if other districts have an official Christmas Tree Lighting, why not Fruitvale? The last Merchant Meeting of the Month was a planning meeting for the holiday festivities and to thank the businesses that make Fruitvale the vibrant community that it is.
- *Illegal Gambling petition- January-February 2014*
“Get Connected” was an “internet café” that served as a hub for illegal activity which encouraged minors to gamble. We gathered over 300 signatures, testimonies of businesses that got robbed by patrons of “Get Connected” and a letter to the California Gambling Commission and even went to City Council. Finally this nefarious business was closed and City Council initiated a resolution to not allow “online gambling” to be legal in Oakland.
- *Safety Neighborhood Ambassadors Program (SNAP) –ongoing but reduced*
Unity Council in coordination with Peralta Corporation Services (PSC), an affiliate of Unity Council, continues its efforts to combat crime and increase safety in the neighborhood with its program, Safety Neighborhood Ambassador Program (SNAP). The ambassadors patrol the entire FBID area and are identified in visible blue and yellow uniform. Ambassadors are bilingual in English and Spanish and are made available to residents, merchants and visitors in the neighborhood. Unfortunately, funding ran out for 8 of the 10 ambassadors; the remaining 2 are extremely appreciated and merchants see the good that the ambassadors did. Due to funds, the Ambassador program officially ended in August 2014.

- *Neighborhood Patrol Group- Street Light Repair Reports- April 29, 2014*
In an effort to increase safety in the BID, a yearly walkthrough of the commercial corridors is done after dark to report broken/malfunctioning lights. With the help of a couple dedicated volunteers and business owners, we were able to report 10 lights that needed maintenance throughout the FBID- an all time low!
- *Emergency Contact Distribution- June 14, 2014*
In congruence with National NeighborWorks Week, we saw this as an opportunity to engage business owners and residents. Over 400 sheets were distributed to all the neighbors of 35th Avenue, between International Blvd and Foothill Blvd, as well as neighboring businesses. The sheets were printed in English and Spanish, containing useful City numbers, as well as The Unity Council's contact information.
- *Community Meetings; October 15, October 16, 2014*
2 community meetings were hosted to see how folks perceived Fruitvale assets, areas that need help, and crime. These meetings were hosted with the intent to see where more art was needed in the area and proved to be highly effective in assessing Fruitvale.
- *Neighborhood Patrol Group- Street Light Repair Reports- October 29, 2014*
With the help of 12 volunteers, we were able to conduct a second walkthrough of the district. Separated into 2 groups, we walked the FBID perimeter and discovered over 15 bulbs out, most of which were in Cesar Chavez Park. While we walked, Officer Jorge Pereda drove around the FBID.

Beautification Projects and Façade Improvements

Our beautification projects contribute to the overall improvement and revitalization of the Fruitvale district. Beautification projects foster a sense of community unity, and serve as a deterrent for further vandalism, graffiti and blight in the neighborhood. An improved and aesthetically pleasing district attracts and increases visitors and tourism, thereby stimulating economic activity.

- *Urban Relief: 100 Tree Planting- February 15, 2014*
We participated with Urban Relief and their "100 Tree Planting". With the help of 70 volunteers, 100 trees made themselves at home in Fruitvale along San Leandro Street! Urban Relief donated the cost of the trees, as well as the cement cutting machines and helped recruit 40 volunteers from various organizations. Here is the link to the YouTube video: <http://www.youtube.com/watch?v=VALRSR0-DrU&feature=youtube> . Danza Azteca opened up the event with a blessing for the trees longevity.
- *35th Avenue Trash Can Redevelopment- Saturdays from May 10th-June 28th*
35th Avenue is a crucial street that connects zones 1 and 2 of the FBID. 7 trash cans were completely revamped with the help of 10 dedicated artists. Each trash can received 3 distinct mosaic designs. Additionally, trash cans were patched where cement was missing; their surfaces cleaned and sanded down, then painted with primer and a separate coat of metal specific paint, then painted with a design of peaches. Volunteers worked every Saturday from 9am-1pm, their hours of dedication are clearly evident and appreciated by residents and business owners alike.

- *Foothill Succulent Garden- October 11, November 7, 2014*
8 volunteers joined us in October to plant over 30 succulents of different varieties. A layer of mulch was added on top of the area to preserve moisture in the dirt. After our 50th Anniversary Gala, we received a donation of 60 succulents, which we added to the garden the next day. Our garden is nearing 100 plants and we hope they are well rooted to sustain themselves in the coming months.
- *Poppy Seed Planting- December 5, 2014*
With the help of 7 youth volunteers, the FBID team planted hundreds of California Poppy Seeds at 4100 Foothill Blvd. We look forward to seeing them bloom in the spring!
- ***Storefront Façade Improvements***

Below is a list of storefronts who have independently completed façade improvements in the FBID area:

- 1921 Fruitvale Ave: Kim's Nail was repainted
- 1925 Fruitvale Ave: Anita's Beauty Salon was repainted
- 1927 Fruitvale Ave: Diva's on a Dime was repainted
- 2021 Fruitvale Ave: East Bay Laundry added a second story, acquired and demolished a house to construct a new parking lot.
- 3301 Foothill Blvd: added new wood floors, painted and gave the place a new face.
- 3300 Foothill Blvd: Coliseum Furniture Outlet received a new sign
- 3347 Foothill Blvd: Cricket Wireless repainted the inside and outside, adding a new sign
- 3027 Foothill Blvd: Metro PCS redecorated inside and out, with new paint and windows.
- 3659 Foothill Blvd: Taqueria Campos painted an authentic mural covering the building.
- 3347 E. 12th St: Taco Grill moved to 3411 E. 12th St and is now called Obelisco Restaurant.
- 3625 International Blvd: Mariscos La Costa received a new big metal sign with light.
- 4108 International Blvd: Century Buffet building received 17 heavy duty awnings.
- 3521 International Blvd: Bank of America made a walkway leading from the sidewalk to the entrance in the back
- 3229 International Blvd: Ace Cash Express repaved most of their parking lot
- 3823 International Blvd: Eli Beauty Salon painted the outside and redecorated the inside.

Promotion of the Fruitvale Commercial Corridors

- *Bus Rapid Transit Survey; March 2014*
Working in collaboration with AnewAmerica, 44 surveys were conducted to gauge the worries merchants along International Blvd have with the coming BRT project.
- *Fruitvale Easter Egg-Stravaganza; April 2014*
With Easter being such a fun holiday for kids, the FBID purchased almost 3,000 eggs for distribution throughout the commercial corridors. Eggs were stuffed with candy for the children and amazing discount coupons for the parents which lasted throughout April. 21 business chose to participate in this event whose outcomes had residents and families happy.

- *Fruitvale Survey; April 2014*
Working in collaboration with AECOM, over 100 surveys were conducted at various points throughout the FBID to gather opinions on how the area can be improved.
- *FBID Electronic Newsletters- April and June 2014*
The FBID team sent out 2 electronic newsletters highlighting the busy spring and summer months, featuring National NeighborWorks Week, the Trash Can Redevelopment Project and other improvements. Newsletters were sent to property owners, merchants and residents.
- *Cinco de Mayo Celebration- May 5, 2014*
Councilmember Noel Gallo organized the Fruitvale district celebration of Cinco de Mayo this year supported by the Unity Council, volunteers and community members. Through donations and volunteers, the celebration included entertainment with music, baile folklorico, Mariachis , a DJ, face painting, and more. The event was widely popular and thousands were in attendance.
- *National Night Out Celebration; August 5, 2015*
Fruitvale normally participates in the National Night Out celebrations and this year was one for the books. From the numerous neighborhood partners to Mayor Jean Quan to the Native American Drum Circle that made it drizzle, folks enjoyed a night of community building.
- *Vision Hispana; August 9, 2014*
A Fruitvale favorite, Nieves Cinco de Mayo was featured in this latino newspaper. Owner Luis Abundis got a 2 page spread to share his story and how he went from a ice cream cart seller to owning 3 businesses; 2 in Oakland and 1 in San Francisco.
- *Dia de los Muertos Community Altar; October 29, 2014*
A team of community volunteers, youth and merchants helped organize the Altar at Fruitvale Plaza Park. Every year, the Community Altar is the biggest altar made and sets the mood for the festival. This year, we honored the Fruitvale activists who are no longer with us, such as Carmen Flores and Don Benito.
- *Fruitvale Christmas Tree Lighting; December 13, 2014*
Although our Tree Lighting was originally scheduled for December 6, the strong storms caused us to change the date. 19 volunteers joined us early in the day to decorate the area for the festivities that night. The Tree Lighting was a success and community members enjoyed taking pictures with the tree and sipping the traditional Christmas Punch.
- *Foothill Christmas Posada; December 18, 2014*
The Christmas Posadas (also known as caroling) is a latino tradition where we re-enact the journey of Mary and Joseph to find a shelter. Community members came decked on in Christmas gear and joined by 2 Santa Clause's walked caroling business to business until reaching the La Tijera parking lot for a feast of Christmas Punch, Hot Chocolate, fresh pastries, tamales and piñatas for the kids. Councilmember Noel Gallo and his family joined.
- *International Christmas Posada; December 19, 2014*
Foothill was a great lead to the International Posadas where even more folks joined in the merriment. We look forward to continuing this great tradition every year.

Business closures/New Businesses

Businesses that closed in 2013-2014 and jobs lost: 13 businesses, 38 jobs

Businesses that opened in 2013-2014 and jobs created: 22 businesses, 44 jobs

3. Improvements and activities to be provided for the upcoming calendar year:

- Supervise street maintenance services and ensure performance delivery throughout FBID
- Promote and support the annual Dia de los Muertos Festival and other events
- Continue the efforts of the Merchants Watch Program and other avenues for safety
- Participate and encourage merchants to attend the Neighbor Crime Prevention Council (NCPC) meetings and other City sponsored workshops
- Focus on promotion of the FBID and partner with ACTransit and the City of Oakland around the coming Bus Rapid Transit Project
- Provide relevant workshops to address the evolving needs of merchants
- Partner with organizations to provide support and online visibility to Fruitvale Merchants
- Maintain an up to date property vacancy tracking database
- Serve as a liaison between Property Owners and Business Owners
- Develop a detailed Business Packet inclusive of city guidelines for future businesses
- Conduct outreach in the form of 2 District Tours/Open Houses for prospective businesses
- Provide Technical Assistance to Business Owners and ongoing support
- Conduct a survey to engage district shoppers and gauge district needs

4. Estimate of the cost of providing improvements and activities for the upcoming calendar year:

**THE UNITY COUNCIL
FRUITVALE BID SUPPORT SERVICES
PROPOSED BUDGET
CALENDAR YEAR 2015**

Budget Line Item	2015	
<u>Personnel</u>		
Program Manager (Maria Sanchez)	\$ 40,000	
Subtotal	40,000	
Taxes/Benefits	10,400	
Total Personnel Costs	50,400	
<u>Contract Services</u>		
Cleaning (PSC)	214,508	Per BID Contract Cost Estimates
Total Contract Services	214,508	
<u>Marketing/Operating Expenses</u>		
Marketing/Promotion/Operating	10,189	
Administration (10% of \$301,983)	26,886	
Total Marketing/operating Expenses	37,075	
TOTAL UC	301,983	
<u>Contingency & Fees</u>		
City & Alameda County (Aprx 7.0%)	(1) 22,730	
	22,730	
GRAND TOTAL	324,713	

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

5. Method of Basis of Levying the Assessment

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

Zone One includes Fruitvale Avenue from Foothill Boulevard to East 12th Street (excluding 1500 to 1900 Fruitvale), Foothill Boulevard from Fruitvale Avenue to 34th Avenue, International Boulevard from Fruitvale Avenue to 42nd Avenue, and East 12th Street from 33rd Avenue to 35th Avenue. The remainder of the district comprises of **Zone Two**.

Due to inflation, the cost of our baseline services has escalated while our budget has remained the same. With developments starting in Fruitvale in 2015 (the Bus Rapid Transit Project and Fruitvale Village Part II), the FBID Steering Committee sees a need to invest more funds into promotion to ensure Fruitvale is still a popular destination. It is with this in mind that we decided to begin the process to increase property assessment charges by 5%, which will go into effect in fiscal year 2015-2016, but will be allocated in the 2016 calendar year.

In FY 2015-2016, Zone One properties will be assessed at \$0.1785 per square foot and Zone Two properties will be assessed at \$0.084 per square foot. Properties owned by charitable tax-exempt organizations will pay \$0.084 per square foot in both zones. Residential properties with four units or fewer are not assessed in either zone.



6. The amount of any surplus or deficit revenues to be carried over from a previous year

The budget for calendar year 2014-15 is \$324,713. The expected assessment to be collected that year is \$324,713. Therefore, it is expected that there will be no surplus, however; the services provided in the FBID have been subsidized by the Unity Council. The Unity Council will seek additional funding to provide services to the business and property owners.

7. Contributions from Sources Other than Assessments

The services provided in the BID have been subsidized by the Unity Council. The Unity Council seeks additional funding to provide services to the business and property owners. We project that we will be able to supplement BID services through funding sources including the following:

- Local Initiatives Support Corporation: \$25,000.00 (renewed for personnel)
- NeighborWorks America: \$1,500.00 for National NeighborWorks Week

The Lakeshore/Lakepark Avenues Business Improvement District
4133 Balfour Avenue, Oakland, CA 94610
510-593-3721

2014 Annual Report

1. Proposed changes to boundaries of the BID.
None.
2. Improvements and activities provided during 2014.
 - Sidewalks and gutters swept daily on Lakepark and Lakeshore to Westly Avenues. Additional hours (3) of sweeping added during the weekend due to very large crowds which clog the area on Saturdays and Sundays.
 - We purchased three solar-powered trash compactors to reduce trash and garbage overflow at high pedestrian traffic intersections. After the removal of standard city collectors and a period of adaptation, these are being utilized and trash accumulating in those areas has been significantly reduced.
 - We advocated for renewal of trash pick-up of the city cans on Sundays, and the city complied, thereby, reducing even further the accumulation of trash around overflowing cans.
 - We maintain one private security officer for seven hours a day four days a week and eight hours a day three days a week. In addition to discouraging illegal panhandling, he assists in the communication of concerns between the merchants, the management and the police department. He patrols throughout the district and monitors activities, and he assists with traffic control during our holiday events.
 - Our gardener has stepped up his watering activities during the drought and continues to replant and trim tree well gardens. We contracted with a landscaper to suggest additional plantings, container gardening, etc, but have decided not to add any gardens until it becomes apparent that we experience relief from the drought.
 - This year we purchased new holiday decorations for both avenues and continue to store and install them with the same company. We were limited in design and size due to the excessive signage on all the poles on our avenues. However, the large bows we purchased have highlighted our festive holiday atmosphere. We continue to hold 3 annual holiday events during the fall, spring and winter.

- The administrator produces a merchant newsletter every two months with information on issues, concerns, and resources of interest to the merchants. She also writes a blog for a local newsletter to keep our neighborhood shoppers abreast of activities or new businesses and other activities when they arise.
 - We have contracted with LocalOn to design and implement a new, more interactive website for the district. Our administrator is working with the company to assist in the design, including photos from events and shop windows/activities. This new website will reference and compliment the facebook page that the administrator has already installed and updates regularly.
 - Our Advisory Board holds an annual meeting and dinner including relevant speakers, the council member, the mayor, police representatives, etc., with regular updates that include merchants who wish to participate.
3. Improvements to the District provided during 2014.
Please see the attached budget which includes the purchase of solar powered trash compactors, holiday decorations and an increase in maintenance in the district.
 4. Estimate of the cost of providing services.
Please see the attached budget. We are asking for a 2%, .02, increase to the assessments which is a combination of frontage plus square footage. Our costs for sidewalk cleaning has increased due to extended hours for the service, and our gardening and banner installation services have increased.
 5. Method and basis of levying the assessment will be collected by Alameda County and turned over to the City Treasury Office which forwards them to the Lakeshore/Lakepark Avenues BID Management Corporation. Our annual assessment rate will increase from \$24.00 per linear foot of frontage to \$24.048, and the present \$0.275 per parcel square foot will increase to \$0.2805, and the assessment on tax exempt parcels, regardless of size, will increase from a flat rate of \$250 to a flat rate of \$255 for collection in the next fiscal year.
Tax exempt parcels, regardless of size, will be assessed a flat rate of \$250.00 annually.
 6. Surplus or deficit revenues to be carried over from previous fiscal year.
It is anticipated that the surplus revenues to be carried over will not exceed \$33,000. No deficit is to be carried over.
 7. Contributions from other sources.
None.

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

LAKESHORE/LAKE PARK BID		
PROPOSED BUDGET FOR 2015		
Description		
	Amount	
<i>Income</i>		
Estimated Bid Collections	\$154,644.00	
Total Income	\$154,644.00	
Carry Forward 2015 (Reserve for Nonpayment) (Interest Bearing)	\$33,000.00	
Total Available Funds	\$187,644.00	
<i>Expenses</i>		
Administration	(\$39,000.00)	
Annual Meeting	(\$1,200.00)	
Beautification	Banners	(\$600.00)
	Gardeners	(\$11,200.00)
City (1%) & County Collections Cost (1.7%)	(\$4,094.00)	
Insurance	(\$800.00)	
Maintenance: Sweepers; Steam Cleaners	(\$30,000.00)	
Office Expenses	(\$1,500.00)	
Professional Expenses	(\$650.00)	
Promotions; Capital Improvements	(\$15,000.00)	
Security	(\$54,000.00)	
Total Expenses	(\$158,044.00)	
Reserve For Nonpayment (Year-End Balance)	(\$29,600.00)	
Total Expenditures	(\$187,644.00)	

Should be \$154,644

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

LAKESHORE/LAKE PARK BID		
PROPOSED BUDGET FOR 2015		
Description	Amount	
Income		
Estimated Bid Collections	\$151,612.00	
Total Income	\$151,612.00	
Carry Forward 2015 (Reserve for Nonpayment) (Interest Bearing)	\$33,000.00	
Total Available Funds	\$184,612.00	
Expenses		
Administration	(\$39,000.00)	
Annual Meeting	(\$1,200.00)	
Beautification	Banners	(\$600.00)
	Gardeners	(\$11,200.00)
City (1%) & County Collections Cost (1.7%)	(\$4,094.00)	
Insurance	(\$800.00)	
Maintenance: Sweepers; Steam Cleaners	(\$30,000.00)	
Office Expenses	(\$1,500.00)	
Professional Expenses	(\$650.00)	
Promotions; Capital Improvements	(\$15,000.00)	
Security	(\$54,000.00)	
Total Expenses	(\$158,044.00)	
Reserve For Nonpayment (Year-End Balance)	(\$26,568.00)	
Total Expenditures	(\$184,612.00)	

ANNUAL REPORT FOR THE
JACK LONDON
[BUSINESS] IMPROVEMENT [MANAGEMENT] DISTRICT (JLID) 2015
OAKLAND, CALIFORNIA

1. Proposed Changes in boundaries of the BID:

There are no proposed changes to the boundaries of the Business Improvement Management District

2. Improvements and activities provided during fiscal year 2014:

Maintenance, Beautification, Safety & Streetscape:

A committee has been established to guide activities in this area. The Maintenance and Beautification Committee, chaired by Sara May, property owner representative, has the following statement of purpose:

This committee guides coordination of JLID's contracted services and actively engages district stakeholders with the goal of creating safe, clean, beautiful streets, sidewalks, and public spaces.

The safety ambassador program is run by Block by Block (BBB). The services provided by BBB include but are not limited to:

- walking and bike patrols
- safety and umbrella escorts
- pedestrian and motorist assistance
- acting as a witness to crimes and reporting incidents to the City
- deterring panhandling and loitering

The maintenance, beautification, and streetscape improvements are also implemented by ambassadors and delivered through a contract with BBB. The services include:

- Sidewalk Sweeping
- Sidewalk Steam Cleaning
- Landscaping and Weed Removal
- Reporting & Removal of illegal Dumping
- Graffiti abatement
- Public Space Improvements
- Gateway and underpass treatments

BBB is operated under the on-site supervision of operations manager Carlos Paz Rivera, working out of the JLID office.

Other projects initiated by JLID in 2014 to continue into 2015:

- JLID has determined the baseline services as outlined by the City of Oakland and has begun to track them in order to be able to ensure delivery.
- JLID has begun to track property negligence and develop strategy for property owner engagement
- Coordination of a mural program (in cooperation with the Marketing Committee and area community arts groups)

- Initiated 880 Underpass Improvements through workshops with City of Oakland, area stakeholders, and the City of Oakland Public Art Advisory Committee.

Marketing and Economic Development:

A committee has been established to guide activities in this area. The Marketing and Economic Development Committee, chaired by Paul Thyssen, district resident, has the following statement of purpose:

Through active community engagement with existing and prospective district stakeholders, the Committee guides efforts to promote and enhance the district as a place to live, work, and visit. These activities include but are not limited to: on-going collaborative and independent marketing, advertising, communications, public relations, events, and sponsorships.

Activities initiated in 2014 include:

- Development of District Brand and Identity
- Promotion and representation of the district at City and other organizations' events
- Publicizing business openings, events, and other happenings of the District
- Establishing a social media and online presence through active accounts with Facebook, Twitter, Townsquared, Nationbuilder (website host) and Instagram. Townsquared and Instagram are also integrated with our website platform.
- Sponsorship of events such as community forums both on-site and at local venues which contribute to community-building and develop strategy and additional programs to help achieve the district's vision
- Hosting popup businesses which activate the public space onsite, add vibrancy to the corner at 4th and Broadway, and introduce the start-up business to the Jack London community.

Administration and Government/Community Relations:

Executive Committee:

The Executive Committee guides organizational policy and administration, seeks strategic partnerships, and serves as the task force for recruiting and nominating new Board members.

Land Use and Transportation:

A committee has been established to guide activities in this area. The Land Use and Transportation Committee chaired by Vivian Kahn, district resident and business owner, has the following statement of purpose:

The Land Use and Transportation committee will advocate for projects and planning efforts that support Jack London's vibrancy, quality of life, accessibility and connectivity through active engagement of stakeholders and constructive, inclusive discussions about development in Jack London.

The Land Use and Transportation Committee focuses mainly on advocacy and does not have an allotment of funding, however, it develops and oversees projects and initiatives such as:

- Hosting the forum series on development and revitalization of the District in collaboration with the Marketing and Economic Development Committee.
- Oversight of the train safe and quiet zone project, starting with the raising of funds and engagement of consultant for the initial feasibility study for project implementation.

Staff:

The management and administration of the district is led by contracted Staff. The District Management Corporation has no employees and contracts out all services. Two individuals, one full time (Executive Director) and one part time (Marketing and Administrative Assistant) have been hired through Oakland Venue Management (OVM) the principle contractor for the district. The staff oversees District projects and programs and is the primary point of contact for board members, district stakeholders, the City of Oakland, and the general community. Staff executes the preparation, coordination and implementation of all JLID program activities; oversees the daily business and operations of the PBID in accordance with the policies set by the District Management Plan and the Board of Directors; implements the Strategic Plan for District Management and provides information and guidance to the board in formulating objectives and decisions of general policy; manages budget and finance; and oversees all service contracts, staff, interns, volunteers to fulfill the JLID's vision of a safe, clean, and thriving district.

JLID also hosts an annual public meeting, noticed to all District stakeholders as required in Section 5.12.1 in the Disbursement Agreement between JLID and the City of Oakland.

3. The improvements and activities planned for the fiscal year 2015:

Maintenance, Beautification, Safety & Streetscape services and improvements

In 2015, JLID will continue to deliver Maintenance, Beautification, Safety & Streetscape services and improvements guided by the Committee and through BBB as the primary service provider and at the service level outlined in the management district plan. In addition, JLID will move the following projects forward:

- JLID will identify and address opportunities for more permanent crime prevention through environmental design, strategies (CPDED) such as lighting, removal of PROW obstructions, improvement of visibility, and enhancement of overall district identity beyond the provision of a safe presence and consistent response to dumping and graffiti
- Continue coordination of Mural program with the Marketing committee,
- Implementation of district identity enhancements such as banners, median improvements, and utility box art.
- Coordinate the identification and mapping of security cameras in the district, both on private buildings and in the public right-of-way.
- JLID will consider investment in improved data gathering technologies to allow geo-reference of maintenance and safety issues for prompt resolution.

Marketing & Economic Development

In 2015, JLID will continue to deliver the same Marketing and Economic Development services and improvements, guided by the Committee. In addition, JLID will move the following projects forward:

- Development of District identity and brand
- Redesign and improve online presence
- Development of public relations strategy
- Forum for economic and land-use development - related topics (in collaboration with Land Use and Transportation committee)

- Host annual community event
- Development of retail strategy for improving amenities
- Improve communications and connections between district businesses and the City of Oakland through in-person and online platforms, focused meetings, and outreach.
- Facilitate public art; for example initiate collaboration with Schnitzer Steel, sponsor utility box art wraps, and create mural district (in collaboration with the Maintenance and Beautification Committee)
- Streetscape improvements such as banners and holiday lighting on Broadway to promote District identity as visitor destination
- Creation and promotion of special retail events
- Continual review of opportunities for business attraction and retention in the district and overall economic conditions in the district

Administration & Governmental/Community Relations

In 2015, JLID will continue to provide administration services and advocacy for the stakeholders of the district, guided by the Executive Committee, approved by the Board, and implemented by Staff. JLID will continue to develop strategic partnerships inside and outside district boundaries to create a more welcoming and pleasant environment for businesses, residents, visitors, investors, and employees.

4. Estimated cost for providing the improvement and activities in 2015:

Category	%	Amount
Maintenance, Beautification, Safety & Streetscape Improvements	54	\$419,846
Marketing & Economic Development	16	\$127,370
Administration & Government/Community Relations	17	\$133,737
Contingency & Collection Fees	8	\$62,463
Repayment of formation loans	5	\$37,375
TOTAL	100%	\$780,793

5. Method and basis for levying the assessment:

Three benefit zones are used to apportion special benefit services based upon need. Further details regarding the methodology used can be found in the District Management Plan, page 10. The District Management Plan can be found on file with the Office of the City Clerk, or at <http://www.jlid.org/documents>.

6. Surplus or Deficit for 2015

It is estimated that the JLID will have no carry-forward beyond the prudent contingency reserve amount of \$45,726.