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# AGENDA REPORT

**TO:** Sabrina B. Landreth  
City Administrator

**FROM:** Mark Sawicki  
Director, EWD

**SUBJECT:** Lake Merritt-Uptown Community  
Benefit District 2018

**DATE:** April 25, 2018

City Administrator Approval

Date:

4/26/18

## RECOMMENDATION

Staff Recommends That The Oakland City Council Adopt A Resolution Of Intention (1) To Form The Lake Merritt-Uptown Community Benefit District 2018 ("LCBD 2018"); (2) Granting Preliminary Approval Of The LCBD 2018 Management Plan ; (3) Directing Filing Of The Proposed LCBD 2018 Assessment District Boundary Description; (4) Directing Distribution of A Ballot To All Affected Property Owners Whereby They Can Vote "In Favor Of" or "Against" the Proposed LCBD 2018 And Assessment To Determine Whether A Majority Protest Exists; And (5) Scheduling A Public Hearing For July 17, 2018.

Staff Recommends That The Oakland City Council Adopt A Resolution Authorizing The City Administrator (1) To Sign The Ballot In Favor Of The Formation Of The Lake Merritt-Uptown Community Benefit District 2018 ("LCBD 2018"); And (2) To Pay A Cumulative Fiscal Year 2018-2019 Fair Share Assessment In An Approximate Amount of \$67,795.41 For Seven (7) City-Owned Properties On Which Assessments Are To Be Levied (1731 Franklin APN 008 062300601; 274 19<sup>th</sup> St APN 008 063500100; 2025 Broadway APN 008 064900500; Grand Ave APN 008 065500600; 200 Grand Ave APN 010 076800400; 2500 Broadway APN 008 067300100; 1911 Telegraph APN 008 071605800), If The LCBD 2018 Is Established.

Staff Recommends That The Oakland Redevelopment Successor Agency (ORSA) Governing Body (1) Adopt a Resolution Authorizing The Agency Administrator To Sign The Ballot In Favor Of The Formation Of The Lake Merritt-Uptown Community Benefit District 2018 ("LCBD 2018"); And (2) To Pay A Cumulative Fiscal Year 2018-2019 Fair Share Assessment In An Approximate Amount Of \$1,217.84 For One (1) Oakland Redevelopment Successor Agency-Owned Property (490 Thomas L. Berkley Way APN 008 064900900) If The LCBD 2018 Is Established.

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## **EXECUTIVE SUMMARY**

Adoption of the attached Resolution of Intention will initiate a special election to determine whether the proposed Lake Merritt-Uptown Community Benefit District 2018 (hereinafter "LCBD 2018") can be formed. To adopt the attached Resolution of Intention the City Council would need to first receive a petition in favor of forming the LCBD 2018, endorsed by more than 30 percent of the weighted value of the property assessments that would be imposed if the LCBD 2018 is established. If the petition is duly endorsed, the City Council may adopt the attached proposed Resolution of Intention and conduct a public hearing not less than 45 days after notice of the Public Hearing is published. Upon passage of the Resolution of Intention, ballots will be mailed to each affected property owner pursuant to the City of Oakland's Business Improvement Management District Ordinance OMC Chapter 4.48 (Ord. No. 12190 C.M.S., 1999, as amended by Ord No.13322 C.M.S., 2015) and State Proposition 218.

The City Council shall approve formation of the LCBD 2018 and the assessment if, at the close of the Public Hearing, a majority protest is not established. A majority protest exists if, upon the conclusion of the Public Hearing, ballots submitted in opposition to the establishment of the LCBD 2018 and corresponding property assessment exceed the ballots submitted in favor of the LCBD 2018 and corresponding property assessment. In tabulating the ballots, the ballots shall be weighted according to the proportional financial obligation upon the affected property. The results of the balloting will be heard at the public hearing to be scheduled for July 17, 2018, at which time the City Council will also hear public testimony and make a final decision regarding LCBD 2018 formation.

If established, the Lake Merritt-Uptown Community Benefit District 2018 will generate special assessment revenues of approximately \$1,509,320 per year for a period of 10 years, or up to approximately \$18.98 million over the life of the district (if allowable five percent annual increases to the assessments are taken). Effective dates of the assessment will be July 1, 2018, through June 30, 2028, and related special benefit services will be provided January 1, 2019, through December 31, 2028.

Services to be provided are outlined in a district Management Plan drafted by district representatives (**Exhibit A** to the attached Resolution of Intention) and include, but are not limited to, special benefit cleaning, marketing, hospitality ambassadors, public right of way beautification and other economic development services within the district.

## **BACKGROUND / LEGISLATIVE HISTORY**

In 1999, the City Council approved the City of Oakland Business Improvement Management District Ordinance (Ordinance No. 12190 C.M.S. codified as Chapter 4.48 of the Oakland Municipal Code) which allows for the formation of property-based special assessment districts to undertake a range of special benefit services within the assessment area, independent from government, to support the economic viability of affected commercial neighborhoods.

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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 such districts.

Pursuant to the above, on July 15, 2008, the Oakland City Council adopted Resolution No. 81478 C.M.S. to form the Lake Merritt-Uptown Community Benefit District 2008 (LCBD 2008) for a period of 10 years beginning July 2008 and ending June 2018.

In 2017, Lake Merritt-Uptown district stakeholders hired a private BID consultant firm (Progress Urban Management Associates) to assist with the formation of a proposed LCBD 2018 to replace the expiring LCBD 2008.

Pursuant to those efforts, on or before May 15, 2018, district stakeholders will file evidence of support sufficient to qualify for the attached Resolution of Intention to form the LCBD 2018. Evidence of sufficient support is comprised of a petition in favor of the creation of the LCBD 2018 and corresponding property assessment, signed by affected property owners representing more than 30 percent of total projected district assessments.

The proposed boundaries of the LCBD 2018 include the area of the existing LCBD 2008 around the Broadway corridor roughly bounded by 17<sup>th</sup> Street to the south, Telegraph Avenue to the west, 25<sup>th</sup> Street to the north and Lakeside Drive and Alice Street to the east as well as proposed expansion areas which include a northern extension of the district to 27<sup>th</sup> Street and a western extension to both sides of Telegraph Avenue south of 20<sup>th</sup> Street. A detailed description of proposed LCBD 2018 boundaries is as follows:

**Northern Boundary:** Starting at the corner of Grand Avenue and Bay Place, parcel number 10-768-4, running west on the north side of Bay Place to the corner of Vernon Street and Bay Place, parcel number 10-795-27-1, and continuing westward to the corner of 27<sup>th</sup> Street and Harrison Street, parcel number 8-671-20-1, then continuing west along the southern side of 27<sup>th</sup> Street to northeast corner of Broadway, parcel number 9-684-3-2, then moving south along Broadway to the southeast corner of 24<sup>th</sup> and Broadway, parcel number 8-674-3-1 and continuing further west along 24<sup>th</sup> Street until the northern LCBD 2018 boundary meets the eastern boundary of the Koreatown Northgate CBD, parcel number , one parcel to the east the intersection of Telegraph Avenue and 24<sup>th</sup> Street, parcel number 8-674-18.

**Southern Boundary:** Starting at the southeast corner of 17<sup>th</sup> Street and Alice Street, parcel number 8-626-8, running west along 17<sup>th</sup> Street to where the boundary meets the northern boundary of the Downtown Oakland CBD at the northeast corner of 17<sup>th</sup> Street and Franklin Street, parcel number 8-624-17, one parcel north of the corner of 17<sup>th</sup> Street and Franklin Street, parcel number 8-623-6-1, just one parcel north of the southwest corner of 17<sup>th</sup> Street and Broadway, parcel number 8-623-11, to one block north of the southeast corner of 17<sup>th</sup> Street and Telegraph Avenue, parcel number 8-640-10, to one block north of the southwest corner of 17<sup>th</sup> Street and Telegraph Avenue, parcel number 8-641-4.

**Eastern Boundary:** Starting at the southwest corner of 17<sup>th</sup> Street and Alice Street, parcel number 8-626-8, running north along the west side of Alice Street, including the eastern boundary of Snow Park, and continuing north onto Lakeside Drive to the southeast corner of 20<sup>th</sup> Street and Harrison Street, parcel number 8-635-1, and continuing along the west side of Harrison Street where LMUDA's eastern boundary meets with LMUDA's northern boundary at the southeast corner of Bay Place and Grand Avenue, parcel number 10-768-4.

**Western Boundary:** Starting approximately halfway down 18<sup>th</sup> Street between San Pablo Avenue and Telegraph Avenue next to The Fox Theater, parcel number 8-642-16, running north along the west side of Telegraph Avenue to approximately halfway down 19<sup>th</sup> Street between Telegraph Avenue and San Pablo Avenue, encompassing 1911 Telegraph, parcel number 8-716-58, continuing up Williams Street to the southwest corner of Rashida Muhammad Street and Williams Street, Parcel number 8-716-56, continuing on the east side of Rashida Muhammad Street to 20<sup>th</sup> Street (aka Thomas L. Berkeley Street) to the southwest corner of 20<sup>th</sup> Street and Telegraph Avenue, continuing north along the north side of 20<sup>th</sup> Street, parcel number 8-649-9, then continuing to the backside of the Paramount Theatre on 21<sup>st</sup> Street, parcel number 8-648-18, continuing down 22<sup>nd</sup> Street to one parcel east of Telegraph Avenue, parcel number 8-658-10, continuing north along the eastern boarder of the Koreatown Northgate CBD to 24<sup>th</sup> Street, parcel number 8-674-18.

A map of the proposed LCBD 2018 boundaries appears in Section IV of the attached LCBD 2018 Plan (*Exhibit A* to the attached Resolution of Intention).

The existing LCBD 2008 includes approximately 287 parcels which generate approximately \$1,208,712 per year. The proposed LCBD 2018 would include 457 parcels with projected first year revenues of \$1,494,805. Activities completed by the LCBD 2008 are detailed in annual reports to the City Council pursuant to enabling legislation and, include but are not limited to, special benefit cleaning, hospitality ambassadors, enhanced public safety efforts and various marketing and promotional activities. The proposed LCBD 2018 will continue providing services similar to the existing LCBD 2008 except that special benefit services will be provided to a larger geographic area as described above.

## **ANALYSIS AND POLICY ALTERNATIVES**

If approved by affected property owners under the procedure set forth primarily in Oakland Municipal Code section 4.48.070, the proposed LCBD 2018 will generate approximately \$1,509,320 in year one of the district and up to approximately \$18.98 million over the 10-year term of the district. Of this total, the City will owe approximately \$67,795.41 in Fiscal Year (FY) 2018-19 and an estimated maximum \$852,723.38 over the 10-year life of the district for assessments on seven City-owned properties (1731 Franklin APN 008 062300601; 274 19<sup>th</sup> St APN 008 063500100; 2025 Broadway APN 008 064900500; Grand Ave APN 008 065500600; 200 Grand Ave APN 010 076800400; 2500 Broadway APN 008 067300100; 1911 Telegraph APN 008 071605800) located within the LCBD 2018 boundaries. The City is currently paying \$47,625.02 for related assessments on five City-owned properties located in the LCBD 2008; therefore, the City's fair share assessment would increase by an approximate \$20,170.39 in the proposed LCBD 2018.

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Additionally, there will be a BID assessment of approximately \$1,217.84 per year (a maximum \$15,317.86 over the proposed 10-year term of the LCBD 2018) on one ORSA-owned property located within the proposed LCBD 2018.

If the City or ORSA acquire additional affected properties during the BID's proposed 10-year term, then funding sources for related assessments owed will be identified as part of the City's and ORSA's ongoing budget development processes.

Given current tightening of municipal funding sources and a growing need to identify alternate economic development revenue sources, the proposed special assessment district and corresponding City assessment could be considered a reasonable leveraging of public funds. Special benefit services to be provided by the proposed district are intended to improve the conditions and image of the affected commercial corridor(s) and to stimulate ongoing economic revitalization within the surrounding commercial neighborhood consistent with City Council goals and objectives.

Formation of the proposed LCBD 2018 would represent the twentieth BID to be formed in Oakland (which includes district renewals completed in 2006, 2011, 2012, 2014, 2015, 2017 and 2018). Collectively, these districts (past and present) have contributed significantly to Oakland's economic development progress and continue to contribute at a rate of approximately \$6.6 million per year. As more mixed use development occurs in Oakland commercial zones, residential property owners have also begun to benefit from special benefit services provided by BID special assessment districts. As such the cumulative impact of BIDs continues to grow, making them an increasingly useful tool for supporting broader revitalization efforts in Oakland's commercial neighborhoods.

Because BIDs are self-initiated, self-funded, and self-administered entities, there is limited fiscal impact to the City associated with the proposed district formation beyond the above-referenced assessment on City and ORSA owned property and the cost of City staff to provide technical assistance to the formation effort and ongoing administration of the citywide BID program. The cost of City staff time is accounted for in the City's FY 2017-19 budget.

The initiative taken by district stakeholders to form the proposed special assessment district also represents a productive step towards community self-empowerment as well as a viable opportunity to cultivate additional public-private investment partnerships, all of which may merit the City's support.

### **FISCAL IMPACT**

If the proposed LCBD 2018 is formed, a cumulative and approximate annual fair share assessment of \$67,795.41 would be levied on seven City-owned properties and \$1,217.84 on one Successor Agency-owned property within the proposed district as follows:

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**Table 1: List of City and ORSA properties subject to FY 2018-19 LCBD 2018 Assessment**

Fund Source No.*	APN	Site Description	FY 2018-19 Assessment	Owner
1	008 062300601	1731 Franklin (Franklin St Garage)	\$ 18,073.93	City
1	008 063500100	274 19 <sup>th</sup> St (Snow Park)	\$ 20,392.75	City
1	008 064900500	2025 Broadway (Paramount Theater)	\$ 8,188.08	City
1	008 065500600	Grand Ave (foot of Valdez)	\$ 1,808.89	City
1	010 076800400	200 Grand Ave (Veterans Memorial Bldg)	\$ 10,122.04	City
1	008 067300100	2500 Broadway (Plaza)	\$ 1,211.56	City
2	008 071605800	1911 Telegraph (Vacant)	\$ 7,998.16	City
		<b>City Total</b>	<b>\$ 67,795.41</b>	
2	008 064900900	490 Thomas L. Berkeley Way	\$ 1,217.84	ORSA
		<b>ORSA Total</b>	<b>\$ 1,217.84</b>	
		<b>City and ORSA Grand Total</b>	<b>\$ 69,013.25</b>	

\*See below table for corresponding Fund Source Numbers

**Table 2: List of Funding Sources for Payment of FY 2018-19 LCBD 2018 Assessments on City Properties**

Fund Source No.	Coding Block	Amount
1	General Purpose Fund (1010)/Citywide Activities Organization (90591)/Taxes and Assessments (53511)/Business Improvement District Project (1000147)/IP50	\$ 59,797.25
2	Central District Projects Fund (5610)/Central District Redevelopment Organization (85245)/Taxes and Assessments (53511)/Downtown Capital Project (1000169)/SC13	\$ 9,216.00

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Per the proposed LCBD 2018 Management Plan assessment rates may increase by up to five percent per year beginning in year two of the district's 10-year term and contingent upon a recommendation by the LCBD 2018 Advisory Board and City Council approval.

If the City or ORSA acquire additional affected properties during the BID's proposed 10-year term, then funding sources for related assessments owed will be identified as part of the City's and ORSA's ongoing budget development processes.

The cost of City staff time to provide technical assistance to the BID formation effort and to ongoing administration of the citywide BID Program is accounted for in the City's FY 2017-19 Budget and will also be included in future budget development processes.

If the LCBD 2018 and corresponding special property assessment are approved, the City Treasury Division will provide invoices to tax exempt entities that are not on the County of Alameda'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 (less the County's collection fee of approximately 1.7 percent of total assessment) to the City. The City, in turn, will disburse the funds to the district, pursuant to a written agreement between the City and the district's designated non-profit management corporation.

The written agreement to be signed between the City and the designated non-profit BID management corporation also provides for a one percent administrative fee to be charged to the LCBD 2018 to partially recover the City's costs of administering the district, including costs incurred by the Treasury Division for providing the services described above.

Lastly, if the LCBD 2018 is formed, program guidelines state that the City is expected to maintain a base level of service within the district equivalent to the level prior to formation of the assessment district. Maintaining baseline services, however, commits no additional City funds beyond what already exists. Proportional reductions to baseline services may occur resulting from changes in the City's overall financial condition.

### **PUBLIC OUTREACH / INTEREST**

For the City Council to adopt the attached Resolution of Intention, 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 the requisite number of property owner petitions to qualify for adoption of the attached Resolution of Intention.

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## **COORDINATION**

The City Controller and Revenue Management Bureaus of the Finance Management Agency, the Office of the City Attorney and the Public Works Agency were consulted in the preparation of this report and its attachments.

## **SUSTAINABLE OPPORTUNITIES**

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

**Environmental:** The proposed levy will enable the district to continue its efforts to strengthen and beautify the physical image of the affected commercial neighborhood by providing special benefit services such as enhanced sidewalk cleaning, graffiti removal, and trash removal along the affected commercial corridor.

**Social Equity:** The proposed special assessment district will incorporate members of the affected commercial neighborhood into a productive and proactive entity representing the interests of that community. Stakeholders themselves will be responsible for administering district revenues which contributes to community self-empowerment which may, in turn, contribute to various social equity goals.

## **ACTION REQUEST OF THE CITY COUNCIL**

Staff Recommends That The Oakland City Council Adopt A Resolution Of Intention (1) To Form The Lake Merritt-Uptown Community Benefit District 2018 ("LCBD 2018"); (2) Granting Preliminary Approval Of The LCBD 2018 Management Plan ; (3) Directing Filing Of The Proposed LCBD 2018 Assessment District Boundary Description; (4) Directing Distribution of A Ballot To All Affected Property Owners Whereby They Can Vote "In Favor Of" or "Against" the Proposed LCBD 2018 And Assessment To Determine Whether A Majority Protest Exists; And (5) Scheduling A Public Hearing For July 17, 2018.

Staff Recommends That The Oakland City Council Adopt A Resolution Authorizing The City Administrator (1) To Sign The Ballot In Favor Of The Formation Of The Lake Merritt-Uptown Community Benefit District 2018 ("LCBD 2018"); And (2) To Pay A Cumulative Fiscal Year 2018-2019 Fair Share Assessment In An Approximate Amount of \$67,795.41 For Seven (7) City-Owned Properties On Which Assessments Are To Be Levied (1731 Franklin APN 008 062300601; 274 19<sup>th</sup> St APN 008 063500100; 2025 Broadway APN 008 064900500; Grand Ave APN 008 065500600; 200 Grand Ave APN 010 076800400; 2500 Broadway APN 008 067300100; 1911 Telegraph APN 008 071605800), If The LCBD 2018 Is Established.

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Staff Recommends That The Oakland Redevelopment Successor Agency (ORSA) Governing Body (1) Adopt a Resolution Authorizing The Agency Administrator To Sign The Ballot In Favor Of The Formation Of The Lake Merritt-Uptown Community Benefit District 2018 ("LCBD 2018"); And (2) To Pay A Cumulative Fiscal Year 2018-2019 Fair Share Assessment In An Approximate Amount Of \$1,217.84 For One (1) Oakland Redevelopment Successor Agency-Owned Property (490 Thomas L. Berkley Way APN 008 064900900) If The LCBD 2018 Is Established.

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

Prepared by:  
Maria Rocha, BID Program Manager

**DRAFT**

Oakland City Attorney's Office

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OAKLAND CITY COUNCIL

RESOLUTION \_\_\_\_\_ C.M.S.

**RESOLUTION (1) OF INTENTION TO FORM THE LAKE MERRITT-UPTOWN COMMUNITY BENEFIT DISTRICT 2018 ("LAKE MERRITT-UPTOWN CBD 2018"); (2) GRANTING PRELIMINARY APPROVAL OF THE LAKE MERRITT-UPTOWN CBD 2018 MANAGEMENT PLAN; (3) DIRECTING FILING OF THE PROPOSED LAKE MERRITT-UPTOWN CBD 2018 ASSESSMENT DISTRICT BOUNDARY DESCRIPTION; (4) DIRECTING DISTRIBUTION OF A BALLOT TO ALL AFFECTED PROPERTY OWNERS WHEREBY THEY CAN VOTE "IN FAVOR OF" OR "AGAINST" THE PROPOSED LAKE MERRITT-UPTOWN CBD 2018 AND ASSESSMENT TO DETERMINE WHETHER A MAJORITY PROTEST EXISTS; AND (5) SCHEDULING A PUBLIC HEARING FOR JULY 17, 2018**

**WHEREAS**, the City Council of the City of Oakland enacted the City of Oakland Business Improvement Management District Ordinance (Chapter 4.48, Ordinance 12190 of 1999, hereinafter "BIMD Ordinance") establishing the procedures for the formation of business improvement management districts; and

**WHEREAS**, the City Council approved a Neighborhood Business Improvement District ("NBID") Program pursuant to Oakland City Council Resolution No. 75323, dated November 9, 1999, to provide technical and financial assistance to stakeholder groups of business and property owners in the City to assist in the formation of such districts; and

**WHEREAS**, the property owners in the Lake Merritt-Uptown district (generally: the Broadway corridor roughly bounded by 17<sup>th</sup> Street to the south, Telegraph Avenue to the west, 25<sup>th</sup> Street to the north and Lakeside Drive and Alice Street to the east) previously petitioned for the creation of the Lake Merritt-Uptown Community Benefit District 2008 (hereinafter "Lake Merritt-Uptown CBD 2008"), and said Lake Merritt-Uptown CBD 2008 and corresponding assessments were approved by the Oakland City Council through Resolution No. 81478 C.M.S., dated July 15, 2008; and

**WHEREAS**, the Lake Merritt-Uptown CBD 2008 will reach the end of its maximum 10 year existence by the end of 2018, as authorized by Oakland Municipal Code Chapter 4.48; and

**WHEREAS**, the property owners in the Lake Merritt-Uptown district have duly petitioned to form the Lake Merritt-Uptown Community Benefit District 2018

("Lake Merritt-Uptown CBD 2018") under the BIMD Ordinance (OMC section 4.48.050.A.), and have proposed the Lake Merritt-Uptown CBD 2018 Management Plan ("Lake Merritt-Uptown CBD 2018 Plan") attached hereto and incorporated by reference as **Exhibit A**, for the operation of the Lake Merritt-Uptown CBD 2018; and

**WHEREAS**, the Lake Merritt-Uptown CBD 2018 Plan contains a detailed engineer's report prepared by a registered professional engineer recognized by the State of California (see *Exhibit i* of **Exhibit A** to this Resolution of Intention) ("Engineer's Report"); and

**WHEREAS**, the Lake Merritt-Uptown CBD 2018 Plan was prepared in accordance with the provisions of Article XIII of the California Constitution, and has been filed with the City Clerk for proceedings in formation of this district; and

**WHEREAS**, the Lake Merritt-Uptown CBD 2018 Plan, incorporated by this reference, when compared to the Lake Merritt-Uptown CBD 2008 Plan), provides for enhanced cleaning, marketing, and promotional activities and improvements of particular benefit to the properties located within the proposed Lake Merritt-Uptown CBD 2018 (as more specifically identified therein); and

**WHEREAS**, the Lake Merritt-Uptown CBD 2018 Plan was prepared in accord with the provisions of the BIMD Ordinance overseeing the formation of the Lake Merritt-Uptown CBD 2018 as referenced above, and has been filed with the City Clerk for proceedings in formation of this Lake Merritt-Uptown CBD 2018; now, therefore be it

**RESOLVED**, that the City Council of the City of Oakland finds that the Lake Merritt-Uptown CBD 2018 Plan satisfies all the requirements of the BIMD Ordinance, the laws of the State of California and the California Constitution with regard to the formation of business improvement management districts, and does hereby resolve, find, determine and give notice as follows:

1. The Preliminary Report of the City Clerk was filed on April 26, 2018 which describes the matters required by the BIMD Ordinance.
2. A business improvement management district is proposed to be established pursuant to the BIMD Ordinance with the boundaries as specified in the Lake Merritt-Uptown CBD 2018 Plan.
3. A copy of the preliminary report of the City Clerk is on file in the office of the City Clerk relating to the formation of the Lake Merritt-Uptown CBD 2018.
4. The Lake Merritt-Uptown CBD 2018 Plan is preliminarily approved and the assessments for the first year shall be as provided for in the Lake Merritt-Uptown CBD 2018 Plan if the Lake Merritt-Uptown CBD 2018 is established.

5. The District shall be a business improvement management district, and the name of the District shall be the "Lake Merritt-Uptown Community Benefit District 2018".
6. The reasons for the assessments and the types of the improvements and activities proposed to be funded and acquired by the levy of assessments on property in the Lake Merritt-Uptown CBD 2018 and the time period for which the proposed improvements are to be made are those specified in Sections IV and V of the Lake Merritt-Uptown CBD 2018 Plan.
7. Except where funds are otherwise available, an assessment will be levied annually to pay for all improvements and activities within the Lake Merritt-Uptown CBD 2018.
8. Except for fair share annual assessments totaling approximately \$67,795.41 on seven (7) City owned properties located within the district, no fiscal impact is anticipated to the City. The above assessments on City owned properties are further discussed in a separate and related resolution, The Lake Merritt-Uptown CBD 2018 if approved will be a self-funded and self-administered entity. Until disbursed, Lake Merritt-Uptown CBD 2018 assessments will be held in a special trust fund established on behalf of the district in Miscellaneous Trusts Fund (7999)/Treasury Operations Org (08721)/Pass Thru Assessments Account (24224)/DP 080 Administrative Project (1000007)/Lake Merritt-Uptown CBD (LCBD).
9. The boundaries of the Lake Merritt-Uptown CBD 2018 are described and delineated in Section IV.A. of the Lake Merritt-Uptown CBD 2018 Plan, including a map outlining each affected lot.
10. The proposed Lake Merritt-Uptown CBD 2018 contains one Benefit Zone, which is delineated in the benefit zone map of Section IV.A. of the Lake Merritt-Uptown CBD 2018 Plan.
11. The proposed method and basis of levying the assessments to be levied against each property in the Lake Merritt-Uptown CBD 2018 is based on the lot square footage, building square footage, linear frontage and land use of each parcel located within the Lake Merritt-Uptown CBD 2018, and the assessments proposed for each property are contained in the Engineer's Report to the Lake Merritt-Uptown CBD 2018 Plan.

12. The assessments for the entire Lake Merritt-Uptown CBD 2018 equal \$1,509,320 for the first year of the Lake Merritt-Uptown CBD 2018 and the amount chargeable to each parcel are as shown in the Engineer's Report to the Lake Merritt-Uptown CBD 2018 Plan.
13. The Lake Merritt-Uptown CBD 2018 assessment shall be effective for a period of ten (10) years (beginning July 1, 2018 through June 30, 2028 as provided for in the Lake Merritt-Uptown CBD 2018 Plan) during which a maximum 5% increase per year in the amount of the assessment on each property shall be allowable as provided for in the Lake Merritt-Uptown CBD 2018 Plan. Related special benefit services will begin January 1, 2019 and end December 31, 2028.
14. The assessment shall be attached to the property and collected with the annual county property taxes, and in certain cases through a special municipal billing, and shall continue annually as provided for in the Lake Merritt-Uptown CBD 2018 Plan for each year that the Lake Merritt-Uptown CBD 2018 is in existence unless modified by the City Council on the recommendation of the Lake Merritt-Uptown CBD 2018 Advisory Board.
15. The City Clerk is directed to mail a copy of the Resolution of Intention to form the Lake Merritt-Uptown CBD 2018 along with the ballots (see **Exhibit B** hereto) for the written protest procedure to all affected property owners in the Lake Merritt-Uptown CBD 2018 in compliance with the BIMD Ordinance and Article XIII of the California Constitution and to each local Chamber of Commerce and business organization known to be located within the Lake Merritt-Uptown CBD 2018, give all other notices and take all other actions required by law, and give notice of the dates of the Public Hearing and Final Action on the Petition for Formation of the Lake Merritt-Uptown CBD 2018 to all affected property owners in the proposed Lake Merritt-Uptown CBD 2018 not less than forty-five (45) days before the scheduled public hearing, and also publish the Resolution of Intention in a newspaper of general circulation in the City of Oakland once, at least seven (7) days before the public hearing. The ballots mailed to the affected property owners shall contain the procedures for the completion and return of the ballots.

16. **A Public Hearing is set for July 17, 2018, (at 6:30 P.M. in the City Council Chambers in City Hall,** located at 1 Frank H. Ogawa Plaza, Oakland California), and as may be continued by the City Council, to hear public testimony and protests, to complete the counting of the returned ballots as to the formation of the District, and to take final action as to the formation of the District.
17. At the Public Hearing, the testimony of interested persons for or against the establishment of the Lake Merritt-Uptown CBD 2018, the proposed assessment, the boundaries of the Lake Merritt-Uptown CBD 2018, or the furnishing of the specified types of improvements or activities will be heard.
18. **BALLOT PROCEDURES:**
- a. Filing of **BALLOTS** – Persons/entities who receive ballots shall mail them in or file them personally with the City Clerk’s Office before the close of the July 17, 2018 Public Hearing. Ballots include an option to either vote YES in Favor of establishment or NO against establishment of the Lake Merritt-Uptown CBD 2018. The procedures applicable to the completion and return of the ballots are as specified in the ballot, a copy of which is attached hereto as ***Exhibit B*** and incorporated herein by this reference.
  - b. **MAJORITY PROTEST - If there is a majority protest, the assessment will not be imposed.** A majority protests exists if, upon the conclusion of the Public Hearing, ballots submitted in opposition to the Lake Merritt-Uptown CBD 2018 and corresponding assessment exceed the ballots submitted in favor of the Lake Merritt-Uptown CBD 2018 and corresponding assessment.
    - i. A protest may be made in writing by any interested person through the ballot procedure. Any protest pertaining to the regularity or sufficiency of the proceedings shall be in writing and shall clearly set forth the irregularity or defect to which the objection is made.
    - ii. Every written protest shall be filed with the City Clerk at or before the time fixed for the Public Hearing. A written protest may be withdrawn in writing at any time before the conclusion of the Public Hearing.
    - iii. Each written protest shall contain a description of the property in which the person subscribing the protest is interested sufficient to identify the property and, if a person subscribing is not shown on the official records of the City as the owner of the property, the protest shall contain or be accompanied by written evidence that the person subscribing is the owner of the property.
    - iv. A written protest which does not comply with the requirements stated above shall not be counted in determining a majority protest.

- c. **TABULATION OF BALLOTS** - After the close of the Public Hearing, tabulation of the ballots will be completed under the direction of the City Clerk and the results of the tabulation will be reported to the City Council. In tabulating the ballots, the ballots shall be weighted according to the proportional financial obligation upon the affected property.

IN COUNCIL, OAKLAND, CALIFORNIA, \_\_\_\_\_, 2018.

**PASSED BY THE FOLLOWING VOTE:**

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

**NOES-**

**ABSENT-**

**ABSTENTION-**

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

# ***Exhibit A***



**MANAGEMENT DISTRICT PLAN**  
for the  
**LAKE MERRITT-UPTOWN**  
**COMMUNITY BENEFIT DISTRICT<sup>2018</sup> (CBD)**

**DRAFT PLAN**

April 23, 2018

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**Exhibits**

- i. Engineer's Report with list of properties to be benefited

*Exhibits are available upon request to the Lake Merritt-Uptown District Association.*

**Prepared for the Lake Merritt-Uptown District Association by  
Progressive Urban Management Associates, Inc.  
and Kristin Lowell, Inc.**

# **MANAGEMENT DISTRICT PLAN for the renewal of the LAKE MERRITT-UPTOWN COMMUNITY BENEFIT DISTRICT 2018 (CBD) DRAFT – April 23, 2018**

## **INTRODUCTION**

Formed in 2008 by property owners, the Lake Merritt-Uptown 2008 CBD is a special district that collects a self-governed assessment on property to provide safe and clean enhancements through hospitality, maintenance and beautification services, and marketing and economic enhancements to improve the downtown Oakland's livability and business climate.

The CBD 2008 was formed with a ten-year term and is set to expire, unless renewed by affected property owners and the City of Oakland, in July 2018 with related services ending in December 2018. To prepare for the renewal of the CBD, the Lake Merritt-Uptown Association (LMUDA) retained the services of Progressive Urban Management Associates, Inc. to update the organization's strategic plan. With priorities gained from the LMUDA Board of Directors and through an extensive strategic planning process that included an evaluation of market conditions, stakeholder focus groups and responses to an online community improvement survey, the proposed new CBD Management Plan will offer support for the following services:

- Increased deployment of "Ambassador" teams to provide enhanced hospitality, cleaning and landscaping throughout the district;
- Increased energy and resources to reduce disruptive street behaviors and work with civic and social service partners to address homelessness;
- New resources to provide an expanded communications function and a special projects fund to help respond to new district challenges and opportunities on a year-to-year basis.
- Continued economic enhancements supporting local businesses and attracting new investment, thereby retaining and extending tenancies in buildings.

## **MANAGEMENT PLAN SUMMARY**

Pursuant to the City of Oakland Business Improvement District Management Ordinance 12190, Chapter 4.48 of the Oakland Municipal Code, as amended July 21, 2015, the existing Lake Merritt-Uptown CBD is being renewed for a ten-year term. Upon receipt of petitions signed by property owners representing greater than 30% of assessments proposed to be levied for the District, the City of Oakland will initiate a ballot procedure to officially form and renew the CBD.

Governed by the Lake Merritt-Uptown Association Board of Directors, the District's work program will deliver activities and improvements to improve and convey special benefits to properties located within the Lake Merritt-Uptown CBD area. The District will continue to provide both clean and safe and marketing and economic enhancements. Each of the activities is designed to meet District goals:

1. Producing a consistently clean, welcoming, and attractive downtown experience,
2. Improving safety and the overall quality of life on downtown streets,
3. Attracting and retaining new businesses and residents,
4. Cultivating a fun and vibrant downtown "living room",
5. Enhancing property values, sales, and occupancies, and

- 6. Helping downtown businesses compete locally and regionally, thereby retaining and extending tenancies in buildings.

As described in the Management District Plan, it is proposed that the CBD will provide funding for enhanced clean and safe, marketing and communications and special projects, above and beyond those provided by the City of Oakland.

Significant changes proposed for the 2018 CBD that differ from the existing CBD include the following:

- The size of the district is increasing by about five blocks, or roughly a 20% expansion of the service area.
- Assessments for clean and safe services are being increased to enhance service frequencies and keep up with program costs, including labor.
- New funding is proposed to support enhanced communications services and special projects to improve the district.

<b>Name of the District</b>	The proposed special assessment district is a business improvement district which shall be named the "Lake Merritt/Uptown Community Benefit District 2018".
<b>Location</b>	<p>The district boundary encompasses the Lake Merritt-Uptown area around the Broadway corridor roughly bounded by 17<sup>th</sup> Street to the south, Telegraph Avenue to the west, 25<sup>th</sup> Street to the north and Lakeside Drive and Alice Street to the east. Areas are being considered for expansion of the district:</p> <ul style="list-style-type: none"> <li>• A northern extension of the district to 27<sup>th</sup> Street;</li> <li>• A western extension to include both sides of Telegraph Avenue south of 20<sup>th</sup> Street.</li> </ul> <p>Detailed descriptions and maps identifying parcels within the district are provided on pages 8 to 11.</p>
<b>Improvements &amp; Activities</b>	<p><b>A Welcoming, Attractive and Economically Vital Downtown:</b> The CBD will finance improvements and activities that will improve Lake Merritt-Uptown's environment for property owners, residents, workers and visitors, including:</p> <p><b>Safe and Clean Enhancements:</b></p> <ul style="list-style-type: none"> <li>• Maintenance Teams that sweep, scrub and pressure wash sidewalks, remove litter and graffiti, increase the frequency of trash removal and maintain landscaping throughout the District.</li> <li>• Ambassadors that provide visitor information, safety escorts, merchant outreach, city services liaison, event support, homeless services outreach and referrals, and work with local police and business and property owners to prevent crime and address quality of life issues.</li> </ul> <p><b>Marketing and Economic Enhancements:</b></p> <ul style="list-style-type: none"> <li>• Marketing and communications to support CBD activities and improvements and promote a positive image for Lake Merritt-Uptown.</li> <li>• Leadership and collaboration through research and community education to represent the downtown community with one clear voice.</li> <li>• Promote and support local business through marketing programs and city liaison role and attract new businesses and investment that further the strategic goals of the Downtown.</li> </ul>

	<ul style="list-style-type: none"> <li>Promotions to advance Lake Merritt-Uptown's evolution as a regional destination for arts, culture and entertainment.</li> <li>Place-making and activation improvements that make Lake Merritt-Uptown more visually attractive, which may might include: enhanced landscaping, holiday décor, way-finding signage, trash receptacles, streetscape, planters, urban design plans, bike racks, programming of public spaces, etc.</li> </ul>
<b>Method of Financing</b>	Levy of assessments upon real property that benefit from improvements and activities.

<b>Budget</b>	Total district CBD budget for its first year of operations is <b>\$1,545,000</b> as follows:				
	<b>Budget Assumptions</b>	<b>CBD Budget</b>	<b>Less: General Benefit</b>	<b>Assessment TOTAL</b>	<b>% of Total</b>
	<b>Clean &amp; Safe Enhancements</b>	<b>1,050,000</b>	<b>37,016</b>	<b>1,012,984</b>	68.0%
	<b>Marketing &amp; Economic Enhancements</b>				
	Economic Enhancements	179,143			
	Organization	179,142			
	Special Projects Fund	50,000			
	City/County Fees (2.7%)	41,715			
	<b>Sub-Total</b>	<b>450,000</b>		<b>450,000</b>	29.1%
	<b>Reserve</b>	<b>45,000</b>		<b>45,000</b>	2.9%
<b>TOTAL</b>	<b>1,545,000</b>	<b>37,016</b>	<b>1,507,984</b>	<b>100.0%</b>	
<p><b>General Benefit Allowance:</b> An allowance is made for general benefits that the district may provide to either the parcels outside the district boundary or to the public at large. Any CBD services that are found to provide general benefit cannot be paid for with assessment revenue. A certified engineer has estimated that the general benefit from services account for \$37,016 (or 2.4%) of the estimated budget, resulting in a total assessment budget of \$1,507,984.</p>					

<p><b>Cost</b></p>	<p>Annual assessments are based upon an allocation of program costs and a calculation of land plus building square footage and linear frontage. 70% of program costs are allocated to land plus building square footage, and 30% of program costs are allocated to linear frontage. An adjustment for "usable square footage" by residential condominiums is provided. Residential condominiums and properties owned by government will receive full benefit from Safe and Clean Services and will be assessed fully for them; however, residential condominiums and government parcels will not receive the same benefit as commercial parcels from Marketing and Economic Enhancements because those uses are not engaged in commercial or customer attraction activities, thus their assessment will not include that portion of the assessment. All commercial and mixed-use parcels with residential condominium uses will be subject to an adjusted assessment rate for the residential square footage of that parcel. The commercial square footage for that type of parcel will be assessed the assessment rate applied to all commercial parcels. Rental residential units (i.e. apartments) are considered income-producing commercial property and will be assessed at commercial rates, receiving full benefit from all PBID services.</p> <p>Estimated annual assessments for Year 1 of the Lake Merritt-Uptown CBD follow.</p> <table border="1" data-bbox="378 764 1430 953"> <thead> <tr> <th></th> <th>Commercial</th> <th>Government</th> </tr> </thead> <tbody> <tr> <td>Lot Square Foot</td> <td>\$ 0.0780</td> <td>\$ 0.0614</td> </tr> <tr> <td>Building Square Footage</td> <td>\$ 0.0780</td> <td>\$ 0.0614</td> </tr> <tr> <td>Linear Front Footage</td> <td>\$ 9.471</td> <td>\$ 7.457</td> </tr> <tr> <td>Residential Condo/ sq. ft.</td> <td>\$ 0.213</td> <td>n/a</td> </tr> </tbody> </table> <p><b>Rate Adjustment:</b> Over the first ten years of the CBD, rates will have increased a total of about 6%, or less than 1% per year. Meanwhile, all costs of delivering services have increased substantially, including Bay Area wage rates. The rates above project an approximate 10% one-time adjustment over fiscal year 2017-2018 assessment rates. The adjustment is needed to catch up with increasing labor costs associated with the Ambassador program, be more consistent with service investments in peer cities, and to launch new initiatives related to communications and special projects within the district.</p>		Commercial	Government	Lot Square Foot	\$ 0.0780	\$ 0.0614	Building Square Footage	\$ 0.0780	\$ 0.0614	Linear Front Footage	\$ 9.471	\$ 7.457	Residential Condo/ sq. ft.	\$ 0.213	n/a
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Linear Front Footage	\$ 9.471	\$ 7.457														
Residential Condo/ sq. ft.	\$ 0.213	n/a														
<p><b>Cap</b></p>	<p>Following renewal of the District, annual assessments may increase or decrease no more than 5% per year. Annual adjustments in assessment rates will be determined by the Lake Merritt-Uptown CBD Advisory Board which shall then make a recommendation to the City for review and approval by the Oakland City Council.</p>															
<p><b>City Services</b></p>	<p>The City of Oakland will provide an accounting of baseline services that are currently provided within the District and will continue through the duration of the planned renewal. Maintaining baseline services, however, commits no additional City funds beyond what already exists. Proportional reductions to baseline services may occur resulting from changes to the City's overall financial condition.</p>															
<p><b>Collection</b></p>	<p>CBD assessments appear as a separate line item on the annual Alameda County property tax bills.</p>															
<p><b>District Governance</b></p>	<p>The CBD will continue to be managed by the Lake Merritt-Uptown Association (LMUDA) board of directors. A majority of the LMUDA board is composed of property owners and/or their representatives within the CBD.</p>															
<p><b>District Formation</b></p>	<p>Local enabling legislation (Oakland Municipal Code Section 4.48) for CBD district formation requires the submission of petitions signed by property owners in the proposed district who will pay more than 30% of the total assessments (i.e. petitions must represent more than 30% of the \$1,507,984 to be assessed). Petitions are submitted to the</p>															

	Oakland's City Council and the City will mail ballots to all affected property owners. The majority of ballots returned, as weighted by assessments to be paid, must be in favor of the CBD in order for the City Council to consider approval.
<b>Duration</b>	Collection of the first year's assessments will be included in Alameda County's 2018-2019 tax bills. Services will begin January 1, 2019 and continue through December 31, 2028. A five-year review of the district will evaluate market conditions and the need for any adjustments to the Management Plan. Any subsequent renewal of the district will require a new management plan, petition and mail ballot process.

## II. WHY RENEW THE LAKE MERRITT-UPTOWN CBD?

### What is a CBD?

The International Downtown Association estimates that more than 1,000 property-based business improvement districts (or "community benefit districts" (CBD)) currently operate throughout the United States and Canada. **A CBD provides enhanced improvements and activities, such as public safety, maintenance and image enhancement, in addition to those provided by local government.** CBDs provide services that improve the overall viability of business districts, resulting in higher property values, sales and tax revenues. Since the creation of California's Property and Business Improvement District Law in 1994 more than 100 new CBDs have been established in California downtowns and other commercial districts, including Sacramento, Berkeley, San Francisco, Santa Monica and San Jose. In Oakland, there are more than a half dozen CBDs.

### Why Renew the Lake Merritt-Uptown CBD?

- **Creating a Consistently Clean, Welcoming and Attractive Lake Merritt-Uptown Remains a Challenge:** The impetus for creating the CBD in 2008 was to address an inconsistent experience in Lake Merritt-Uptown's public realm – dirty sidewalks, graffiti and occasionally intimidating street behaviors that detracted from visitors' overall experiences. While the CBD has made progress to stabilize the district environment, challenges remain. Continued permissive attitudes, a lack of financial resources at the City of Oakland, statewide growth in street populations, and increasingly brazen behavior have resulted in a decline in perceptions of comfort and safety. Recent stakeholder surveys find reducing homelessness and disruptive street behaviors as one of the district's top priorities.
- **Cultivate Fun & Vibrant Lake Merritt-Uptown "Living Room":** Lake Merritt-Uptown is the civic heart of the City. The CBD aims to attract residents and visitors of all ages to come and enjoy the district, by creating a vibrant and comfortable community gathering place with arts, culture, entertainment, education, recreation, open space, food, shopping, commerce, services, etc.
- **Enhance Property Values, Sales, and Occupancies:** CBDs are a critical mechanism in strengthening the economic foundation of downtowns. The Lake Merritt-Uptown CBD aims to fund improvements and services that enhance the overall economic vitality of the district. Success is measured by higher property values, sales and occupancies.
- **Help Lake Merritt-Uptown Compete:** As a business location and a retail/entertainment destination, Oakland competes with growing business districts throughout the Bay Area and beyond. The CBD provides resources to help Lake Merritt-Uptown strengthen its unique position in this increasingly competitive market.
- **Maintain Ratepayer Control and Accountability:** The Lake Merritt-Uptown District Association Board of Directors ensures that decisions affecting assessments are made by a board with a majority of affected property owners and at least one business owner who is not also a property owner. CBD-financed programs are subject to an annual audit and other private sector performance standards and controls.

### III. THE PROCESS TO DEVELOP THE CBD MANAGEMENT PLAN

The CBD Management Plan is the result of a six-month process to update the Lake Merritt-Uptown District Association's (LMUDA) Strategic Plan. The 2017 Strategic Plan aligns the organization's priorities and structure with the opportunities anticipated over the next five to ten years. The 2017 Strategic Plan process was led by the LMUDA Board of Directors and staff and included input from a LMUDA board strategic planning workshop, stakeholder roundtables and a community survey. More than 300 stakeholders participated in the strategic planning process.

**Priorities** from various groups for the future of downtown's districts were concentrated around the following major themes:

1. Make downtown and uptown **safer and more welcoming** with an emphasis on reducing homelessness and disruptive street behaviors;
2. Continue supplemental **cleaning** in the districts, particularly ongoing graffiti removal.
3. Fill vacant storefronts and **support local businesses**.
4. **Invest in placemaking**, defined as both capital improvements and programming, to create better public amenities and more walkable, bikeable streets;
5. **Increased collaboration** with City and other agencies and stakeholders

**Strategic Plan Vision, Framework & Construct:** To achieve the preceding improvement priorities for downtown Oakland the following construct was developed to guide the next five to ten-year strategic direction for the LMUDA and the Lake Merritt-Uptown District.

<p><b>BRILLIANT AT THE BASICS</b></p>	<p>Initiatives that aim to enhance the clean and safe programs. These actions focus on strengthening the basic principles of clean and safe, with a pronounced effort to address graffiti abatement, and establishing collaborative partnerships to counter issues related to safety and nuisance behavior.</p>
<p><b>BUSINESS DEVELOPMENT &amp; STOREFRONT ACTIVATION</b></p>	<p>Initiatives that aim to enhance the organization's role in helping existing and prospective retail and other businesses thrive, particularly with the end goal of activating vacant ground floor commercial space. Events should be developed that are specifically oriented to support retail. LMUDA should develop the capacity to match prospective merchants with city and nonprofit resources, business planning services, and brokers. Eventually, the organization can play a more prominent role in business recruitment by spearheading new innovative programs or reviving pop-up retail concepts.</p>
<p><b>COMMUNICATIONS &amp; COLLABORATION</b></p>	<p>Initiatives that involve a collaborative approach and effective relationships with city departments and other partners. An activated residential population has the potential to work on behalf of the CBD for affordability and cultural preservation, and to better meet the needs of residents and visitors.</p>



**Implications for CBD Renewal:** The Strategic Plan outlines additional resources and organizational restructuring that may be needed to implement the plan framework, including:

- **Dedication of more resources to clean & safe services**, particularly on the Broadway corridor. Enhancements should be considered to ensure that constant vigilance is maintained to abate graffiti and reduce disruptive behaviors from street populations.
- **Creation of a new staff Communications position** to promote the organization's brand through marketing materials, website and social media, and business support services, and to allow executive leadership to focus more time on big-picture initiatives.
- **Consideration of a Special Projects Fund** to capitalize innovative projects such as pop-up retail.
- **Diversification of revenue sources beyond assessments**, through the legal structure that enables the CBDs to fundraise.

## IV. IMPROVEMENT & ACTIVITY PLAN FOR CBD RENEWAL

### A. CBD Boundaries

The district boundary encompasses the Lake Merritt-Uptown area around the Broadway corridor roughly bounded by 17<sup>th</sup> Street to the south, Telegraph Avenue to the west, 25<sup>th</sup> Street to the north and Lakeside Drive and Alice Street to the east. Areas being considered for expansion of the district:

- A northern extension of the district to 27<sup>th</sup> Street;
- A western extension to include both sides of Telegraph Avenue south of 20<sup>th</sup> Street.

A detailed description and maps of the Lake Merritt-Uptown CBD are provided on the following pages.

#### Detailed District Description

The northern and southern boundaries of the PBID extend roughly from 27<sup>th</sup> Street and Broadway, including Bay Place to the east and 24<sup>th</sup> Street to the west, one parcel east of Telegraph Avenue. The eastern and western boundaries extend roughly to the corner of 17<sup>th</sup> Street and Alice Street and halfway down 18<sup>th</sup> Street between San Pablo Avenue and Telegraph Avenue next to The Fox Theater.

The parcels selected to be included and the PBID form a unique retail, entertainment, commercial and residential core that has become a large portion of what is now recognized as Oakland's Uptown Arts and Entertainment District. Keeping this important office, arts and entertainment district clean, safe and attractive will increase pedestrian traffic and consumer activity and help create a strong symbiotic relationship between the PBID and the customers it serves.

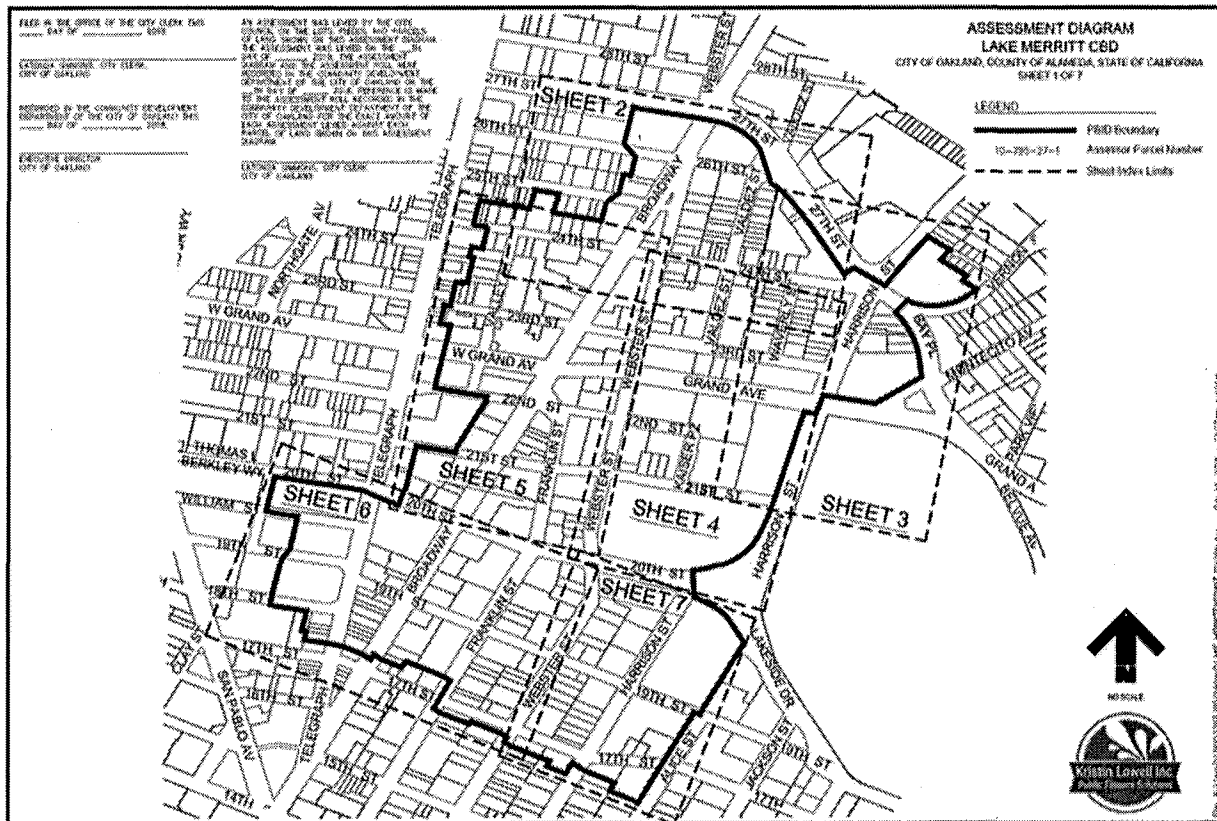
#### PBID Boundary

The boundaries of the Lake Merritt-Uptown District Association in 2019 are described as follows:

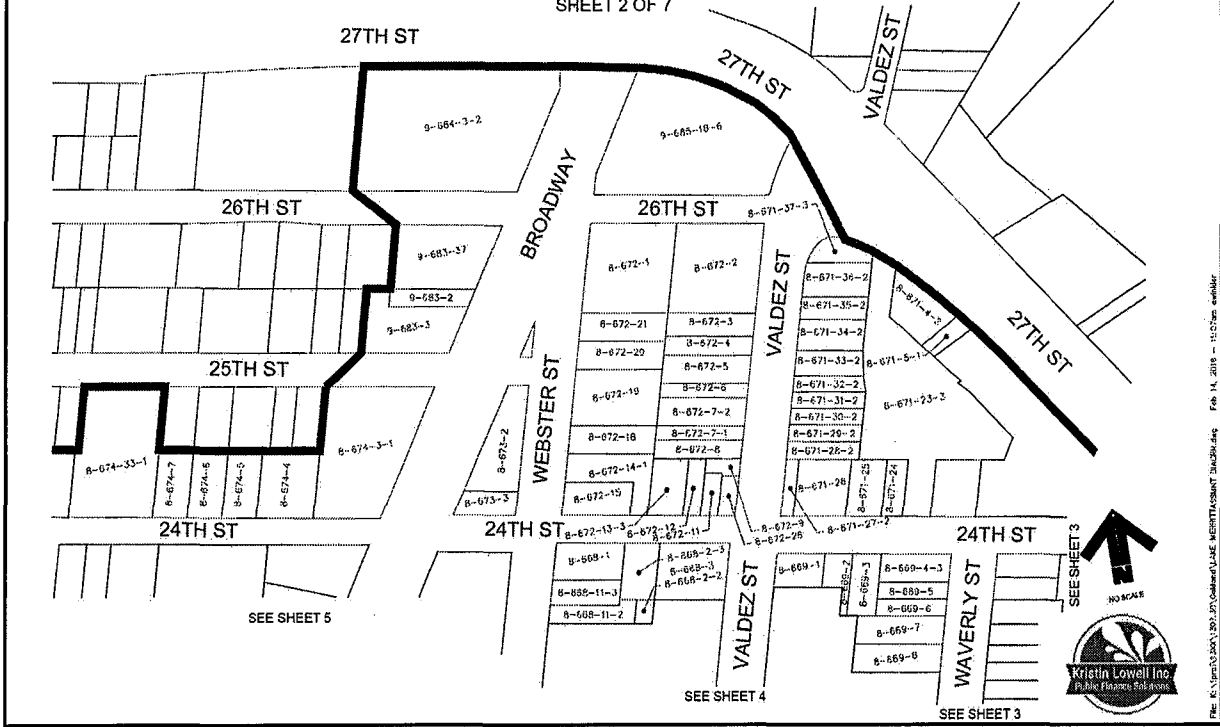
- **Northern Boundary:** Starting at the corner of Grand Avenue and Bay Place, parcel number 10-768-4, running west on the north side of Bay Place to the corner of Vernon Street and Bay Place, parcel number 10-795-27-1, and continuing westward to the corner of 27<sup>th</sup> Street and Harrison Street, parcel number 8-671-20-1, then continuing west along the southern side of 27<sup>th</sup> Street to northeast corner of Broadway, parcel number 9-684-3-2, then moving south along Broadway to the southeast corner of 24<sup>th</sup> and Broadway, parcel number 8-674-3-1 and continuing further west along 24<sup>th</sup> Street until the northern LMUDA boundary meets the eastern boundary of the Koreatown Northgate CBD, parcel number , one parcel to the east the intersection of Telegraph Avenue and 24<sup>th</sup> Street, parcel number 8-674-18.
- **Southern Boundary:** Starting at the southeast corner of 17<sup>th</sup> Street and Alice Street, parcel number 8-626-8, running west along 17<sup>th</sup> Street to where the boundary meets the northern boundary of the Downtown Oakland CBD at the northeast corner of 17<sup>th</sup> Street and Franklin Street, parcel number 8-624-17, one parcel north of the corner of 17<sup>th</sup> Street and Franklin Street, parcel number 8-623-6-1, just one parcel north of the southwest corner of 17<sup>th</sup> Street and Broadway, parcel number 8-623-11, to one block north of the southeast corner of 17<sup>th</sup> Street and Telegraph Avenue, parcel number 8-640-10, to one block north of the southwest corner of 17<sup>th</sup> Street and Telegraph Avenue, parcel number 8-641-4.

- Eastern Boundary:** Starting at the southwest corner of 17<sup>th</sup> Street and Alice Street, parcel number 8-626-8, running north along the west side of Alice Street, including the eastern boundary of Snow Park, and continuing north onto Lakeside Drive to the southeast corner of 20<sup>th</sup> Street and Harrison Street, parcel number 8-635-1, and continuing along the west side of Harrison Street where LMUDA's eastern boundary meets with LMUDA's northern boundary at the southeast corner of Bay Place and Grand Avenue, parcel number 10-768-4.
- Western Boundary:** Starting approximately halfway down 18<sup>th</sup> Street between San Pablo Avenue and Telegraph Avenue next to The Fox Theater, parcel number 8-642-16, running north along the west side of Telegraph Avenue to approximately halfway down 19<sup>th</sup> Street between Telegraph Avenue and San Pablo Avenue, encompassing 1911 Telegraph, parcel number 8-716-58, continuing up Williams Street to the southwest corner of Rashida Muhammad Street and Williams Street, Parcel number 8-716-56, continuing on the east side of Rashida Muhammad Street to 20<sup>th</sup> Street (aka Thomas L. Berkeley Street) to the southwest corner of 20<sup>th</sup> Street and Telegraph Avenue, continuing north along the north side of 20<sup>th</sup> Street, parcel number 8-649-9, then continuing to the backside of the Paramount Theatre on 21<sup>st</sup> Street, parcel number 8-648-18, continuing down 22<sup>nd</sup> Street to one parcel east of Telegraph Avenue, parcel number 8-658-10, continuing north along the eastern boarder of the Koreatown Northgate CBD to 24<sup>th</sup> Street, parcel number 8-674-18.

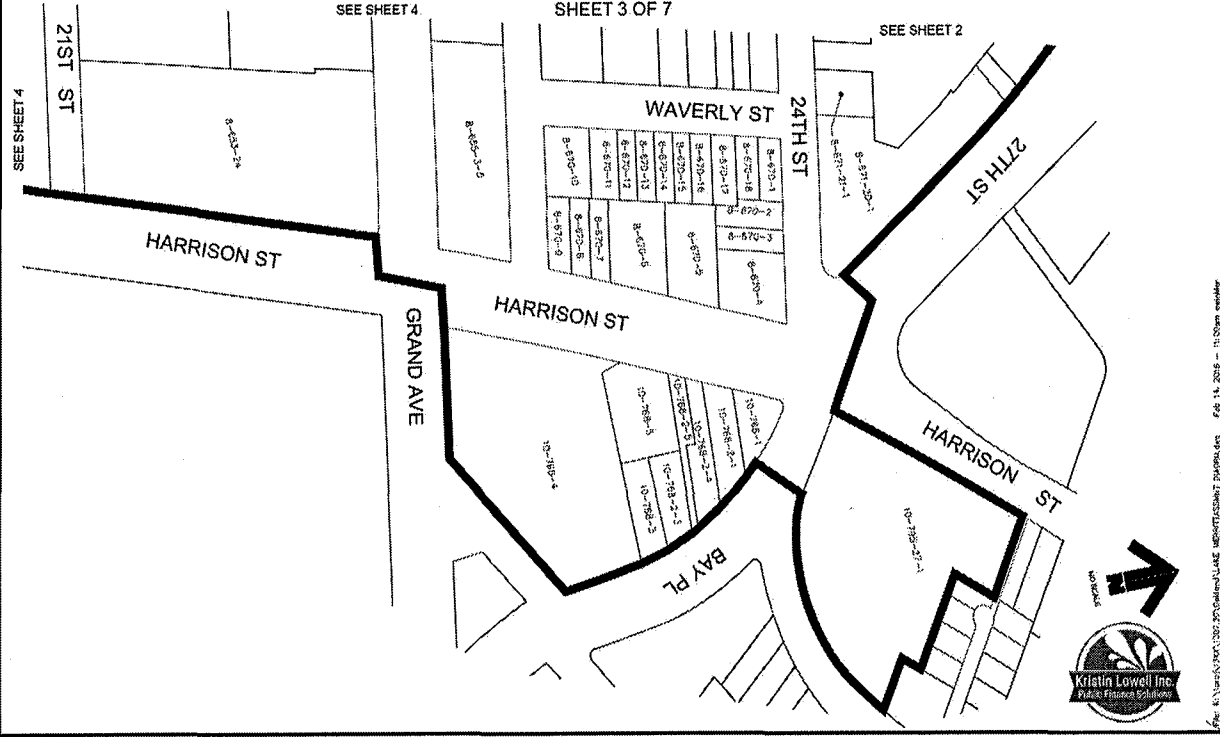
### District Maps



ASSESSMENT DIAGRAM  
 LAKE MERRITT CBD  
 CITY OF OAKLAND, COUNTY OF ALAMEDA, STATE OF CALIFORNIA  
 SHEET 2 OF 7

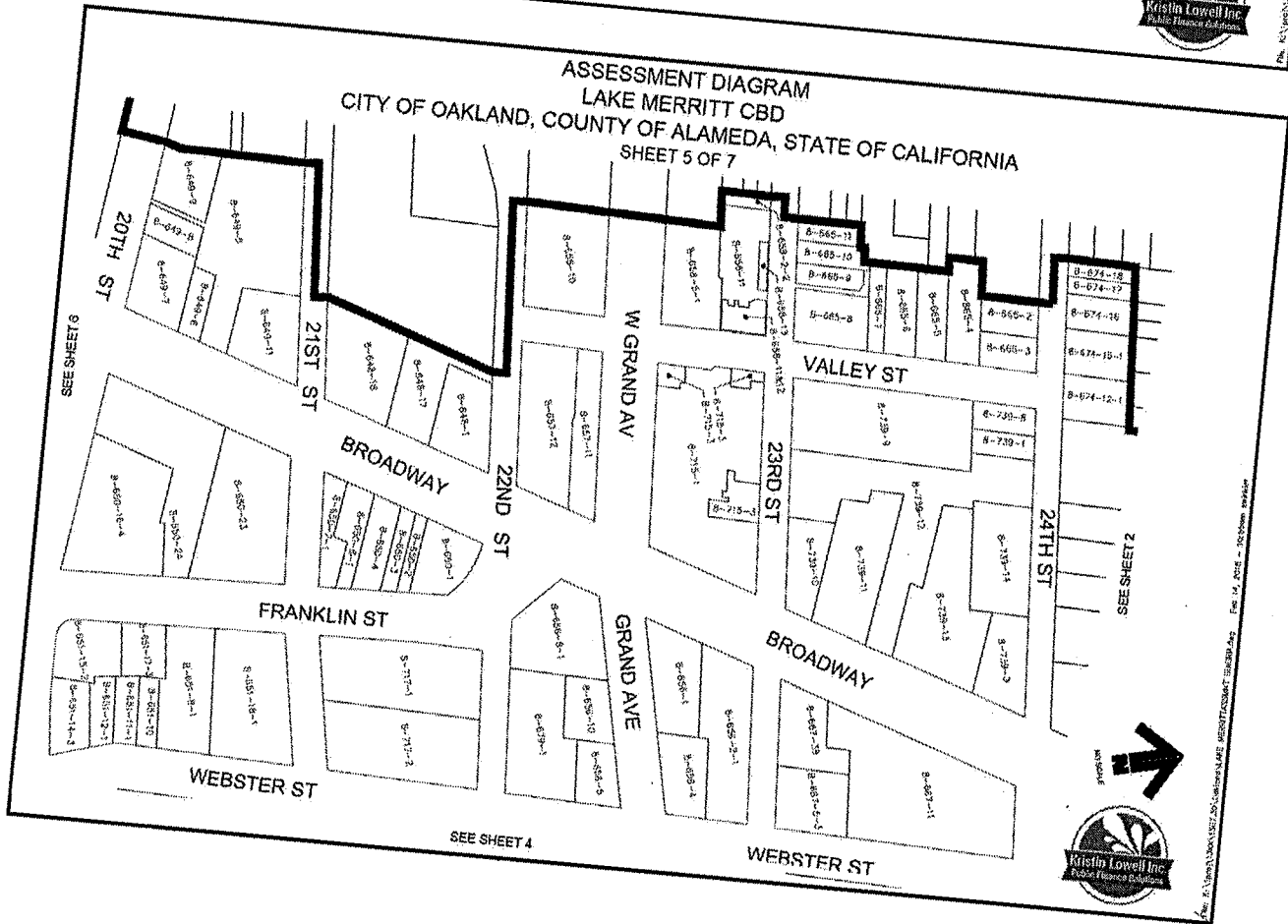
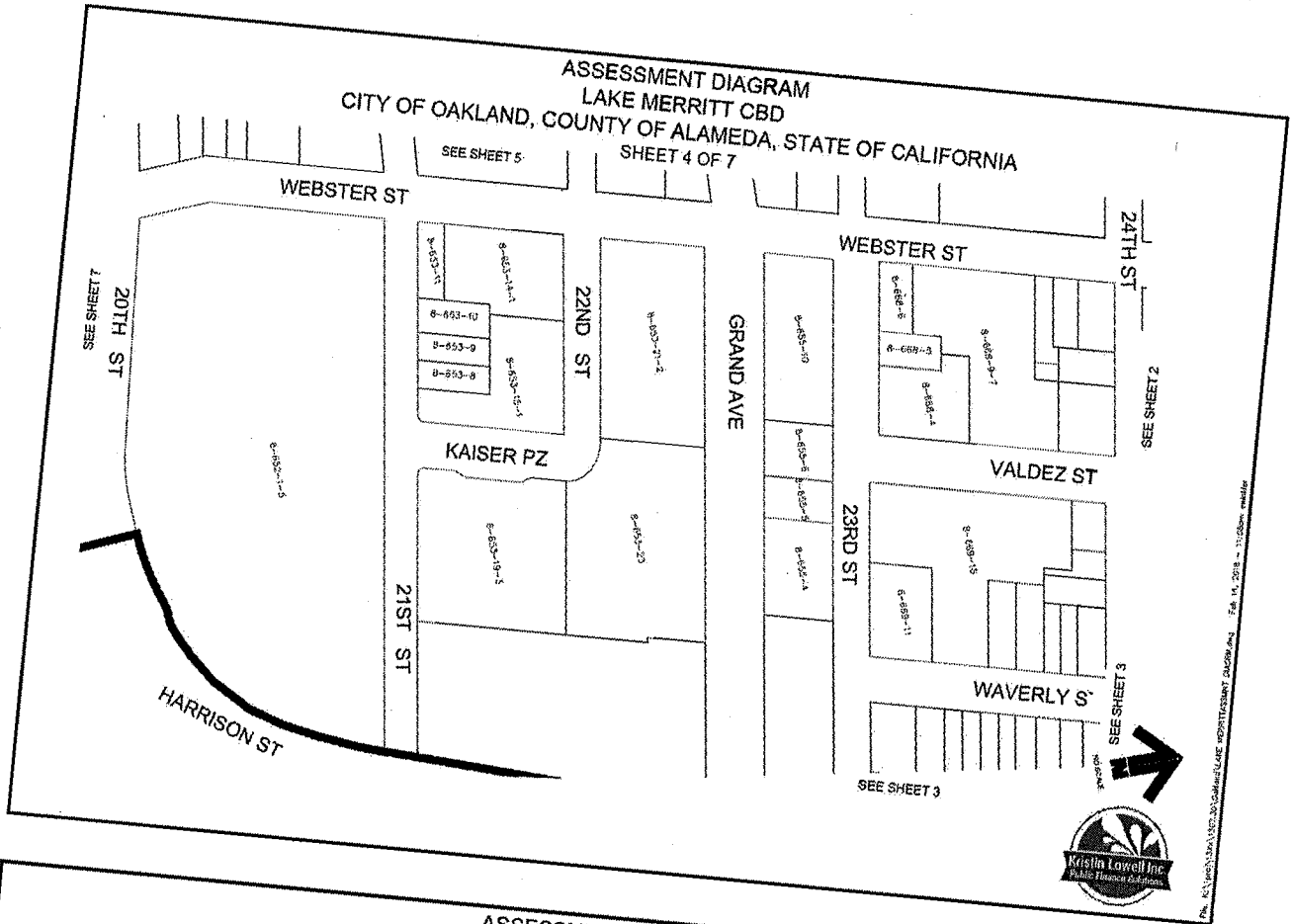


ASSESSMENT DIAGRAM  
 LAKE MERRITT CBD  
 CITY OF OAKLAND, COUNTY OF ALAMEDA, STATE OF CALIFORNIA  
 SHEET 3 OF 7

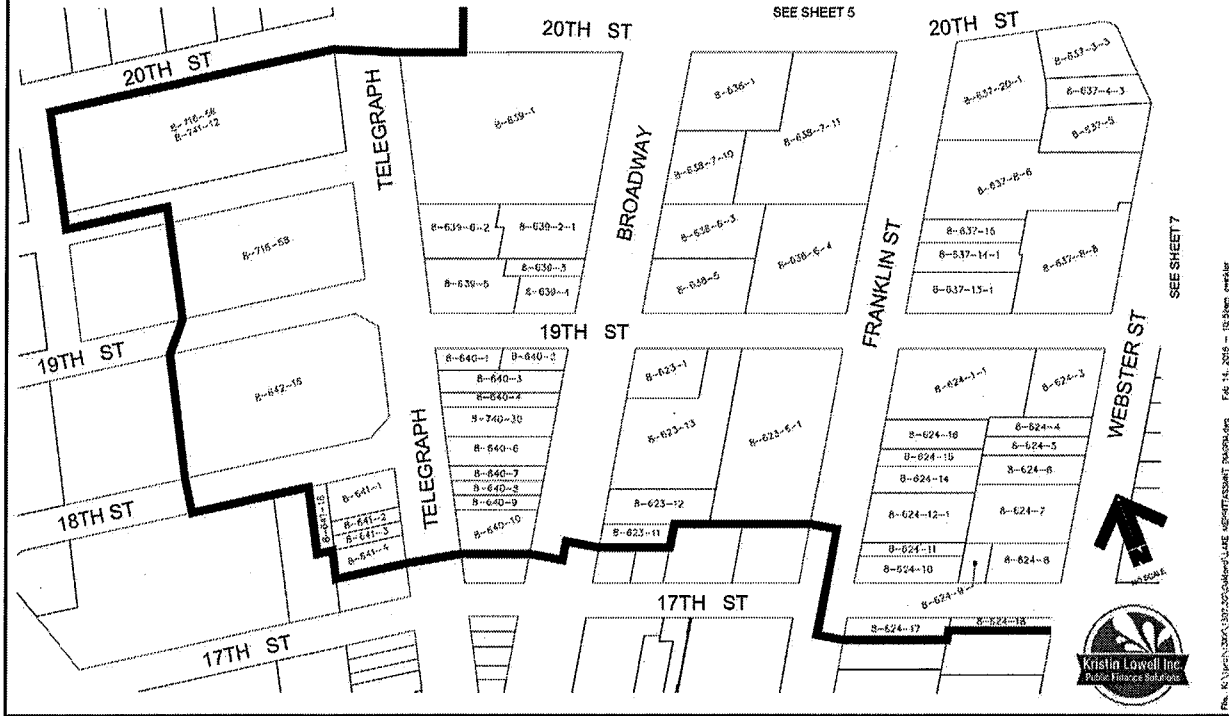


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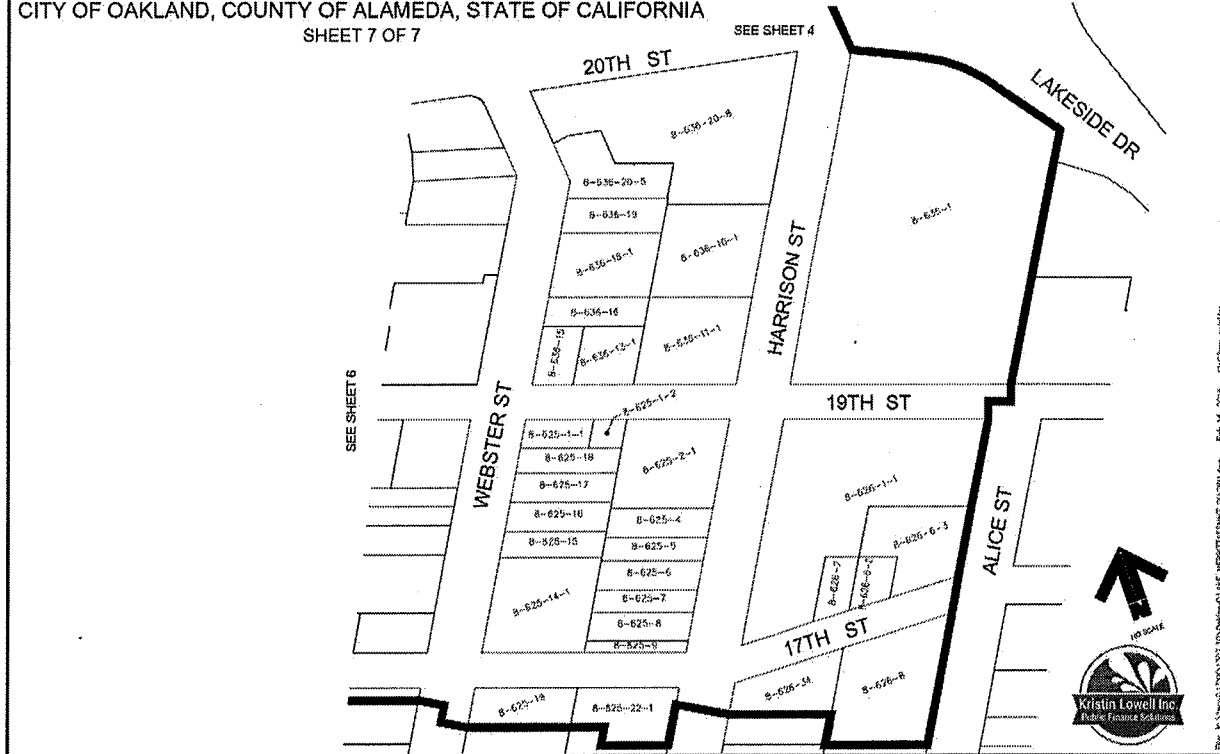
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ASSESSMENT DIAGRAM  
 LAKE MERRITT CBD  
 CITY OF OAKLAND, COUNTY OF ALAMEDA, STATE OF CALIFORNIA  
 SHEET 6 OF 7



ASSESSMENT DIAGRAM  
 LAKE MERRITT CBD  
 CITY OF OAKLAND, COUNTY OF ALAMEDA, STATE OF CALIFORNIA  
 SHEET 7 OF 7



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## **B. Work Program**

The work program aims to deliver on the core purpose of the CBD is to create and sustain a vibrant and prosperous Lake Merritt-Uptown district by:

1. Producing a consistently clean, welcoming, and attractive experience,
2. Attracting and retaining new businesses,
3. Cultivating a fun and vibrant downtown "living room",
4. Enhancing property values, sales, and occupancies, and
5. Helping Lake Merritt-Uptown businesses compete locally and regionally, thereby retaining and extending tenancies in buildings.

Services are bundled into two primary activity centers: "Safe and Clean" and "Marketing and Economic" enhancements. The Safe and Clean services include efforts to make the district clean and welcoming. Marketing and economic enhancements include a variety of initiatives aimed to improve the district business climate, including support for local businesses, attracting new investment, strengthening the district's arts and culture niche, and marketing and communications to promote all CBD services and improve Lake Merritt-Uptown's overall image.

### **SAFE & CLEAN ENHANCEMENTS**

#### **Cleaning & Hospitality Ambassadors:**

To respond to stakeholder priorities and guiding principles to make downtown and uptown districts both more welcoming, clean and beautiful, the CBD funded Ambassador program will be strengthened moving forward.

In Lake Merritt-Uptown, the Ambassador program has been a critical element to stabilize streets. Key accomplishments delivered in the Lake Merritt-Uptown CBD over the past year include:

- 14 ambassadors provide an average deployment of 550 hours per week
- Each ambassador walks more than seven miles each day
- More than 69 tons of trash were collected from district streets
- Crews removed more than 7,700 tags of graffiti

Despite the progress to-date from the Ambassador program, challenges remain. California's prolonged drought conditions are requiring new approaches and equipment to replace less expensive practices that relied on the unrestricted use of water. Plus, permissive civic attitudes that tolerate street populations and disruptive behaviors coupled with a statewide increase in homelessness have led to more intimidation and less comfort on streets. On behalf of downtown and uptown business and property owners, the CBD and LMUDA continue to search for compassionate solutions and partnerships that will restore more orderly conduct, and create a welcoming environment for everyone.

The Management Plan provides for an increase in funding for Cleaning and Hospitality Ambassadors to allow for increases in program labor costs. Estimated deployment of Ambassadors is anticipated as follows:

<b>Maintenance Services</b>	<b>Frequency</b>
Average Weekly Coverage	7 days/week
Litter removal/pan & broom	Daily as needed
Detail cleaning of public amenities	Daily as needed
Graffiti removal	Daily as needed
Weed removal	Daily as needed
Pressure washing/spot cleaning	Daily as needed
Pressure washing/strategic hot spots	Daily as needed
<b>Safety Services</b>	<b>Frequency</b>
Coverage in All Areas	7 days/week 8 to 16 hours
Primary method of coverage	Foot and Bike patrols
Business contacts	Daily
Visitor contacts	Daily
Outreach with street populations	Daily
Reporting	Daily

Clean and safe enhancements account for 68.0% of the annual CBD budget.

#### **MARKETING & ECONOMIC ENHANCEMENTS**

A comprehensive economic vitality program has been included as a key component of the Lake Merritt-Uptown CBD. The prior management plan was designed during a period of economic recession, hence activities were highly focused on clean and safe services to stabilize the district environment. Given a more favorable economic climate, and acknowledging demographic and lifestyle trends that are supportive of continued investment in urban districts, the areas of for economic enhancements have expanded as outlined in the Strategic Plan to include:

- **Business Support and Innovation:** Downtown and Uptown are first and foremost a center for commerce providing both primary jobs and retail. For retail, Lake Merritt-Uptown will aim to strengthen its existing offerings and position for local unique dining and shopping. The CBD will fund efforts aimed at attracting new tenants and investment and promote continued mixed use development that includes retail, office, housing and cultural uses.
- **Arts, Culture, Entertainment:** Advance Lake Merritt-Uptown's evolution as a regional destination for arts, culture and entertainment. The district has a rich and varied collection of arts and cultural venues. Arts, culture and entertainment creates a differential advantage for the district and adds to the quality of life for Oakland residents. The CBD will provide leadership and programs to enhance Lake Merritt-Uptown's image as a unique arts and cultural destination.
- **Marketing and Communications:** Marketing and communications efforts will be strengthened to support all components of the CBD Management Plan. Marketing related to clean and safe services will create awareness of cleaning, hospitality, beautification and placemaking changes being made to improve the district, and promote the vision designed by the community and inspire stakeholder engagement. Marketing related to the economic development portion of the work program will: advance the image and branding of the Lake Merritt-Uptown; highlight the unique startup



innovation and arts, culture and entertainment character of the district; attract new and returning visitors to live, work, eat, drink, play, engage, and be inspired; support new investment opportunities for retail, office and housing; and promote easy and affordable access via transit and parking.

- **Collaboration:** The CBD will support research and community education efforts that help to evaluate the impacts of policies and issues on the Lake Merritt-Uptown business and investment climate. The CBD will support efforts to advance policies that improve the district's overall quality of life and economic and cultural vitality.

### **Special Projects**

The CBD will include funds to invest in highly visible improvements that will add to the attractiveness of public spaces throughout Lake Merritt-Uptown. Improvements may include:

- Landscaping, planters, hanging flower baskets and other green elements.
- Seasonal holiday decorations and banners.
- Cosmetic capital improvements, including street furniture, information kiosks, pedestrian lighting and other amenities.
- Wayfinding and directional signage to help visitors navigate through the district.
- Temporary and permanent public art installations.
- Installation of bicycle racks and other amenities to encourage bicycle use.
- Promote the installation and use of bike-share, car-share and other innovative mobility options.
- Programming and events within public spaces.
- Planning and design processes to improve public spaces throughout the district.
- Other improvements as determined year-to-year by the LMUDA board of directors.

### **Management, Administration and Reserve**

Like any business, the CBD requires a professional staff to properly manage programs, communicate with stakeholders and provide leadership. To reduce administrative costs, increase leveraging of funds and avoid duplication of enhanced services, this plan anticipates that the day-to-day services financed by the CBD will continue to be managed by the Lake Merritt-Uptown District Association (LMUDA). CBD funds can be further leveraged by sponsorships from special events, contracts, grants, parking meter revenues and earned income. Administrative costs include:

- Accounting and annual financial review and/or audit
- Insurance
- Program support costs including supplies, equipment and rent
- Costs of assessment collection and administration from both the City (1.0%) and the County (1.7%)
- Other administration costs associated with the overhead and administrative support of programs.

A reserve is also budgeted to provide a contingency for unforeseen program needs and to provide a cushion for assessment delinquencies. Reserve funds can also be utilized to pay for costs associated with CBD renewal.

32.0% of the CBD budget is allocated to support economic and marketing initiatives, including program management, administration and reserve.

### C. Plan Budgets

The total improvement and activity plan budget for the first year of the district is projected at \$1,545,000 with the following components:

Budget Assumptions	CBD Budget	Less: General Benefit	Assessment TOTAL	% of Total
<b>Clean &amp; Safe Enhancements</b>	<b>1,050,000</b>	<b>37,016</b>	<b>1,012,984</b>	<b>68.0%</b>
<b>Marketing &amp; Economic Enhancements</b>				
Economic Enhancements	179,143			
Organization	179,142			
Special Projects Fund	50,000			
City/County Fees (2.7%)	41,715			
<b>Sub-Total</b>	<b>450,000</b>		<b>450,000</b>	<b>29.1%</b>
<b>Reserve</b>	<b>45,000</b>		<b>45,000</b>	<b>2.9%</b>
<b>TOTAL</b>	<b>1,545,000</b>	<b>37,016</b>	<b>1,507,984</b>	<b>100.0%</b>

Non-assessment funding will need to be raised to cover the cost associated with general benefits from services.

#### Ten Year Operating Budget

A projected 10-year operating budget for the Lake Merritt-Uptown CBD is provided on the following page. Projections for the budget are based upon the following assumptions:

- Total program revenue increases no more than 5% per year, the maximum allowed under the proposed annual budget adjustment to respond to increases in program costs. Actual budgets may not increase 5% as determined by the LMUDA, which is the Owner's Association for the Lake Merritt-Uptown CBD.
- Revenues for specific activities within the general activity categories (i.e. Clean and Safe and Marketing and Economic enhancements) may be reallocated among specific activities from year to year based upon district needs and budgets developed by the LMUDA board of directors. Up to 10% of revenues may be moved between the Clean and Safe and Marketing and Economic Enhancement categories.

## V. ASSESSMENTS

### A. Assessment Methodology

To develop the CBD assessment methodology, the consulting team includes Kristin Lowell Inc., a certified engineer. *Additional information and justification for the assessment methods and adjustments are provided in the Engineer's Report, prepared by Kristin Lowell Inc. and provided as an Exhibit to the Management Plan.*

Service benefits are distributed to lot and building square footage and linear front footage through a "cost allocation" approach — the costs of specific services are allocated to the assessment variables that benefit most from services. As designed in the initial CBD plan from 2008, Lot and building square footage and linear frontage are the key variables for the assessment methodology:

- **Lot Square Footage and Linear Front Footage:** Lot square footage and linear front footage are utilized to assess the benefit of services to the ground level of properties.
- **Building Square Footage:** Building square footage is utilized to assess the benefit from services to buildings, including tenants, residents and employees thereby retaining and extending tenancies in buildings.

Service benefits are greater to ground floor uses since services will make sidewalks and the public realm cleaner, safer and more attractive. Acknowledging these greater benefits, the sum of lot, linear frontage plus building will effectively place more emphasis on the ground level of buildings.

**Property Use Considerations:** The methodology provides the following treatments for property used exclusively for residential condominiums and parking structures:

- **Treatment of Residential Condominiums and Government Property:** Residential condominiums and properties owned by government will receive full benefit from Environment Services (i.e. clean and safe) and will be assessed fully for them; however, residential condominiums and government parcels will not receive the same benefit as commercial parcels from Economy Services (i.e. marketing, special events and economic development) because those uses are not engaged in commercial or customer attraction activities, thus their assessment will not include that portion of the assessment. All commercial and mixed-use parcels with residential condominium uses will be subject to an adjusted assessment rate for the residential square footage of that parcel. The commercial square footage for that type of parcel will be assessed the assessment rate applied to all commercial parcels. Rental residential units (i.e. apartments) are considered income-producing commercial property and will be assessed at commercial rates, receiving full benefit from all PBID services.

The resulting adjustment for residential condominiums and government property is 78.74% of the full assessment rate, and includes the following assessment components:

	Share of Full Commercial Assessment
Full Share of Clean & Safe Service Benefit	67.96%
Proportional Share of Organization Budget	8.80%
Proportional Share of Reserve	1.98%
<b>Total Adjusted Share of Commercial Rate</b>	<b>78.74%</b>

- **Treatment of Parking Structures:** Parking structures receive different levels of benefit from CBD improvements and services based upon their use and ownership. Parking structures will be subject to one of the following methodologies:
  - a. Parking structure square footage that is integrated within and/or dedicated to a building, has the same ownership as the building, and the building has uses in addition to parking where parking is just an ancillary use, does not receive benefit from the CBD services and therefore square footage of the parking structure will not be assessed.
  - b. Stand-alone parking structures that are not ancillary to a building, will receive the full benefit from CBD improvements and activities and will be assessed at standard assessment rates.

## B. Calculation of Assessments

The preceding methodology is applied to a database that has been constructed by the Lake Merritt-Uptown District Association and the City of Oakland. Property data is first obtained from the Alameda County Assessor's Office through the City of Oakland. A list of properties included in the CBD is provided within the *Appendix*.

The assessment methodology is based on the following construct:

- Seventy percent (70%) of the assessment is applied to lot and building square footage, and thirty percent (30%) of the assessment is applied to linear frontage.

**Total Estimated Assessments:** Based upon the methodology, property data and the proposed CBD budget, approximate lot and building assessments are calculated. Assessments will not exceed the following amounts during the first year of the renewed CBD:

Property Characteristic	Commercial	Government
Lot Square Foot	\$ 0.0780	\$ 0.0614
Building Square Footage	\$ 0.0780	\$ 0.0614
Linear Front Footage	\$ 9.471	\$ 7.457
Residential Condo/ sq. ft.	\$ 0.213	n/a

To calculate an annual assessment, the preceding rates are applied to property data. The following examples offer a calculation for a commercial property and a residential condominium.

Commercial Property	Dimension	Rate	Sub-Total
Lot Square Footage	5,000	0.0780	\$ 390.00
Building Square Footage	10,000	0.0780	\$ 780.00
Linear Frontage	100	9.471	\$ 947.10
<b>TOTAL ANNUAL ASSESSMENT</b>			<b>\$ 2,117.10</b>

Residential Condominium	Dimension	Rate	Total
Livable Square Footage	2,000	0.213	\$ 426.00

### C. Assessment Adjustments

**Annual Adjustment:** Assessment rates may be adjusted for changes in programs costs, not to exceed 5%. Actual annual adjustments may range from a decrease of 5% to an increase of 5%. Assessment rates will not exceed the levels shown in the Ten Year Operating Budget and Maximum Assessment exhibit.

**Budget Process:** A balanced budget approach is utilized to develop each annual budget within the constraints of the assessment rates. Any annual budget surplus or deficit is tracked by program. Prior year surpluses may be used as deemed necessary by the LMUDA board of directors based on the allocations described in the Management District Plan.

**General Benefit Adjustment:** The Lake Merritt-Uptown CBD's Engineer's Report has found that the CBD may provide general benefit (i.e. benefits to the general public or surrounding properties) that is intangible and unquantifiable. To account for any general benefit an adjustment has been established. Accordingly, \$37,016 (or 2.4%) must be funded by non-assessment revenue in the first year of the CBD, and a proportional amount in subsequent years. A detailed analysis is provided in Engineer's Report, attached as Exhibit A.

**Time and Manner for Collecting Assessments:** As provided by state law, the Lake Merritt-Uptown CBD assessment appears as a separate line item on annual property tax bills prepared by Alameda County. Property tax bills are distributed in the fall and payment is expected by lump sum or installment. Existing laws for enforcement and appeal of property taxes apply to CBD assessments.

**Disestablishment:** State law and the Oakland Municipal Code provide for the disestablishment of a CBD pursuant to an annual review process. Each year that the CBD is in existence, there will be a 30-day period during which the property owners will have the opportunity to request disestablishment of the District. This 30-day period begins each year on the anniversary day that the district was first established by City Council. Within that 30-day period, if a written petition is submitted by the owners of real property who pay more than 50 percent (50%) of the assessments levied, the CBD may be disestablished. The City Council will hold a public hearing on disestablishing the CBD prior to actually doing so.

**Issuance of Bonds:** No bonds or other bonded debt is to be issued to finance activities and improvements envisioned in the Management District Plan. If the LMUDA decides to issue bonds or

other bonded debt in the future that increases the term and/or assessment rates set in this Plan, revisions to the Management Plan will require new petition and mail ballot procedures.

## **VI. GOVERNANCE**

The Lake Merritt-Uptown District Association (LMUDA), a 501(c)3 California nonprofit corporation, will continue to be the management corporation board for the renewed CBD. The role of the management corporation is consistent with similar CBDs and downtown management organizations throughout California and the nation. As part of the Management Plan, the LMUDA, working as the management corporation board, oversees the delivery of day-to-day CBD services in order to:

- Reduce overall administrative costs of the CBD;
- Leverage CBD funds with other resources, programs and capabilities provided by the Lake Merritt-Uptown Association;
- Eliminate the potential for duplication of enhanced services and activities;
- Ensure that Downtown is represented by a unified voice.

Pursuant to section 4.48.190(B) of the City of Oakland Municipal Code and State of California CBD legislation, the LMUDA, when conducting CBD business, is subject to disclosure and notification guidelines set by the Ralph M. Brown Act and California Public Records Act.

The LMUDA has configured its Board of Directors to represent all geographic areas and land uses within the CBD. The goal and spirit of the board's composition is to have a majority of property owners, but also include representatives from district businesses, residents and other entities that pay CBD assessments. Board members are selected through a nominating process that invites all stakeholders to participate. A nominating committee develops an annual slate of board nominations, and nominations are voted on at an annual meeting of CBD ratepayers.

# Lake Merritt Community Benefit District

## Engineer's Report



**Oakland, California  
April 2018**

***Prepared by:*  
Kristin Lowell Inc.**

*Article XIID of the California State Constitution and the State of California Property and Business Improvement District Law of 1994 and augmented by the City of Oakland Business Improvement Management District Ordinance 12190, Chapter 4.48 of the Oakland Municipal Code, as amended July 21, 2015 to authorize a Community Benefit District*

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## ENGINEER'S STATEMENT

This Report is prepared pursuant to Article XIID of the California State Constitution and the State of California Property and Business Improvement District Law of 1994 and augmented by the City of Oakland Business Improvement Management District Ordinance 12190, Chapter 4.48 of the Oakland Municipal Code, as amended July 21, 2015.

This Business Improvement District will be referred to as the Lake Merritt Community Benefit District 2018 ("CBD") will provide activities either currently not provided or are above and beyond what the City of Oakland provides. These activities will specially benefit each individual assessable parcel in the CBD. Every individual assessed parcel within the CBD receives special benefit from the activities identified under Section B of this Report. Only those individual assessed parcels within the CBD receive the special benefit of these proposed activities; parcels contiguous to and outside the CBD and the public at large may receive a general benefit, as outlined in Section E. The cost to provide general benefits, if any, will be funded from sources other than special assessments.

The duration of the proposed CBD is ten (10) years, commencing January 1, 2019. An estimated budget for the CBD improvements and activities is set forth in Section D. Assessments will be subject to an annual increase or decrease of up to 5% per year as determined by the Advisory Board. Assessment increases/decreased must stay between 0% and 5% in any given year. Funding for the CBD improvements and activities shall be derived from a property-based assessment of each specially benefitted parcel in the CBD. A detailed description of the methodology for determining the proportional special benefit each individual assessable parcel receives from the service and the assessment for each parcel is set forth in Section F.

I hereby certify to the best of my professional knowledge that each of the identified assessable parcels located within the CBD will receive a special benefit over and above the benefits conferred to those parcels outside of the CBD boundary and to the public at large and that the amount of the proposed special assessment is proportional to, and no greater than the special benefits received.



Respectfully submitted,

Terrance E. Lowell, P.E.

## SECTION A: LEGISLATIVE AND JUDICIAL REVIEW

### Property and Business Improvement District Law of 1994

The Property and Business Improvement District Law of 1994 (the "State Law") is the legislation that authorizes the City to levy assessments upon real property for the purposes of providing improvements and activities that specially benefit each individual assessed parcel in the CBD. The purpose of the CBD is to encourage commerce, investment, and business activities. In order to meet these goals CBDs typically fund activities and improvements, such as, enhanced safety and cleaning. Unlike other assessment districts which fund the construction of public capital improvements or maintenance thereof, CBDs provide activities and improvements "to promote the economic revitalization and physical maintenance of the business districts of its cities in order to create jobs, attract new businesses, and prevent the erosion of the business districts." (Streets and Highways Code Section 36601(b)). The improvements and activities funded through the CBD are over and above those already provided by the City within the CBD's boundaries. Each of the CBD activities or improvements is intended to increase building occupancy and lease rates, to encourage new business development, attract businesses that benefit the parcels, and improve the economic vitality of parcels.

Specifically, the State Law defines "Improvements" and "Activities" as follows:

*"Improvement" means the acquisition, construction, installation, or maintenance of any tangible property with an estimated useful life of five years..."*<sup>1</sup>

*"Activities" means, but is not limited to, all of the following:*

- (a) Promotion of public events which benefit businesses or real property in the district.*
- (b) Furnishing of music in any public place within the district.*
- (c) Promotion of tourism within the district.*
- (d) Marketing and economic development, including retail retention and recruitment.*
- (e) Providing safety, sanitation, graffiti removal, street and sidewalk cleaning, and other municipal services supplemental to those normally provided by the municipality.*
- (f) Activities which benefit businesses and real property located in the district.*<sup>2</sup>

### Article XIID of the State Constitution

In 1996, California voters approved Proposition 218, codified in part as Article XIID of the State Constitution. Among other requirements, Article XIID changes the way local agencies enact local taxes and levy assessments on real property. It states, in relevant part, that:

*(a) An agency which proposes to levy an assessment shall identify all parcels which will have a special benefit conferred upon them and upon which an assessment will be imposed. The proportionate special benefit derived by each identified parcel shall be determined in relationship to the entirety of the capital cost of a public improvement, the maintenance and operation expenses of a public improvement, or the cost of the property related service being provided. No assessment shall be imposed on any parcel which exceeds the reasonable cost of the proportional special benefit conferred on that parcel. Only special benefits are assessable, and an agency shall separate the general benefits*

<sup>1</sup> California Streets and Highways Code, Section 36610.

<sup>2</sup> California Streets and Highways Code, Section 36613.

*from the special benefits conferred on a parcel. Parcels within a district that are owned or used by any agency, the State of California or the United States shall not be exempt from assessment unless the agency can demonstrate by clear and convincing evidence that those publicly-owned parcels in fact receive no special benefit.*

*(b) All assessments shall be supported by a detailed engineer's report prepared by a registered professional engineer certified by the State of California.<sup>3</sup>*

*"Special benefit" means a particular and distinct benefit over and above general benefits conferred on real property located in the district or to the public at large. General enhancement of property value does not constitute "special benefit."<sup>4</sup>*

### **Judicial Guidance**

Since the enactment of Article XIID, the courts have rendered opinions regarding various aspects of Article XIID. The notable portions of cases that apply to assessment districts in general and this Lake Merritt CBD in particular are noted below.

*"The engineer's report describes the services to be provided by the CBD [i.e. the CBD]; (1) security, (2) streetscape maintenance (e.g., street sweeping, gutter cleaning, graffiti removal), and (3) marketing, promotion, and special events. They are all services over and above those already provided by the City within the boundaries of the CBD. And they are particular and distinct benefits to be provided only to the properties within the CBD, not to the public at large—they 'affect the assessed property in a way that is particular and distinct from [their] effect on other parcels and that real property in general and the public at large do not share."<sup>5</sup>*

*"...separating the general from the special benefits of a public improvement project and estimating the quantity of each in relation to the other is essential if an assessment is to be limited to the special benefits."<sup>6</sup>*

*"...the agency must determine or approximate the percentage of the total benefit conferred by the service or improvement that will be enjoyed by the general public and deduct that percentage of the total cost of the service or improvement from the special assessment levied against the specially benefitted property owners."<sup>7</sup>*

*"...even minimal general benefits must be separated from special benefits and quantified so that the percentage of the cost of services and improvements representing general benefits, however slight, can be deducted from the amount of the cost assessed against specially benefitting properties."<sup>8</sup>*

The contents of this Engineer's Report are prepared in compliance with the above noted authorizing legislation, the State Constitution and the judicial opinions.

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<sup>3</sup> Section 4, Article XIID of the State Constitution.

<sup>4</sup> Section 2 (i), Article XIID of the State Constitution.

<sup>5</sup> Dahms v. Downtown Pomona Property and Business Improvement District (2009) 174 Cal.App. 4th 708, 722.

<sup>6</sup> Beutz v. County of Riverside (2010) 184 Cal. App. 4th 1516, 1532.

<sup>7</sup> Golden Hill Neighborhood Association, Inc. v. City of San Diego (2011) 199 Cal.App. 4th 416, 438.

<sup>8</sup> Golden Hill Neighborhood Association, Inc. v. City of San Diego (2011) 199 Cal.App. 4th 416, 439.

## **SECTION B: IMPROVEMENTS AND ACTIVITIES**

The Lake Merritt property owners and business owners collectively determined the priority for improvements and activities that the CBD will deliver are Cleaning and Hospitality Ambassadors, as well as Marketing and Economic Development activities. Specifically, the Lake Merritt CBD shall provide the following activities.

### ***Cleaning and Hospitality Ambassadors***

To respond to stakeholder priorities and guiding principles to make downtown and uptown districts both more welcoming, clean and beautiful, the CBD funded Ambassador program will be strengthened moving forward.

In Lake Merritt-Uptown, the Ambassador program has been a critical element to stabilize streets. Key accomplishments delivered in the Lake Merritt-Uptown CBD over the past year include:

- 14 ambassadors provide an average deployment of 550 hours per week
- Each ambassador walks more than seven miles each day
- More than 69 tons of trash were collected from district streets
- Crews removed more than 7,700 tags of graffiti

Despite the progress to-date from the Ambassador program, challenges remain. California's prolonged drought conditions are requiring new approaches and equipment to replace less expensive practices that relied on the unrestricted use of water. Plus, permissive civic attitudes that tolerate street populations and disruptive behaviors coupled with a statewide increase in homelessness have led to more intimidation and less comfort on streets. On behalf of downtown and uptown business and property owners, the CBD and LMUDA continue to search for compassionate solutions and partnerships that will restore more orderly conduct, and create a welcoming environment for everyone.

The Management Plan provides for an increase in funding for Cleaning and Hospitality Ambassadors to allow for increases in program labor costs. Estimated deployment of Ambassadors is anticipated as follows:

Maintenance Services	Frequency
Average Weekly Coverage	7 days/week
Litter removal/pan & broom	Daily
Detail cleaning of public amenities	Daily
Graffiti removal	Daily as needed
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### **Marketing and Economic Enhancements**

A comprehensive economic vitality program has been included as a key component of the Lake Merritt-Uptown CBD. The prior management plan was designed during a period of economic recession, hence activities were highly focused on clean and safe services to stabilize the district environment. Given a more favorable economic climate, and acknowledging demographic and lifestyle trends that are supportive of continued investment in urban districts, the areas for economic enhancements have expanded as outlined in the Strategic Plan to include:

- Business Support and Innovation:** Downtown and Uptown are first and foremost a center for commerce providing both primary jobs and retail. For retail, Lake Merritt-Uptown will aim to strengthen its existing offerings and position for local unique dining and shopping. The CBD will fund efforts aimed at attracting new tenants and investment and promote continued mixed use development that includes retail, office, housing and cultural uses.
- Arts, Culture, Entertainment:** Advance Lake Merritt-Uptown's evolution as a regional destination for arts, culture and entertainment. The district has a rich and varied collection of arts and cultural venues. Arts, culture and entertainment creates a differential advantage for the district and adds to the quality of life for Oakland residents. The CBD will provide leadership and programs to enhance Lake Merritt-Uptown's image as a unique arts and cultural destination.
- Marketing and Communications:** Marketing and communications efforts will be strengthened to support all components of the CBD Management Plan. Marketing related to clean and safe services will create awareness of cleaning, hospitality, beautification and placemaking changes being made to improve the district, and promote the vision designed by the community and inspire stakeholder engagement. Marketing related to the economic development portion of the work program will: advance the image and branding of the Lake Merritt-Uptown; highlight the unique startup innovation and arts, culture and entertainment character of the district; attract new and returning visitors to live, work, eat, drink, play, engage,

and be inspired; support new investment opportunities for retail, office and housing; and promote easy and affordable access via transit and parking.

- **Collaboration:** The CBD will support research and community education efforts that help to evaluate the impacts of policies and issues on the Lake Merritt-Uptown business and investment climate. The CBD will support efforts to advance policies that improve the district's overall quality of life and economic and cultural vitality.

### **Special Projects**

The CBD will include funds to invest in highly visible improvements that will add to the attractiveness of public spaces throughout Lake Merritt-Uptown. Beautification and placemaking improvements may include:

- Landscaping, planters, hanging flower baskets and other green elements.
- Seasonal holiday decorations and banners.
- Cosmetic capital improvements, including street furniture, information kiosks, pedestrian lighting and other amenities.
- Wayfinding and directional signage to help visitors navigate through the district.
- Temporary and permanent public art installations.
- Installation of bicycle racks and other amenities to encourage bicycle use.
- Promote the installation and use of bike-share, car-share and other innovative mobility options.
- Programming and events within public spaces.
- Planning and design processes to improve public spaces throughout the district.
- Other improvements as determined year-to-year by the LMUDA board of directors.

### **Management, Administration and Reserve**

Like any business, the CBD requires a professional staff to properly manage programs, communicate with stakeholders and provide leadership. To reduce administrative costs, increase leveraging of funds and avoid duplication of enhanced services, this plan anticipates that the day-to-day services financed by the CBD will continue to be managed by the Lake Merritt-Uptown District Association (LMUDA). CBD funds can be further leveraged by sponsorships from special events, contracts, grants, parking meter revenues and earned income.

Administrative costs include:

- Accounting and annual financial review and/or audit
- Insurance
- Program support costs including supplies, equipment and rent
- Costs of assessment collection and administration from both the City (1.0%) and the County (1.7%)
- Other administration costs associated with the overhead and administrative support of programs.

A reserve is also budgeted to provide a contingency for unforeseen program needs and to provide a cushion for assessment delinquencies. Reserve funds can also be utilized to pay for costs associated with CBD renewal.

## SECTION C: BENEFITTING PARCELS

The northern and southern boundaries of the PBID extend roughly from 27<sup>th</sup> Street and Broadway, including Bay Place to the east and 24<sup>th</sup> Street to the west, one parcel east of Telegraph Avenue. The eastern and western boundaries extend roughly to the corner of 17<sup>th</sup> Street and Alice Street and halfway down 18<sup>th</sup> Street between San Pablo Avenue and Telegraph Avenue next to The Fox Theater.

The parcels selected to be included and the PBID form a unique retail, entertainment, commercial and residential core that has become a large portion of what is now recognized as Oakland's Uptown Arts and Entertainment District. Keeping this important office, arts and entertainment district clean, safe and attractive will increase pedestrian traffic and consumer activity and help create a strong symbiotic relationship between the PBID and the customers it serves.

### CBD Boundary

The boundaries of the Lake Merritt-Uptown District Association in 2019 are described as follows:

**Northern Boundary:** Starting at the corner of Grand Avenue and Bay Place, parcel number 10-768-4, running west on the north side of Bay Place to the corner of Vernon Street and Bay Place, parcel number 10-795-27-1, and continuing westward to the corner of 27<sup>th</sup> Street and Harrison Street, parcel number 8-671-20-1, then continuing west along the southern side of 27<sup>th</sup> Street to northeast corner of Broadway, parcel number 9-684-3-2, then moving south along Broadway to the southeast corner of 24<sup>th</sup> and Broadway, parcel number 8-674-3-1 and continuing further west along 24<sup>th</sup> Street until the northern LMUDA boundary meets the eastern boundary of the Koreatown Northgate CBD, parcel number , one parcel to the east the intersection of Telegraph Avenue and 24<sup>th</sup> Street, parcel number 8-674-18.

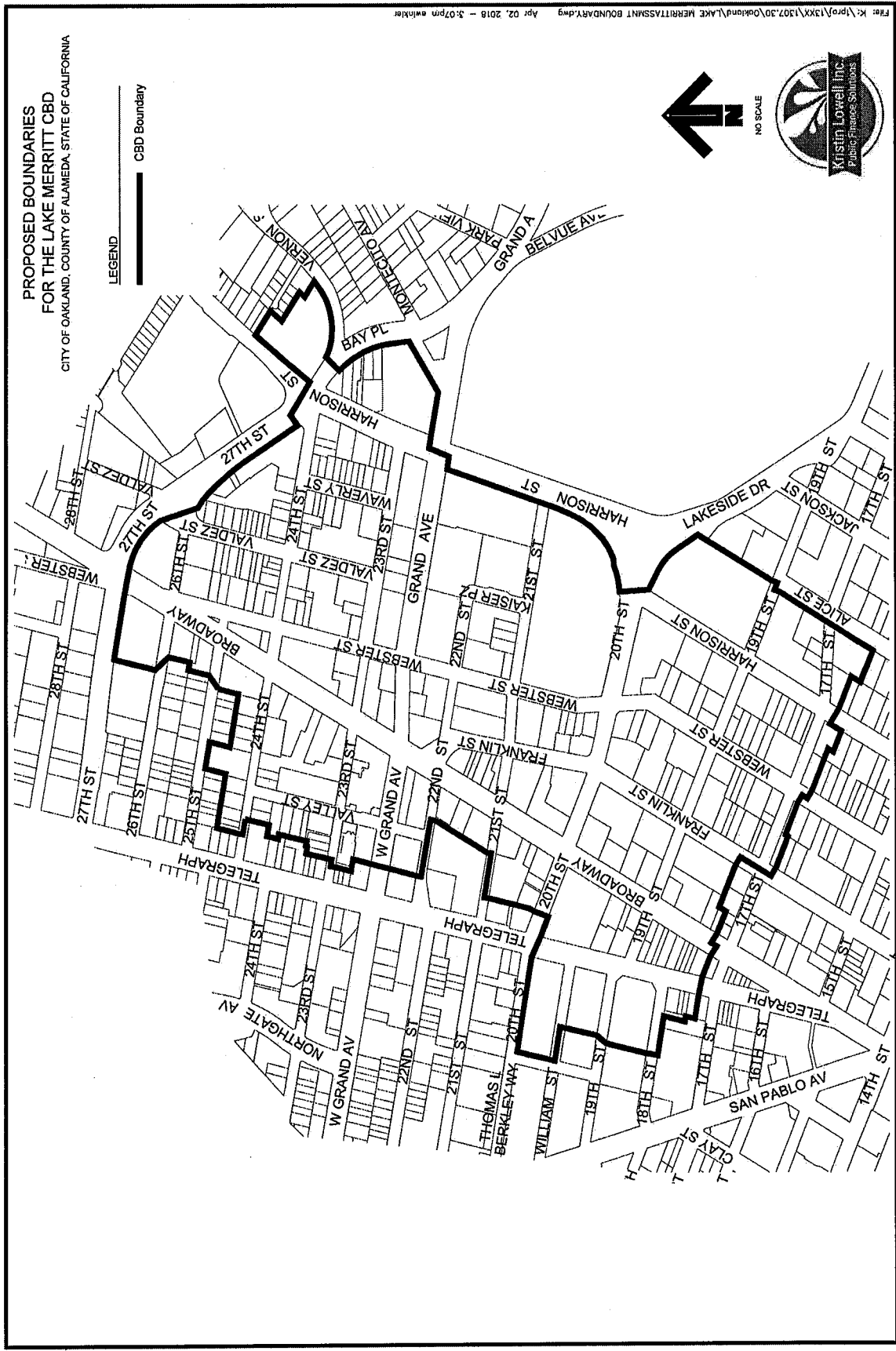
**Southern Boundary:** Starting at the southeast corner of 17<sup>th</sup> Street and Alice Street, parcel number 8-626-8, running west along 17<sup>th</sup> Street to where the boundary meets the northern boundary of the Downtown Oakland CBD at the northeast corner of 17<sup>th</sup> Street and Franklin Street, parcel number 8-624-17, one parcel north of the corner of 17<sup>th</sup> Street and Franklin Street, parcel number 8-623-6-1, just one parcel north of the southwest corner of 17<sup>th</sup> Street and Broadway, parcel number 8-623-11, to one block north of the southeast corner of 17<sup>th</sup> Street and Telegraph Avenue, parcel number 8-640-10, to one block north of the southwest corner of 17<sup>th</sup> Street and Telegraph Avenue, parcel number 8-641-4.

**Eastern Boundary:** Starting at the southwest corner of 17<sup>th</sup> Street and Alice Street, parcel number 8-626-8, running north along the west side of Alice Street, including the eastern boundary of Snow Park, and continuing north onto Lakeside Drive to the southeast corner of 20<sup>th</sup> Street and Harrison Street, parcel number 8-635-1, and continuing along the west side of Harrison Street where LMUDA's eastern boundary meets with LMUDA's northern boundary at the southeast corner of Bay Place and Grand Avenue, parcel number 10-768-4.

**Western Boundary:** Starting approximately halfway down 18<sup>th</sup> Street between San Pablo Avenue and Telegraph Avenue next to The Fox Theater, parcel number 8-642-16, running north along the west side of Telegraph Avenue to approximately halfway down 19<sup>th</sup> Street between Telegraph Avenue and San Pablo Avenue, encompassing 1911 Telegraph, parcel number 8-716-58, continuing up Williams Street to the southwest corner of Rashida Muhammad Street and Williams Street, Parcel number 8-716-56, continuing on the east side of Rashida Muhammad Street to 20<sup>th</sup>

Street (aka Thomas L. Berkeley Street) to the southwest corner of 20<sup>th</sup> Street and Telegraph Avenue, continuing north along the north side of 20<sup>th</sup> Street, parcel number 8-649-9, then continuing to the backside of the Paramount Theatre on 21<sup>st</sup> Street, parcel number 8-648-18, continuing down 22<sup>nd</sup> Street to one parcel east of Telegraph Avenue, parcel number 8-658-10, continuing north along the eastern boarder of the Koreatown Northgate CBD to 24<sup>th</sup> Street, parcel number 8-674-18.





## SECTION D: PROPORTIONAL BENEFITS

### ***Methodology***

Article XIIID Section 4(a) of the State Constitution states that "The proportionate special benefit derived by each identified parcel shall be determined in relationship to the entirety of the capital cost of the public improvement, the maintenance and operation expenses of a public improvement, or the cost of the property related service being provided."

Determining the proportionate special benefit among the parcels of real property within the proposed assessment district which benefit from the proposed improvements, services, and activities is the result of a five-step process:

1. Defining the proposed activities (Section B),
2. Determining which parcels specially benefit from the proposed activities (Section C),
3. Determining the proportional special benefit a parcel receives in relation to the amount of special benefit all other parcels in the CBD receive (Section D).
4. Determining the amount of special benefit each parcel receives (Section E),
5. Quantifying the amount of general benefit the CBD activities may provide (Section E),

Each identified parcel within the Lake Merritt CBD will be assessed based upon each parcel's unique characteristics in relationship to all other specially benefitted parcels' characteristics. Due to the proportionate special benefits received by each parcel from the CBD services, each parcel will be assessed a rate which is commensurate with the amount of special benefits received.

### ***Land Use Considerations***

All parcels within the CBD specially benefit from the CBD activities but not to the same degree. The proportional special benefit and assessment methodology provides the following land use considerations for properties used exclusively for residential condominiums, government parcels and parking structures:

**Residential Condominiums and Government Property:** Residential condominiums and government owned properties specially benefit from the CBD activities but differently than commercial parcels. They will receive special benefit from Environment Services (i.e. clean and safe), Organization and Reserves and will be assessed fully for them; however, residential condominiums and government parcels will not receive the same special benefit as commercial parcels from Economy Services (i.e. marketing, special projects and economic development) because those uses are not engaged in commercial or customer attraction activities, thus their assessment will not include that portion of the assessment. All commercial and mixed-use parcels with residential condominium uses will be subject to an adjusted assessment rate for the residential square footage of that parcel. The commercial square footage for that parcel will be assessed the assessment rate applied to all commercial parcels. Rental residential units (i.e. apartments) are considered income-producing commercial property and will be assessed at commercial rates, receiving full benefit from all CBD services.

The resulting adjustment for residential condominiums and government property is 78.74% of the full assessment rate, and includes the following assessment components:

	Share of Full Commercial Assessment
Full Share of Clean & Safe Service Benefit	67.96%
Proportional Share of Organization Budget	8.80%
Proportional Share of Reserve	1.98%
<b>Total Adjusted Share of Commercial Rate</b>	<b>78.74%</b>

That is to say that residential condominiums and government parcels will be assessed at 78.74% of the commercial rate representing the proportional share of special benefits these parcels receive from the CBD activities.

**Parking Structures:** Parking structures receive different levels of benefit from CBD improvements and services based upon their use and ownership. Parking structures will be subject to one of the following methodologies:

- a. Parking structure square footage that is integrated within and/or dedicated to a building, has the same ownership as the building, and the building has uses in addition to parking where parking is just an ancillary use, does not receive benefit from the CBD services and therefore square footage of the parking structure will not be assessed.
- b. Stand-alone parking structures that are not ancillary to a building will receive the full benefit from CBD improvements and activities and will be assessed at standard assessment rates.

### ***Proportional Benefit Units***

Each parcel's proportional special benefit from the CBD activities compared to all other specially benefitted parcels in the district is determined by analyzing three land use factors: Building Square Footage, Lot Square Footage, and Linear Street Frontage. These land use factors are an equitable way to distribute the proportional special benefit to each parcel in that building square footage is relevant to the current use of a property and is also closely correlated to the potential pedestrian traffic from each parcel and the demand for CBD activities. A parcel's lot square footage reflects the long-term value implications of the improvement district. A parcel's linear street frontage is relevant to the street level usage of a parcel and the demand for CBD activities. Each one of these land use factors serves as the basic unit of measure to proportionately allocate the cost of the special benefits to each assessed parcel in direct relationship to all other parcels in the district.

**Building square footage** is defined as the total building square footage as determined by the outside measurements of a building. The gross building square footage is taken from the County of Alameda Assessor's records. Seventy percent (70%) of the assessment budget is allocated to the sum of the building and lot square footage to account for the special benefit to each parcel's land uses, its residents, and tenants and the long term development potential.

**Lot square footage** is defined as the total amount of area within the boundaries of the parcel. The boundaries of a parcel are defined on the County Assessor parcel maps. Seventy percent (70%) of the assessment budget is allocated to the sum of the building and lot square footage to account for the special benefit to each parcel's land uses, its residents, and tenants and the long term development potential. Lot square footage is assessed at the twice the rate of building square footage to acknowledge the long term development potential of each parcel.

**Linear street frontage** is defined as the number of linear feet of each parcel that directly fronts on a street that will receive the CBD activities. Corner lots or whole block parcels may be assessed for the sum of all the parcels' street frontage. Thirty (30%) of the assessment budget is allocated to Linear street frontage to account for the special benefit received at the street level of each parcel.

Each one of these land use factors represents the benefit units allocated to each specially benefitted parcel. The total number of benefit units in the CBD are as follows:

Land Use Factor	Benefit Units
Lot Sq Ft	3,833,770
Building Sq Ft.	9,226,291
Linear Street Frontage	46,094

## **SECTION E: SPECIAL and GENERAL BENEFITS**

State Law, Proposition 218, and judicial opinions require that assessments be levied according to the estimated special benefit each assessed parcel receives from the activities and improvements. Article XIID Section 4(a) of the California Constitution in part states that "only special benefits are assessable," which requires that we separate the general benefits, if any, from the special benefits provided by the proposed activities and improvements.

As of January 1, 2015, the State Legislature amended the State Law to clarify and define both special benefit and general benefit as they relate to the improvements and activities these districts provide. Specifically, the amendment (Section 36615.5 of the Streets and Highways Code) defines special benefit as follows: "'Special benefit' means, for purposes of a property-based district, a particular and distinct benefit over and above general benefits conferred on real property located in a district or to the public at large. Special benefit includes incidental or collateral effects that arise from the improvements, maintenance, or activities of property-based districts even if those incidental or collateral effects benefit property or persons not assessed."

In addition, the amendment (Section 36609.5 of the Streets and Highways Code) defines general benefit as follows: "'General benefit' means, for purposes of a property-based district, any benefit that is not a 'special benefit' as defined in Section 36615.5."

Furthermore, the amendment (Section 36601(h)(2)) states: "Activities undertaken for the purpose of conferring special benefits upon property to be assessed inherently produce incidental or collateral effects that benefit property or persons not assessed. Therefore, for special benefits to exist as a separate and distinct category from general benefits, the incidental or collateral effects of those special benefits are inherently part of those special benefits. The mere fact that special benefits produce incidental or collateral effects that benefit property or persons not assessed does not convert any portion of those special benefits or their incidental or collateral effects into general benefits."

### ***Special Benefit Analysis***

All special benefits derived from the assessments outlined in this report are for property related activities directly benefiting each individual assessed parcel in the CBD. The special benefit must affect the individual assessable parcel in a way that is particular and distinct from its effect on other parcels, and that real property in general and the public at large do not share. No parcel's assessment shall be greater than the special benefits received.

Streets and Highways Code Section 36601(e) states that "Property and business improvement districts formed throughout this state have conferred special benefits upon properties and businesses within their districts, and have made those properties and businesses more useful by providing the following benefits: (1) Crime reduction. A study by the Rand Corporation has confirmed a 12-percent reduction in the incidence of robbery and an 8-percent reduction in the total incidence of violent crimes within the 30 districts studied. (2) Job creation. (3) Business attraction. (4) Business retention. (5) Economic growth. (6) New investments."

The CBD's goal is to fund activities and improvements that provide a cleaner, safer, and more attractive and economically vibrant environment as outlined in Section B. The goal of improving

the economic vitality is achieved by improving the safety, cleanliness, and economic vitality of each specially benefitted parcel in an effort to increase commerce, to increase building occupancy and lease rates, and to attract more customers, employees, tenants, investors and residents.

Specifically, each parcel specially benefits from each of the CBD activities as defined below.

### **Cleaning and Hospitality Ambassadors**

The enhanced cleaning and ambassafor activities make the area more attractive for businesses, customers, residents, and ultimately private investment. When business location decisions are made, "lower levels of public safety lead to increased uncertainty in decision making and can be perceived as a signal of a socio-institutional environment unfavorable for investment. Uncertainty affects the investment environment in general. But in particular, it increases the fear of physical damage to investment assets (or to people) or their returns... Almost universally, places with lower crime rates are perceived as more desirable".<sup>9</sup> Once economic investment occurs within the district, pedestrian traffic and commercial activity will increase.

All parcels will specially benefit from these activities, such as:

- Increased security patrol to provide a higher level of safety to property, residents, customers, employees and visitors as they pass through the district;
- Connecting the homeless to available resources so they are not loitering on private property, vandalizing storefronts or engaging in nuisance activities;
- Removing graffiti from buildings to keep the aesthetic appeal uniform throughout the district;
- Maintaining sidewalks in front of each parcel creates a cohesive environment and allows pedestrians to move freely throughout the district. "Walkable communities offer many financial benefits, such as a reduction in healthcare costs. Homes with sidewalks tend to sell for more money and in less time than similar homes without sidewalks. Businesses also benefit as residents are more likely to shop locally when there is increased connectivity between residential and business/commercial districts. The well-maintained sidewalks, accessibility, and inviting atmosphere of downtown helps to attract tourists."<sup>10</sup>

### **Marketing and Economic Development**

These activities are tied to and will specially benefit each assessed parcel by encouraging business development and investment that generates customer traffic, which directly relates to increases in commercial activity, filling of vacant storefronts, offices and residential units and ultimately, increased lease rates for retail and office space. This is a benefit to the District because it works to improve the positive perception of the District. Decisions on where to shop, eat or attend events are largely based on a perception of the place. If these activities were not communicated it would be a deterrent to pedestrian traffic, business and commerce.

All parcels regardless of their land use (excluding government owend parcels) will specially benefit from Marketing and Economic activities, such as:

- Increased business development efforts that will attract new tenants and investment and promote mixed-use development that includes retail, office, housing and cultural uses;

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<sup>9</sup> "Accelerating economic growth and vitality through smarter public safety management" IBM Global Business Services Executive Report, September 2012, pg. 2

<sup>10</sup> "Benefits of Sidewalks", Iowa Healthiest State Initiative, November 1, 2017

- Promoting the unique arts and cultural environment that adds quality of life to residents and tenants;
- Increased communication and marketing to highlight the economic development potential and unique characteristics of Lake Merritt-Uptown to attract new and recurring visitors to live, eat, play and work within the district;
- Funding for special projects that will enhance the aesthetic environment and placemaking to create a sense of community.

Residential condominiums and government parcels as discussed in Section D above will not specially benefit from increased commercial activity associated with the marketing and economic development activities as well as the special projects. Therefore, these parcels will not be assessed for these services.

**Special Benefit Conclusion**

Based on the special benefits each assessed parcel receives from the CBD activities, we concluded that each of the proposed activities provides special benefits to the real property within the district, and that each parcel's assessment is in direct relationship to and no greater than the special benefits received.

## **General Benefit Analysis**

As required by the State Constitution Article XIID Section 4(a), the general benefits of an assessment district must be quantified and separated out so that the cost of the activities that are attributed to general benefit are deducted from the cost assessed against each specially benefitted parcel. General benefits are benefits from the CBD activities and improvements that are not special in nature, are not "particular and distinct", and are not over and above the benefits that other parcels receive. This analysis will evaluate and determine the level of general benefits that (1) parcels outside of the CBD, and (2) the public at large, may receive.

### **General Benefit to Parcels Outside of the CBD**

All the CBD activities and improvements are provided solely to each of the individual assessed parcels in the CBD boundary. Each of the CBD activities is provided to the public right-of-ways (streets, alleys, sidewalks) adjacent to all specially benefitted parcels or tenants in the CBD. None of the surrounding parcels will directly receive any of the CBD activities. Any benefits these parcels may receive are incidental to providing special benefits to the assessed parcels, and thus any cost associated to the incidental benefits are not reduced from the cost of providing special benefit.

### **General Benefit to the Public At Large**

In addition to general benefit analysis to the parcels outside of the Lake Merritt CBD boundary, there may be general benefits to the public at large, i.e., those people that are either in the CBD boundary and not specially benefitted from the activities, or people outside of the CBD boundary that may benefit from the CBD activities. In the case of the Lake Merritt CBD, the public at large are those people that are within the CBD boundary that do not pay an assessment and do not specially benefit from the CBD activities.

To calculate the general benefit the public at large may receive we determine the percentage of each CBD activity budget that may benefit the general public. In this case, the Marketing and Special Projects are tailored to benefit and promote each assessed parcel and are not intended to benefit the general public. Operations and Reserve activities are to provide daily CBD management solely for the benefit of the assessed parcels, and are not intended to benefit the general public. If there are any public benefits, they are incidental and collateral to providing special benefits to the assessed parcels.

By contrast, the Cleaning and Hospitality Ambassadors activities may benefit the general public to some degree, as the general public may appreciate the enhanced level of maintenance and security as it passes through the district. To quantify this, we first determine a general benefit factor for the Cleaning and Hospitality Ambassadors activities. The general benefit factor is a unit of measure that compares the special benefit that the assessed parcels receive compared to the general benefit that the general public receives. To determine the general benefit factor, we used previous districts that conducted intercept surveys in San Francisco (Union Square and West Portal) and Los Angeles (Historic Downtown, Leimert Park, Arts District, Downtown Industrial, Fashion District, and Sherman Oaks). The intent of the surveys was to determine what percentage of the general public was just passing through the district without any intent to engage in commercial activity. The surveys concluded that on average 1.4% of the respondents were within the district boundary with no intent to engage in any business activity. Here, since the CBD is designed to promote a business and residential climate that encourages development, investment, and commerce, it follows that the benefits received by these pedestrians do not translate to a special benefit to the assessed parcels. In other words, based on the results of



these surveys it is reasonable to conclude that 1.4% of Cleaning and Hospitality Ambassadors activities provide general benefits. However, to be conservative and to account for any variance in district type, size and services provided, we applied a 5% general public benefit factor to account for these variances. The general benefit factor is then multiplied by the Cleaning and Hospitality Ambassadors percentage of the budget to determine the overall general benefit for the Cleaning and Hospitality Ambassadors activities. The following table illustrates this calculation.

<b>ACTIVITY</b>	<b>A Budget Amount</b>	<b>B % of Budget</b>	<b>C General Benefit Factor</b>	<b>D General Benefit Percent (B x C)</b>	<b>E General Benefit Allocation (A x D)</b>
Clean/Ambassadors	\$1,050,000	67.96%	5.00%	3.40%	\$35,680

This analysis indicates that \$35,680 of the Clean and Hospitality Ambassdor activities may be attributed to general benefit to the public at large, and must be raised from sources other than special assessments.

**General Benefit Conclusion**

Using the sum of the two measures of general benefit described above we find that \$35,680 or 2.31% of the total \$1,545,000 CBD budget may be general in nature and will be funded from sources other than special assessments.

## SECTION F: COST ESTIMATE

### 2019 CBD Budget

The Lake Merritt CBD's operating budget takes into consideration:

1. The improvements and activities needed to provide special benefits to each individual parcel within the Lake Merritt CBD boundary (Section B),
2. The parcels that specially benefit from said improvements and activities (Section C), and
3. The costs associated with the special and general benefits conferred (Section E).

<b>EXPENDITURES</b>	<b>BUDGET</b>	<b>% of Budget</b>
Clean & Safe	\$1,050,000	67.96%
Communications & Marketing	\$179,143	11.60%
Organization	\$179,142	11.59%
Special Projects Fund	\$50,000	3.24%
City/County Fees (2.7%)	\$41,715	2.70%
Reserve	\$45,000	2.91%
<b>Total Expenditures</b>	<b>\$1,545,000</b>	<b>100.00%</b>
<b>REVENUES</b>		
Assessment Revenues	\$1,509,320	97.69%
Other Revenues (1)	\$35,680	2.31%
<b>Total Assessment District Revenues</b>	<b>\$1,545,000</b>	<b>100.00%</b>

(1) Other non-assessment funding to cover the cost associated with general benefit.

### Budget Adjustments

- Assessments will be subject to an annual increase or decrease of up to 5% per year as determined by the Advisory Board. Assessment increases/decreased must stay between 0% and 5% in any given year. The determination of annual adjustments in assessment rates will be subject to the review and approval of the board of the LMUDA board of directors.
- Revenues for specific activities within the general activity categories (i.e. Clean and Safe and Marketing and Economic enhancements) may be reallocated among specific activities from year to year based upon district needs and budgets developed by the LMUDA board of directors. Up to 10% of revenues may be moved between the Clean and Safe and Marketing and Economic Enhancement categories.
- Any surplus monies from the 2008 CBD, as of December 31, 2018, to be carried over to the 2018 CBD can only be used to benefit those properties within the 2008 CBD. If this is not practical, such surplus monies will be refunded to property owners in the 2008 CBD in proportion to how they were assessed in the 2008 CBD.

### Bond Issuance

The District will not issue bonds.

To calculate the annual assessment for a government parcel with a 10,000 square foot lot, 30,000 square foot building plus 50 linear feet, the calculation is as follows:

Lot square feet (10,000) x \$0.0615 = .....	\$615.00
Building square feet (30,000) x \$0.0615 = .....	\$1,845.00
Linear frontage (50) x \$7.464 = .....	\$373.20
Total Annual Parcel Assessment = .....	\$2,833.20

To calculate the annual assessment for a residential condo with 1,500 building square feet, the calculation is as follows:

Building square feet (1,500) x \$0.213 = .....	\$319.50
Total Annual Parcel Assessment = .....	\$319.50

The assessment calculation is the same for every parcel in the CBD respective of its land use type.

### ***Budget Adjustment***

Any annual budget surplus will be rolled into the following year's District budget. The budget will be set accordingly, within the constraints of the management plan to adjust for surpluses that are carried forward. District funds may be used to fund the cost of renewing the District. Funds from an expired District shall be rolled over into the new District if one is established, or returned to the property owners if one is not established, in accordance with the Streets and Highways Code section 36671.

If an error is discovered on a parcel's assessed footages, the District may investigate and correct the assessed footages after confirming the correction with the Alameda County Assessor Data and City Clerk's office. The correction will be made in accordance with the assessment methodology and may result in an increase or decrease to the parcel's assessment.

The cost of providing programs and services may vary depending on the market cost for those programs and services. Expenditures may require adjustment up or down to continue the intended level of programs and services. The Advisory Board shall have the right to reallocate up to 10% by line item of the budget allocation within the budgeted categories. Any change will be approved by the Advisory Board board of directors and submitted to the City of Oakland within its annual planning report, pursuant to Section 36650 of the California Streets and Highways Code. The overall budget shall remain consistent with this Management District Plan. Each assessed parcel pays for 100% of the special benefit received based on the level of benefit received.

### ***Future Development***

As a result of continued development, the District may experience the addition or subtraction of assessable footage for parcels included and assessed within the District boundaries. The modification of parcel improvements assessed within the District may then change upwards or downwards the amount of total footage assessment for these parcels, pursuant to Government Code 53750, will be prorated to the date they receive the temporary and/or permanent certificate of occupancy. Parcels that experience a loss of building square footage need to notice the District of changes.

In future years, the assessments for the special benefits bestowed upon the included CBD parcels may change in accordance with the assessment methodology formula listed in the Management District Plan and Engineer's Report provided the assessment rate does not change. If the assessment formula changes and increases assessments then a Proposition 218 ballot will be required for approval of the formula changes.

## **SECTION H: ASSESSMENT ROLL**

The total assessment amount for FY 2018/2019 is \$1,509,320 apportioned to each individual assessed parcel, as follows.

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LAKE MERRITT CBD 2018									
ASSESSMENT ROLL									
FY 2018/2019									
			Assessable Footages			2018/19 Assessments			
APN	SITE ADDRESS	CODE	Bldg SF	Lot Sz	Frontage	Bldg \$	Lot \$	Linear \$	Total \$
008 062300100	1770 Broadway	Comm	35548	8400	184	\$2,775.05	\$655.75	\$1,744.20	\$5,175.00
008 062300601	1731 Franklin St	Govt	194400	45000	450	\$11,949.18	\$2,766.01	\$3,358.74	\$18,073.93
008 062301100	1716 Broadway	Comm	4000	4000	40	\$312.26	\$312.26	\$379.17	\$1,003.69
008 062301200	1724 Broadway	Comm	26400	9000	60	\$2,060.92	\$702.59	\$568.76	\$3,332.26
008 062301300	1740 Broadway	Comm	29363	27600	100	\$2,292.22	\$2,154.59	\$947.94	\$5,394.75
008 062400101	1814 Franklin St	Comm	114924	23880	320	\$8,971.54	\$1,864.19	\$3,033.39	\$13,869.13
008 062400300	361 19Th St	Comm	11600	11692	217	\$905.55	\$912.74	\$2,057.02	\$3,875.31
008 062400400	Webster St	Parking	0	4875	32	\$0.00	\$380.57	\$303.34	\$683.91
008 062400500	Webster St	Parking	0	4800	32	\$0.00	\$374.71	\$303.34	\$678.05
008 062400600	1739 Webster St	Parking	0	7500	50	\$0.00	\$585.49	\$473.97	\$1,059.46
008 062400700	1717 Webster St	Parking	0	15000	100	\$0.00	\$1,170.98	\$947.94	\$2,118.91
008 062400800	1709 Webster St	Comm	0	7511	138	\$0.00	\$586.35	\$1,308.15	\$1,894.50
008 062400900	378 17Th St	Comm	4560	2731	40	\$355.98	\$213.20	\$379.17	\$948.35
008 062401000	394 17Th St	Comm	15070	6919	196	\$1,176.44	\$540.13	\$1,857.95	\$3,574.53
008 062401100	1710 Franklin St	Comm	8526	3450	23	\$665.58	\$269.32	\$218.03	\$1,152.93
008 062401201	1720 Franklin St	Comm	24435	12750	85	\$1,907.52	\$995.33	\$805.75	\$3,708.59
008 062401400	1724 Franklin St	Comm	18786	6750	45	\$1,466.53	\$526.94	\$426.57	\$2,420.04
008 062401500	1734 Franklin St	Comm	0	4500	30	\$0.00	\$351.29	\$284.38	\$635.67
008 062401600	1736 Franklin St	Comm	29040	7500	50	\$2,267.01	\$585.49	\$473.97	\$3,326.46
008 062401700	385 17Th St	Comm	11026	5614	187	\$860.74	\$438.26	\$1,772.64	\$3,071.64
008 062401800	359 17Th St	Comm	6510	3255	172	\$508.20	\$254.10	\$1,630.45	\$2,392.75
008 062500101	1830 Webster St	Comm	9702	4900	149	\$757.39	\$382.52	\$1,412.42	\$2,552.33
008 062500102	331 19Th St	Comm	4650	2450	50	\$363.00	\$191.26	\$473.97	\$1,028.23
008 062500201	301 19Th St	Comm	0	22950	303	\$0.00	\$1,791.59	\$2,872.25	\$4,663.84
008 062500400	Harrison St	Parking	0	7500	50	\$0.00	\$585.49	\$473.97	\$1,059.46
008 062500500	1811 Harrison St	Parking	0	6000	40	\$0.00	\$468.39	\$379.17	\$847.56
008 062500600	1805 Harrison St	Govt	14200	7525	50	\$872.83	\$462.54	\$373.19	\$1,708.56
008 062500700	1801 Harrison St	Govt	6254	5719	38	\$384.41	\$351.53	\$283.63	\$1,019.57
008 062500800	1711 Harrison St	Govt	0	7257	48	\$0.00	\$446.07	\$358.27	\$804.33
008 062500900	300 17Th St	Comm	2988	2988	170	\$233.26	\$233.26	\$1,611.49	\$2,078.01
008 062501401	330 17Th St	Comm	34397	24438	373	\$2,685.20	\$1,907.75	\$3,535.80	\$8,128.76
008 062501500	1734 Webster St	Apt	18108	6750	45	\$1,413.60	\$526.94	\$426.57	\$2,367.11
008 062501600	1750 Webster St	Comm	0	7500	50	\$0.00	\$585.49	\$473.97	\$1,059.46
008 062501700	Webster St	Comm	0	7500	50	\$0.00	\$585.49	\$473.97	\$1,059.46
008 062501800	1810 Webster St	Parking	0	4515	43	\$0.00	\$352.46	\$407.61	\$760.08
008 062501900	333 17Th St	Comm	10320	10212	218	\$805.63	\$797.20	\$2,066.50	\$3,669.33
008 062502201	1633 Harrison St	Govt	59903	13400	150	\$3,682.06	\$823.66	\$1,119.58	\$5,625.29
008 062600101	1800 Harrison St #6Th	Comm	621783	70984	837	\$48,539.49	\$5,541.37	\$7,934.22	\$62,015.08
008 062600400	1817 Alice St	Comm	4982	5022	50	\$388.92	\$392.04	\$473.97	\$1,254.93
008 062600500	Alice St	Comm	0	5450	36	\$0.00	\$425.45	\$341.26	\$766.71
008 062600601	250 17Th St	Comm	0	4966	135	\$0.00	\$387.67	\$1,279.71	\$1,667.38
008 062600602	266 17Th St	Comm	8478	4537	59	\$661.84	\$354.18	\$559.28	\$1,575.30
008 062600700	278 17Th St	Comm	5762	5218	54	\$449.81	\$407.34	\$511.89	\$1,369.04
008 062600800	1553 Alice St	Apt	69300	29000	161	\$5,409.90	\$2,263.89	\$1,526.18	\$9,199.97
008 062603400	285 17Th St	Comm	23028	12200	213	\$1,797.68	\$952.39	\$2,019.10	\$4,769.18
008 063500100	274 19Th St	Govt	0	178160	1265	\$0.00	\$10,950.95	\$9,441.80	\$20,392.75
008 063601001	1939 Harrison St	Comm	93900	24000	160	\$7,330.30	\$1,873.56	\$1,516.70	\$10,720.56
008 063601101	1901 Harrison St	Comm	272100	22500	300	\$21,241.49	\$1,756.46	\$2,843.81	\$25,841.76
008 063601301	334 19Th St	Comm	8790	5070	90	\$686.19	\$395.79	\$853.14	\$1,935.12
008 063601500	1900 Webster St	Comm	5968	6000	160	\$465.89	\$468.39	\$1,516.70	\$2,450.98
008 063601600	1922 Webster St	Comm	7500	7500	50	\$585.49	\$585.49	\$473.97	\$1,644.94
008 063601801	1940 Webster St	Comm	21718	16567	110	\$1,695.42	\$1,293.30	\$1,042.73	\$4,031.45
008 063601900	Webster St	Comm	0	8680	60	\$0.00	\$693.22	\$568.76	\$1,261.98
008 063602005	1956 Webster St	Comm	42340	12988	241	\$3,305.27	\$1,013.91	\$2,284.53	\$6,603.71
008 063602008	1999 Harrison St	Comm	489259	62726	361	\$38,194.01	\$4,896.71	\$3,422.05	\$46,512.76
008 063700303	1975 Webster St	Comm	0	11045	210	\$0.00	\$862.23	\$1,990.67	\$2,852.89
008 063700403	1957 Webster St	Parking	0	7085	55	\$0.00	\$553.09	\$521.36	\$1,074.46
008 063700500	1951 Webster St	Comm	13468	9000	85	\$1,051.38	\$702.59	\$805.75	\$2,559.71
008 063700806	1950 Franklin St	Comm	446998	34986	221	\$34,894.90	\$2,731.18	\$2,094.94	\$39,721.02
008 063700808	1919 Webster St	Govt	0	27000	333	\$0.00	\$1,659.61	\$2,485.47	\$4,145.08
008 063701301	1904 Franklin St	Comm	49696	10850	225	\$3,879.52	\$847.01	\$2,132.86	\$6,859.38
008 063701401	1916 Franklin St	Comm	3156	7650	50	\$246.37	\$597.20	\$473.97	\$1,317.54
008 063701500	1924 Franklin St	Comm	19480	6000	40	\$1,520.71	\$468.39	\$379.17	\$2,368.27

APN	SITE ADDRESS	CODE	Assessable Footages			2018/19 Assessments			
			Bldg SF	Lot Sz	Frontage	Bldg \$	Lot \$	Linear \$	Total \$
008 063702001	1970 Franklin St	Comm	6105	24570	280	\$476.59	\$1,918.06	\$2,654.22	\$5,048.86
008 063800100	1970 Broadway	Comm	155952	27900	336	\$12,174.39	\$2,178.01	\$3,185.06	\$17,537.47
008 063800500	1900 Broadway	Comm	36020	13950	243	\$2,811.90	\$1,089.01	\$2,303.48	\$6,204.39
008 063800603	1901 Franklin St	Parking	0	13950	93	\$0.00	\$1,089.01	\$881.58	\$1,970.59
008 063800604	1901 Franklin St	Parking	0	2813	336	\$0.00	\$219.60	\$3,185.06	\$3,404.66
008 063800710	1930 Broadway	Comm	11400	12750	125	\$889.94	\$995.33	\$1,184.92	\$3,070.19
008 063800711	415 20Th St	Govt	71506	44867	409	\$4,395.26	\$2,757.84	\$3,052.72	\$10,205.82
008 063900100	1955 Broadway	Comm	381622	76665	857	\$29,791.32	\$5,984.85	\$8,123.81	\$43,899.99
008 063900201	1933 Broadway	Comm	23849	12365	93	\$1,861.77	\$965.27	\$881.58	\$3,708.63
008 063900300	1915 Broadway	Comm	4800	3450	30	\$374.71	\$269.32	\$284.38	\$928.42
008 063900400	464 19Th St	Comm	10650	5760	153	\$831.39	\$449.65	\$1,450.34	\$2,731.39
008 063900500	1916 Telegraph Ave	Comm	10810	11990	216	\$843.88	\$936.00	\$2,047.54	\$3,827.42
008 063900602	1932 Telegraph Ave	Comm	9952	10732	93	\$776.90	\$837.79	\$881.58	\$2,496.28
008 064000100	1816 Telegraph Ave	Comm	6810	3557	136	\$531.62	\$277.68	\$1,289.19	\$2,098.49
008 064000200	1775 Broadway	Comm	7188	3594	132	\$561.13	\$280.57	\$1,251.28	\$2,092.97
008 064000300	1763 Broadway	Comm	6726	6739	75	\$525.07	\$526.08	\$710.95	\$1,762.10
008 064000400	1759 Broadway	Comm	5593	4281	51	\$436.62	\$334.20	\$483.45	\$1,254.26
008 064000600	1741 Broadway	Comm	16730	7556	102	\$1,306.03	\$589.86	\$966.89	\$2,862.78
008 064000700	1733 Broadway	Comm	7500	3443	51	\$585.49	\$268.78	\$483.45	\$1,337.71
008 064000800	1727 Broadway	Govt	0	3443	51	\$0.00	\$211.63	\$380.66	\$592.29
008 064000900	1725 Broadway	Comm	5222	3100	51	\$407.66	\$242.00	\$483.45	\$1,133.10
008 064001000	1715 Broadway	Comm	26560	8311	152	\$2,073.41	\$648.80	\$1,440.86	\$4,163.07
008 064100100	1741 Telegraph Ave	Comm	19120	6800	168	\$1,492.60	\$530.84	\$1,592.53	\$3,615.98
008 064100200	1727 Telegraph Ave	Comm	7500	2500	25	\$585.49	\$195.16	\$236.98	\$1,017.63
008 064100300	1723 Telegraph Ave	Comm	2500	2500	25	\$195.16	\$195.16	\$236.98	\$627.31
008 064100400	1715 Telegraph Ave	Comm	5150	5150	50	\$402.03	\$402.03	\$473.97	\$1,278.04
008 064201600	1807 Telegraph Ave	Comm	128980	64697	784	\$10,068.82	\$5,050.57	\$7,431.82	\$22,551.21
008 064800100	2147 Broadway	Comm	24694	12351	243	\$1,927.74	\$964.18	\$2,303.48	\$5,195.40
008 064801700	2127 Broadway	Comm	14231	12564	80	\$1,110.94	\$980.81	\$758.35	\$2,850.10
008 064801800	2101 Broadway	Comm	16381	18768	260	\$1,278.78	\$1,465.12	\$2,464.63	\$5,208.54
008 064900500	2025 Broadway	Govt	70350	39061	196	\$4,324.20	\$2,400.96	\$1,462.92	\$8,188.08
008 064900600	2021 Broadway	Comm	8000	4000	40	\$624.52	\$312.26	\$379.17	\$1,315.95
008 06490070	2015 Broadway	Comm	50032	11300	213	\$3,905.75	\$882.13	\$2,019.10	\$6,806.99
008 064900800	466 Thomas L Berkley Wa	Comm	9000	4500	45	\$702.59	\$351.29	\$426.57	\$1,480.45
008 064900900	490 Thomas L Berkley Wa	Govt	0	9370	86	\$0.00	\$575.95	\$641.89	\$1,217.84
008 064901100	2029 Broadway	Govt	0	12643	254	\$0.00	\$777.13	\$1,895.82	\$2,672.95
008 065000100	2148 Broadway	Comm	36000	9526	277	\$2,810.34	\$743.65	\$2,625.78	\$6,179.77
008 065000200	2128 Broadway	Comm	2562	2640	45	\$200.00	\$206.09	\$426.57	\$832.67
008 065000300	2124 Broadway	Comm	3479	3479	57	\$271.59	\$271.59	\$540.32	\$1,083.50
008 065000400	2120 Broadway	Comm	15164	6823	102	\$1,183.78	\$532.64	\$966.89	\$2,683.31
008 065000701	2104 Broadway	Comm	5569	6972	236	\$434.74	\$544.27	\$2,237.13	\$3,216.14
008 065000801	2112 Broadway	Comm	0	5780	76	\$0.00	\$451.22	\$720.43	\$1,171.65
008 065001604	2001 Franklin St	Comm	16844	28950	391	\$1,314.93	\$2,259.98	\$3,706.43	\$7,281.34
008 065002300	2044 Broadway	Comm	0	30199	481	\$0.00	\$2,357.49	\$4,559.57	\$6,917.06
008 065002400	2000 Broadway	Comm	86875	28997	270	\$6,781.90	\$2,263.65	\$2,559.43	\$11,604.97
008 065100801	2030 Franklin St	Comm	39312	15928	183	\$3,068.89	\$1,243.42	\$1,734.72	\$6,047.03
008 065101000	2021 Webster St	Comm	0	3500	35	\$0.00	\$273.23	\$331.78	\$605.01
008 065101101	2017 Webster St	Parking	0	3700	37	\$0.00	\$288.84	\$350.74	\$639.58
008 065101201	2011 Webster St	Parking	0	4500	43	\$0.00	\$351.29	\$407.61	\$758.90
008 065101403	350 Thomas L Berkley Wa	Comm	12108	7412	188	\$945.21	\$578.62	\$1,782.12	\$3,305.95
008 065101502	2000 Franklin St	Comm	33241	7700	190	\$2,594.96	\$601.10	\$1,801.08	\$4,997.14
008 065101703	2010 Franklin St	Comm	0	6075	79	\$0.00	\$474.24	\$748.87	\$1,223.11
008 065101801	2044 Franklin St	Comm	21220	27000	465	\$1,656.54	\$2,107.76	\$4,407.90	\$8,172.20
008 065200105	300 Lakeside Dr	Comm	1052839	313632	2204	\$82,189.88	\$24,483.68	\$20,892.50	\$127,566.07
008 065300800	326 21St St	Comm	0	5240	40	\$0.00	\$409.06	\$379.17	\$788.23
008 065300900	332 21St St	Comm	0	5240	40	\$0.00	\$409.06	\$379.17	\$788.23
008 065301000	338 21St St	Comm	0	6550	50	\$0.00	\$511.33	\$473.97	\$985.29
008 065301100	2100 Webster St	Comm	0	5280	158	\$0.00	\$412.18	\$1,497.74	\$1,909.92
008 065301401	2150 Webster St	Comm	0	25505	497	\$0.00	\$1,991.05	\$4,711.24	\$6,702.29
008 065301501	323 22Nd St	Comm	0	27612	466	\$0.00	\$2,155.53	\$4,417.38	\$6,572.91
008 065301903	1 Kaiser Plz	Comm	530887	57063	465	\$41,443.70	\$4,454.62	\$4,407.90	\$50,306.22
008 065302102	111 Grand Ave	Govt	0	54450	746	\$0.00	\$3,346.88	\$5,568.05	\$8,914.93
008 065302300	155 Grand Ave	Comm	200995	68984	279	\$15,690.68	\$5,385.24	\$2,644.74	\$23,720.65
008 065302400	2121 Harrison St	Non Profit	332998	110341	906	\$25,995.49	\$8,613.77	\$8,588.30	\$43,197.56
008 065500305	180 Grand Ave	Comm	270750	37817	730	\$21,136.10	\$2,952.18	\$6,919.93	\$31,008.22
008 065500400	152 Grand Ave	Comm	16544	17500	280	\$1,291.51	\$1,366.14	\$2,654.22	\$5,311.87
008 065500500	146 Grand Ave	Apt	16485	7500	120	\$1,286.90	\$585.49	\$1,137.52	\$3,009.91
008 065500600	Grand Ave	Govt	0	10000	160	\$0.00	\$614.67	\$1,194.22	\$1,808.89

APN	SITE ADDRESS	CODE	Assessable Footages			2018/19 Assessments			
			Bldg SF	Lot Sz	Frontage	Bldg \$	Lot \$	Linear \$	Total \$
008 065501000	124 Grand Ave	Apt	311702	30000	605	\$24,333.02	\$2,341.95	\$5,735.01	\$32,409.98
008 065600100	2250 Broadway	Comm	41468	12926	271	\$3,237.20	\$1,009.07	\$2,568.91	\$6,815.17
008 065600201	2270 Broadway	Comm	0	20146	397	\$0.00	\$1,572.70	\$3,763.31	\$5,336.00
008 065600400	60 Grand Ave	Comm	0	9256	186	\$0.00	\$722.57	\$1,763.16	\$2,485.73
008 065600500	55 Grand Ave	Comm	6734	6880	174	\$525.69	\$537.09	\$1,649.41	\$2,712.19
008 065600801	2228 Broadway	Comm	18675	19000	373	\$1,457.86	\$1,483.24	\$3,535.80	\$6,476.90
008 065601000	37 Grand Ave	Comm	7155	7520	91	\$558.56	\$587.05	\$862.62	\$2,008.23
008 065701100	415 W Grand Ave	Comm	4814	11142	335	\$375.80	\$869.80	\$3,175.58	\$4,421.19
008 065701200	2201 Broadway	Comm	191219	21706	408	\$14,927.51	\$1,694.48	\$3,867.58	\$20,489.57
008 065800201	23Rd St	Comm	0	4785	55	\$0.00	\$373.54	\$521.36	\$894.91
008 065800202	489 23Rd St	Comm	0	1620	20	\$0.00	\$126.47	\$189.59	\$316.05
008 065800501	460 W Grand Ave	Comm	2262	15500	260	\$176.58	\$1,210.01	\$2,464.63	\$3,851.22
008 065801000	2201 Valley St	Comm	0	21946	445	\$0.00	\$1,713.21	\$4,218.31	\$5,931.53
008 065801100	23Rd St	Comm	0	10789	61	\$0.00	\$842.24	\$578.24	\$1,420.48
008 065801200	23Rd St	Comm	0	3331	128	\$0.00	\$260.03	\$1,213.36	\$1,473.39
008 065801300	23Rd St	Comm	0	1090	69	\$0.00	\$85.09	\$654.08	\$739.17
008 066500200	24Th St	Comm	0	5150	50	\$0.00	\$402.03	\$473.97	\$876.00
008 066500300	471 24Th St	Apt	7734	14400	153	\$603.75	\$1,124.14	\$1,450.34	\$3,178.23
008 066500400	2341 Valley St	Apt	21140	9000	60	\$1,650.29	\$702.59	\$568.76	\$2,921.64
008 066500500	Valley St	Comm	0	7085	55	\$0.00	\$553.09	\$521.36	\$1,074.46
008 066500600	2333 Valley St	Comm	4038	7085	55	\$315.23	\$553.09	\$521.36	\$1,389.68
008 066500700	2325 Valley St	Res	1616	0	0	\$343.55	\$0.00	\$0.00	\$343.55
008 066500800	456 23Rd St	Comm	10241	10254	210	\$799.46	\$800.48	\$1,990.67	\$3,590.61
008 066500900	466 23Rd St	Comm	3096	3630	30	\$241.69	\$283.38	\$284.38	\$809.45
008 066501000	474 23Rd St	Comm	0	4090	33	\$0.00	\$319.29	\$312.82	\$632.10
008 066501100	480 23Rd St	Comm	4076	2758	32	\$318.19	\$215.30	\$303.34	\$836.84
008 066700503	Webster St	Comm	0	11745	221	\$0.00	\$916.87	\$2,094.94	\$3,011.81
008 066700900	2330 Broadway	Comm	0	15101	251	\$0.00	\$1,178.86	\$2,379.32	\$3,558.18
008 066701000	2325 Webster St	Parking	0	15101	251	\$0.00	\$1,178.86	\$2,379.32	\$3,558.18
008 066701100	Webster St	Comm	0	15101	251	\$0.00	\$1,178.86	\$2,379.32	\$3,558.18
008 066701300	2300 Broadway	Comm	582	460	9	\$45.43	\$35.91	\$85.31	\$166.66
008 066701400	2300 Broadway	Res	615	0	0	\$130.74	\$0.00	\$0.00	\$130.74
008 066701500	2300 Broadway	Res	810	0	0	\$172.20	\$0.00	\$0.00	\$172.20
008 066701600	2300 Broadway	Res	850	0	0	\$180.70	\$0.00	\$0.00	\$180.70
008 066701700	2300 Broadway	Res	1160	0	0	\$246.61	\$0.00	\$0.00	\$246.61
008 066701800	2300 Broadway	Res	1270	0	0	\$269.99	\$0.00	\$0.00	\$269.99
008 066701900	2300 Broadway	Res	1270	0	0	\$269.99	\$0.00	\$0.00	\$269.99
008 066702000	2300 Broadway	Res	1105	0	0	\$234.92	\$0.00	\$0.00	\$234.92
008 066702100	2300 Broadway	Res	800	0	0	\$170.07	\$0.00	\$0.00	\$170.07
008 066702200	2300 Broadway	Res	615	0	0	\$130.74	\$0.00	\$0.00	\$130.74
008 066702300	2300 Broadway	Res	810	0	0	\$172.20	\$0.00	\$0.00	\$172.20
008 066702400	2300 Broadway	Res	850	0	0	\$180.70	\$0.00	\$0.00	\$180.70
008 066702500	2300 Broadway	Res	685	0	0	\$145.63	\$0.00	\$0.00	\$145.63
008 066702600	2300 Broadway	Res	795	0	0	\$169.01	\$0.00	\$0.00	\$169.01
008 066702700	2300 Broadway	Res	775	0	0	\$164.76	\$0.00	\$0.00	\$164.76
008 066702800	2300 Broadway	Res	1105	0	0	\$234.92	\$0.00	\$0.00	\$234.92
008 066702900	2300 Broadway	Res	800	0	0	\$170.07	\$0.00	\$0.00	\$170.07
008 066703000	2300 Broadway	Res	820	0	0	\$174.33	\$0.00	\$0.00	\$174.33
008 066703100	2300 Broadway	Res	1080	0	0	\$229.60	\$0.00	\$0.00	\$229.60
008 066703200	2300 Broadway	Res	1115	0	0	\$237.04	\$0.00	\$0.00	\$237.04
008 066703300	2300 Broadway	Res	915	0	0	\$194.52	\$0.00	\$0.00	\$194.52
008 066703400	2300 Broadway	Res	1055	0	0	\$224.29	\$0.00	\$0.00	\$224.29
008 066703500	2300 Broadway	Res	1035	0	0	\$220.03	\$0.00	\$0.00	\$220.03
008 066703600	2300 Broadway	Res	1370	0	0	\$291.25	\$0.00	\$0.00	\$291.25
008 066703700	2300 Broadway	Res	1065	0	0	\$226.41	\$0.00	\$0.00	\$226.41
008 066800100	2350 Webster St	Comm	6500	6500	165	\$507.42	\$507.42	\$1,564.09	\$2,578.94
008 066800202	Webster St	Parking	0	1063	0	\$0.00	\$82.98	\$0.00	\$82.98
008 066800203	367 24Th St	Apt	5703	5000	50	\$445.20	\$390.33	\$473.97	\$1,309.50
008 066800300	355 24Th St	Comm	10000	10000	200	\$780.65	\$780.65	\$1,895.87	\$3,457.17
008 066800400	2315 Valdez St	Govt	0	17200	260	\$0.00	\$1,057.23	\$1,940.61	\$2,997.84
008 066800500	320 23Rd St	Comm	5450	5475	50	\$425.45	\$427.41	\$473.97	\$1,326.83
008 066800600	326 23Rd St	Comm	5900	5950	160	\$460.58	\$464.49	\$1,516.70	\$2,441.77
008 066801102	2340 Webster St	Parking	0	5150	33	\$0.00	\$402.03	\$312.82	\$714.85
008 066801103	2344 Webster St	Comm	3500	4950	45	\$273.23	\$386.42	\$426.57	\$1,086.22
008 066900100	2346 Valdez St	Apt	9678	5950	160	\$755.51	\$464.49	\$1,516.70	\$2,736.70
008 066900200	325 24Th St	Res	2628	0	0	\$558.69	\$0.00	\$0.00	\$558.69
008 066900300	319 24Th St	Res	3176	0	0	\$675.20	\$0.00	\$0.00	\$675.20
008 066900403	2359 Waverly St	Res	3845	0	0	\$817.42	\$0.00	\$0.00	\$817.42



APN	SITE ADDRESS	CODE	Assessable Footages			2018/19 Assessments			
			Bldg SF	Lot Sz	Frontage	Bldg \$	Lot \$	Linear \$	Total \$
008 066900500	2353 Waverly St	Res	1722	0	0	\$366.09	\$0.00	\$0.00	\$366.09
008 066900600	2349 Waverly St	Res	1174	0	0	\$249.58	\$0.00	\$0.00	\$249.58
008 066900700	2345 Waverly St	Comm	3336	6250	50	\$260.42	\$487.91	\$473.97	\$1,222.30
008 066900800	2343 Waverly St	Res	3320	0	0	\$705.81	\$0.00	\$0.00	\$705.81
008 066901100	260 23Rd St	Comm	147150	14783	245	\$11,487.27	\$1,154.03	\$2,322.44	\$14,963.74
008 066901800	2335 Waverly St	Comm	0	55129	575	\$0.00	\$4,303.65	\$5,450.63	\$9,754.28
008 067000100	271 24Th St	Comm	0	3700	131	\$0.00	\$288.84	\$1,241.80	\$1,530.64
008 067000200	265 24Th St	Res	2997	0	0	\$637.14	\$0.00	\$0.00	\$637.14
008 067000300	261 24Th St	Comm	7364	3900	33	\$574.87	\$304.45	\$312.82	\$1,192.14
008 067000400	2359 Harrison St	Comm	0	11151	222	\$0.00	\$870.50	\$2,104.42	\$2,974.92
008 067000500	2337 Harrison St	Apt	10117	12326	89	\$789.78	\$962.23	\$843.66	\$2,595.68
008 067000600	2333 Harrison St	Comm	9281	12375	101	\$724.52	\$966.05	\$957.42	\$2,647.99
008 067000700	2315 Harrison St	Res	2941	0	0	\$625.24	\$0.00	\$0.00	\$625.24
008 067000800	2307 Harrison St	Res	3168	0	0	\$673.49	\$0.00	\$0.00	\$673.49
008 067000900	206 23Rd St	Apt	6766	4200	145	\$528.19	\$327.87	\$1,374.51	\$2,230.57
008 067001000	2306 Waverly St	Apt	10440	8000	180	\$815.00	\$624.52	\$1,706.28	\$3,145.80
008 067001100	2326 Waverly St	Res	4870	0	0	\$1,035.33	\$0.00	\$0.00	\$1,035.33
008 067001200	2330 Waverly St	Res	1368	0	0	\$290.83	\$0.00	\$0.00	\$290.83
008 067001300	2334 Waverly St	Res	1494	0	0	\$317.61	\$0.00	\$0.00	\$317.61
008 067001400	2338 Waverly St	Res	1654	0	0	\$351.63	\$0.00	\$0.00	\$351.63
008 067001500	2342 Waverly St	Res	1404	0	0	\$298.48	\$0.00	\$0.00	\$298.48
008 067001600	2346 Waverly St	Res	1901	0	0	\$404.14	\$0.00	\$0.00	\$404.14
008 067001700	2350 Waverly St	Comm	0	4500	43	\$0.00	\$351.29	\$407.61	\$758.90
008 067001800	2356 Waverly St	Comm	0	3600	40	\$0.00	\$281.03	\$379.17	\$660.21
008 067100402	295 27Th St	Comm	6190	7200	133	\$483.22	\$562.07	\$1,260.75	\$2,306.05
008 067100501	293 27Th St	Comm	2171	2040	31	\$169.48	\$159.25	\$293.86	\$622.59
008 067102001	265 27Th St	Comm	0	41833	780	\$0.00	\$3,265.69	\$7,393.90	\$10,659.59
008 067102101	300 24Th St	Comm	6500	6500	65	\$507.42	\$507.42	\$616.16	\$1,631.00
008 067102303	306 24Th St	Comm	0	43560	39	\$0.00	\$3,400.51	\$369.69	\$3,770.21
008 067102400	310 24Th St	Comm	0	3000	30	\$0.00	\$234.20	\$284.38	\$518.58
008 067102500	322 24Th St	Comm	0	5000	50	\$0.00	\$390.33	\$473.97	\$864.29
008 067102600	326 24Th St	Comm	0	7500	75	\$0.00	\$585.49	\$710.95	\$1,296.44
008 067102702	338 24Th St	Comm	0	1900	120	\$0.00	\$148.32	\$1,137.52	\$1,285.85
008 067102802	2412 Valdez St	Comm	0	3328	25	\$0.00	\$259.80	\$236.98	\$496.78
008 067102902	2416 Valdez St	Comm	0	3180	25	\$0.00	\$248.25	\$236.98	\$485.23
008 067103002	2424 Valdez St	Comm	0	3016	25	\$0.00	\$235.44	\$236.98	\$472.43
008 067103102	2426 Valdez St	Comm	0	3016	25	\$0.00	\$235.44	\$236.98	\$472.43
008 067103202	2430 Valdez St	Comm	0	2880	25	\$0.00	\$224.83	\$236.98	\$461.81
008 067103302	2436 Valdez St	Comm	0	4342	43	\$0.00	\$338.96	\$407.61	\$746.57
008 067103402	Valdez St	Comm	0	5170	55	\$0.00	\$403.60	\$521.36	\$924.96
008 067103502	2452 Valdez St	Comm	0	3760	40	\$0.00	\$293.52	\$379.17	\$672.70
008 067103602	2456 Valdez St	Comm	0	5620	60	\$0.00	\$438.73	\$568.76	\$1,007.49
008 067103703	2460 Valdez St	Comm	0	3077	131	\$0.00	\$240.21	\$1,241.80	\$1,482.00
008 067200100	2550 Webster St	Comm	18142	19825	283	\$1,416.26	\$1,547.64	\$2,682.66	\$5,646.55
008 067200200	329 26Th St	Comm	19750	19825	283	\$1,541.78	\$1,547.64	\$2,682.66	\$5,772.08
008 067200300	329 26Th St	Comm	3942	5125	41	\$307.73	\$400.08	\$388.65	\$1,096.47
008 067200400	2441 Valdez St	Comm	1156	4225	34	\$90.24	\$329.82	\$322.30	\$742.37
008 067200500	2433 Valdez St	Comm	0	6250	50	\$0.00	\$487.91	\$473.97	\$961.87
008 067200600	2429 Valdez St	Res	2470	0	0	\$525.10	\$0.00	\$0.00	\$525.10
008 067200701	Valdez St	Parking	0	3125	25	\$0.00	\$243.95	\$236.98	\$480.94
008 067200702	2425 Valdez St	Apt	22790	6250	50	\$1,779.10	\$487.91	\$473.97	\$2,740.98
008 067200800	2415 Valdez St	Parking	0	4185	34	\$0.00	\$326.70	\$322.30	\$649.00
008 067200900	2409 Valdez St	Comm	0	0	31	\$0.00	\$0.00	\$293.86	\$293.86
008 067201100	354 24Th St	Res	1069	0	0	\$227.26	\$0.00	\$0.00	\$227.26
008 067201200	358 24Th St	Comm	4228	2500	25	\$330.06	\$195.16	\$236.98	\$762.21
008 067201303	366 24Th St	Comm	4000	5000	50	\$312.26	\$390.33	\$473.97	\$1,176.55
008 067201401	2406 Webster St	Comm	7700	7700	75	\$601.10	\$601.10	\$710.95	\$1,913.15
008 067201500	2400 Webster St	Comm	5782	5860	159	\$451.37	\$457.46	\$1,507.22	\$2,416.05
008 067201800	2410 Webster St	Comm	12500	6250	50	\$975.81	\$487.91	\$473.97	\$1,937.69
008 067201900	2428 Webster St	Comm	12500	12500	100	\$975.81	\$975.81	\$947.94	\$2,899.56
008 067202000	2442 Webster St	Comm	6250	6250	50	\$487.91	\$487.91	\$473.97	\$1,449.78
008 067202100	2500 Webster St	Comm	6250	6250	50	\$487.91	\$487.91	\$473.97	\$1,449.78
008 067202300	2401 Valdez St	Res	1200	0	0	\$255.11	\$0.00	\$0.00	\$255.11
008 067202400	352 24Th St	Res	1200	0	0	\$255.11	\$0.00	\$0.00	\$255.11
008 067202500	350 24Th St	Res	1200	0	0	\$255.11	\$0.00	\$0.00	\$255.11
008 067300100	2500 Broadway	Govt	0	525	158	\$0.00	\$32.27	\$1,179.29	\$1,211.56
008 067300200	2436 Broadway	Comm	9587	10058	194	\$748.41	\$785.18	\$1,839.00	\$3,372.58
008 067300300	2404 Broadway	Comm	6831	3483	173	\$533.26	\$271.90	\$1,639.93	\$2,445.09

APN	SITE ADDRESS	CODE	Assessable Footages			2018/19 Assessments			
			Bldg SF	Lot Sz	Frontage	Bldg \$	Lot \$	Linear \$	Total \$
008 067400301	2417 Broadway	Comm	0	24965	40	\$0.00	\$1,948.89	\$379.17	\$2,328.07
008 067400400	2401 Broadway	Comm	15627	15698	238	\$1,219.92	\$1,225.46	\$2,256.09	\$4,701.47
008 067400500	422 24Th St	Comm	753	5950	50	\$58.78	\$464.49	\$473.97	\$997.24
008 067400600	444 24Th St	Comm	5950	5950	50	\$464.49	\$464.49	\$473.97	\$1,402.94
008 067400700	450 24Th St	Comm	5950	5950	50	\$464.49	\$464.49	\$473.97	\$1,402.94
008 067401201	466 24Th St	Apt	8492	7735	65	\$662.93	\$603.83	\$616.16	\$1,882.92
008 067401501	474 24Th St	Comm	7680	7785	65	\$599.54	\$607.74	\$616.16	\$1,823.43
008 067401600	480 24Th St	Comm	5950	7735	50	\$464.49	\$603.83	\$473.97	\$1,542.29
008 067401700	484 24Th St	Comm	2975	2975	25	\$232.24	\$232.24	\$236.98	\$701.47
008 067401800	490 24Th St	Res	1570	0	0	\$333.77	\$0.00	\$0.00	\$333.77
008 067403301	465 25Th St	Comm	5288	14280	120	\$412.81	\$1,114.77	\$1,137.52	\$2,665.10
008 067900100	360 22Nd St	Comm	120061	20250	305	\$9,372.56	\$1,580.82	\$2,891.20	\$13,844.58
008 071500100	449 23Rd St	Comm	17100	7090	7	\$1,334.91	\$553.48	\$66.36	\$1,954.75
008 071605600	1911 Telegraph Ave	Comm	0	74052	1183	\$0.00	\$5,780.87	\$11,214.08	\$16,994.95
008 071605800	1911 Telegraph Ave	Govt	0	45121	700	\$0.00	\$2,773.45	\$5,224.71	\$7,998.16
008 071700100	2150 Franklin St	Comm	215000	28151	505	\$16,783.98	\$2,197.61	\$4,787.08	\$23,768.66
008 071700200	2101 Webster St	Comm	488781	27571	468	\$38,156.69	\$2,152.33	\$4,436.34	\$44,745.36
008 071800100	438 W Grand Ave #401	Res	1629	0	0	\$346.31	\$0.00	\$0.00	\$346.31
008 071800200	438 W Grand Ave #402	Res	1217	0	0	\$258.73	\$0.00	\$0.00	\$258.73
008 071800300	438 W Grand Ave #403	Res	1592	0	0	\$338.45	\$0.00	\$0.00	\$338.45
008 071800400	438 W Grand Ave #404	Res	1592	0	0	\$338.45	\$0.00	\$0.00	\$338.45
008 071800500	438 W Grand Ave #405	Res	2074	0	0	\$440.92	\$0.00	\$0.00	\$440.92
008 071800600	438 W Grand Ave #406	Res	2133	0	0	\$453.46	\$0.00	\$0.00	\$453.46
008 071800700	438 W Grand Ave #407	Res	1594	0	0	\$338.87	\$0.00	\$0.00	\$338.87
008 071800800	438 W Grand Ave #408	Res	1594	0	0	\$338.87	\$0.00	\$0.00	\$338.87
008 071800900	438 W Grand Ave #409	Res	1594	0	0	\$338.87	\$0.00	\$0.00	\$338.87
008 071801000	438 W Grand Ave #410	Res	1762	0	0	\$374.59	\$0.00	\$0.00	\$374.59
008 071801100	438 W Grand Ave #411	Res	1268	0	0	\$269.57	\$0.00	\$0.00	\$269.57
008 071801200	438 W Grand Ave #412	Res	1501	0	0	\$319.10	\$0.00	\$0.00	\$319.10
008 071801300	438 W Grand Ave #413	Res	1501	0	0	\$319.10	\$0.00	\$0.00	\$319.10
008 071801400	438 W Grand Ave #414	Res	1594	0	0	\$338.87	\$0.00	\$0.00	\$338.87
008 071801500	438 W Grand Ave #415	Res	2108	0	0	\$448.15	\$0.00	\$0.00	\$448.15
008 071801600	438 W Grand Ave #416	Res	1338	0	0	\$284.45	\$0.00	\$0.00	\$284.45
008 071801700	438 W Grand Ave #417	Res	1547	0	0	\$328.88	\$0.00	\$0.00	\$328.88
008 071801800	438 W Grand Ave #418	Res	1471	0	0	\$312.72	\$0.00	\$0.00	\$312.72
008 071801900	438 W Grand Ave #419	Res	1471	0	0	\$312.72	\$0.00	\$0.00	\$312.72
008 071802000	438 W Grand Ave #420	Res	2042	0	0	\$434.12	\$0.00	\$0.00	\$434.12
008 071802100	438 W Grand Ave #421	Res	1471	0	0	\$312.72	\$0.00	\$0.00	\$312.72
008 071802200	438 W Grand Ave #422	Res	1471	0	0	\$312.72	\$0.00	\$0.00	\$312.72
008 071802300	438 W Grand Ave #423	Res	1194	0	0	\$253.84	\$0.00	\$0.00	\$253.84
008 071802400	438 W Grand Ave #424	Res	1471	0	0	\$312.72	\$0.00	\$0.00	\$312.72
008 071802500	438 W Grand Ave #425	Res	1471	0	0	\$312.72	\$0.00	\$0.00	\$312.72
008 071802600	438 W Grand Ave #426	Res	1471	0	0	\$312.72	\$0.00	\$0.00	\$312.72
008 071802700	438 W Grand Ave #427	Res	1471	0	0	\$312.72	\$0.00	\$0.00	\$312.72
008 071900100	438 W Grand Ave #428	Res	1388	0	0	\$295.08	\$0.00	\$0.00	\$295.08
008 071900200	438 W Grand Ave #429	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 071900300	438 W Grand Ave #430	Res	1388	0	0	\$295.08	\$0.00	\$0.00	\$295.08
008 071900400	438 W Grand Ave #431	Res	1084	0	0	\$230.45	\$0.00	\$0.00	\$230.45
008 071900500	438 W Grand Ave #432	Res	722	0	0	\$153.49	\$0.00	\$0.00	\$153.49
008 071900600	438 W Grand Ave #433	Res	722	0	0	\$153.49	\$0.00	\$0.00	\$153.49
008 071900700	438 W Grand Ave #434	Res	1388	0	0	\$295.08	\$0.00	\$0.00	\$295.08
008 071900800	438 W Grand Ave #435	Res	1431	0	0	\$304.22	\$0.00	\$0.00	\$304.22
008 071900900	438 W Grand Ave #436	Res	1062	0	0	\$225.77	\$0.00	\$0.00	\$225.77
008 071901000	438 W Grand Ave #437	Res	722	0	0	\$153.49	\$0.00	\$0.00	\$153.49
008 071901100	438 W Grand Ave #438	Res	1062	0	0	\$225.77	\$0.00	\$0.00	\$225.77
008 071901200	438 W Grand Ave #439	Res	722	0	0	\$153.49	\$0.00	\$0.00	\$153.49
008 072000100	438 W Grand Ave #501	Res	1544	0	0	\$328.24	\$0.00	\$0.00	\$328.24
008 072000200	438 W Grand Ave #502	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072000300	438 W Grand Ave #503	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 072000400	438 W Grand Ave #504	Res	1760	0	0	\$374.16	\$0.00	\$0.00	\$374.16
008 072000500	438 W Grand Ave #505	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072000600	438 W Grand Ave #506	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072000700	438 W Grand Ave #507	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 072000800	438 W Grand Ave #508	Res	722	0	0	\$153.49	\$0.00	\$0.00	\$153.49
008 072000900	438 W Grand Ave #509	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072001000	438 W Grand Ave #510	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 072001100	438 W Grand Ave #511	Res	1439	0	0	\$305.92	\$0.00	\$0.00	\$305.92
008 072001200	438 W Grand Ave #512	Res	1188	0	0	\$252.56	\$0.00	\$0.00	\$252.56

APN	SITE ADDRESS	CODE	Assessable Footages			2018/19 Assessments			
			Bldg SF	Lot Sz	Frontage	Bldg \$	Lot \$	Linear \$	Total \$
008 072001300	438 W Grand Ave #513	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072001400	438 W Grand Ave #514	Res	1998	0	0	\$424.76	\$0.00	\$0.00	\$424.76
008 072001500	438 W Grand Ave #515	Res	1183	0	0	\$251.50	\$0.00	\$0.00	\$251.50
008 072001600	438 W Grand Ave #516	Res	1062	0	0	\$225.77	\$0.00	\$0.00	\$225.77
008 072001700	438 W Grand Ave #517	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 072001800	438 W Grand Ave #518	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 072001900	438 W Grand Ave #519	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072002000	438 W Grand Ave #520	Res	1388	0	0	\$295.08	\$0.00	\$0.00	\$295.08
008 072002100	438 W Grand Ave #521	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 072002200	438 W Grand Ave #522	Res	1388	0	0	\$295.08	\$0.00	\$0.00	\$295.08
008 072002300	438 W Grand Ave #523	Res	1062	0	0	\$225.77	\$0.00	\$0.00	\$225.77
008 072002400	438 W Grand Ave #524	Res	922	0	0	\$196.01	\$0.00	\$0.00	\$196.01
008 072002500	438 W Grand Ave #525	Res	722	0	0	\$153.49	\$0.00	\$0.00	\$153.49
008 072002600	438 W Grand Ave #526	Res	1388	0	0	\$295.08	\$0.00	\$0.00	\$295.08
008 072002700	438 W Grand Ave #527	Res	1431	0	0	\$304.22	\$0.00	\$0.00	\$304.22
008 072002800	438 W Grand Ave #528	Res	1062	0	0	\$225.77	\$0.00	\$0.00	\$225.77
008 072002900	438 W Grand Ave #529	Res	722	0	0	\$153.49	\$0.00	\$0.00	\$153.49
008 072003000	438 W Grand Ave #530	Res	1062	0	0	\$225.77	\$0.00	\$0.00	\$225.77
008 072003100	438 W Grand Ave #531	Res	835	0	0	\$177.52	\$0.00	\$0.00	\$177.52
008 072100100	438 W Grand Ave #601	Res	1544	0	0	\$328.24	\$0.00	\$0.00	\$328.24
008 072100200	438 W Grand Ave #602	Res	1262	0	0	\$268.29	\$0.00	\$0.00	\$268.29
008 072100300	438 W Grand Ave #603	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 072100400	438 W Grand Ave #604	Res	1760	0	0	\$374.16	\$0.00	\$0.00	\$374.16
008 072100500	438 W Grand Ave #605	Res	1200	0	0	\$255.11	\$0.00	\$0.00	\$255.11
008 072100600	438 W Grand Ave #606	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072100700	438 W Grand Ave #607	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072100800	438 W Grand Ave #608	Res	722	0	0	\$153.49	\$0.00	\$0.00	\$153.49
008 072100900	438 W Grand Ave #609	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072101000	438 W Grand Ave #610	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 072101100	438 W Grand Ave #611	Res	1439	0	0	\$305.92	\$0.00	\$0.00	\$305.92
008 072101200	438 W Grand Ave #612	Res	1188	0	0	\$252.56	\$0.00	\$0.00	\$252.56
008 072101300	438 W Grand Ave #613	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072101400	438 W Grand Ave #614	Res	1998	0	0	\$424.76	\$0.00	\$0.00	\$424.76
008 072101500	438 W Grand Ave #615	Res	1183	0	0	\$251.50	\$0.00	\$0.00	\$251.50
008 072101600	438 W Grand Ave #616	Res	1062	0	0	\$225.77	\$0.00	\$0.00	\$225.77
008 072101700	438 W Grand Ave #617	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 072101800	438 W Grand Ave #618	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 072101900	438 W Grand Ave #619	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072102000	438 W Grand Ave #620	Res	1388	0	0	\$295.08	\$0.00	\$0.00	\$295.08
008 072102100	438 W Grand Ave #621	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 072102200	438 W Grand Ave #622	Res	1388	0	0	\$295.08	\$0.00	\$0.00	\$295.08
008 072102300	438 W Grand Ave #623	Res	1062	0	0	\$225.77	\$0.00	\$0.00	\$225.77
008 072102400	438 W Grand Ave #624	Res	922	0	0	\$196.01	\$0.00	\$0.00	\$196.01
008 072102500	438 W Grand Ave #625	Res	722	0	0	\$153.49	\$0.00	\$0.00	\$153.49
008 072102600	438 W Grand Ave #626	Res	1388	0	0	\$295.08	\$0.00	\$0.00	\$295.08
008 072102700	438 W Grand Ave #627	Res	1431	0	0	\$304.22	\$0.00	\$0.00	\$304.22
008 072102800	438 W Grand Ave #628	Res	1062	0	0	\$225.77	\$0.00	\$0.00	\$225.77
008 072102900	438 W Grand Ave #629	Res	722	0	0	\$153.49	\$0.00	\$0.00	\$153.49
008 072103000	438 W Grand Ave #630	Res	1062	0	0	\$225.77	\$0.00	\$0.00	\$225.77
008 072103100	438 W Grand Ave #631	Res	835	0	0	\$177.52	\$0.00	\$0.00	\$177.52
008 072200100	438 W Grand Ave #701	Res	1544	0	0	\$328.24	\$0.00	\$0.00	\$328.24
008 072200200	438 W Grand Ave #702	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072200300	438 W Grand Ave #703	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 072200400	438 W Grand Ave #704	Res	1760	0	0	\$374.16	\$0.00	\$0.00	\$374.16
008 072200500	438 W Grand Ave #705	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072200600	438 W Grand Ave #706	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072200700	438 W Grand Ave #707	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072200800	438 W Grand Ave #708	Res	722	0	0	\$153.49	\$0.00	\$0.00	\$153.49
008 072200900	438 W Grand Ave #709	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072201000	438 W Grand Ave #710	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 072201100	438 W Grand Ave #711	Res	1439	0	0	\$305.92	\$0.00	\$0.00	\$305.92
008 072201200	438 W Grand Ave #712	Res	1188	0	0	\$252.56	\$0.00	\$0.00	\$252.56
008 072201300	438 W Grand Ave #713	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072201400	438 W Grand Ave #714	Res	1998	0	0	\$424.76	\$0.00	\$0.00	\$424.76
008 072201500	438 W Grand Ave #715	Res	1183	0	0	\$251.50	\$0.00	\$0.00	\$251.50
008 072201600	438 W Grand Ave #716	Res	1062	0	0	\$225.77	\$0.00	\$0.00	\$225.77
008 072201700	438 W Grand Ave #717	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 072201800	438 W Grand Ave #718	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50

APN	SITE ADDRESS	CODE	Assessable Footages			2018/19 Assessments			
			Bldg SF	Lot Sz	Frontage	Bldg \$	Lot \$	Linear \$	Total \$
008 072201900	438 W Grand Ave #719	Res	1139	0	0	\$242.14	\$0.00	\$0.00	\$242.14
008 072202000	438 W Grand Ave #720	Res	1388	0	0	\$295.08	\$0.00	\$0.00	\$295.08
008 072202100	438 W Grand Ave #721	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 072202200	438 W Grand Ave #722	Res	1388	0	0	\$295.08	\$0.00	\$0.00	\$295.08
008 072202300	438 W Grand Ave #723	Res	1062	0	0	\$225.77	\$0.00	\$0.00	\$225.77
008 072202400	438 W Grand Ave #724	Res	922	0	0	\$196.01	\$0.00	\$0.00	\$196.01
008 072202500	438 W Grand Ave #725	Res	722	0	0	\$153.49	\$0.00	\$0.00	\$153.49
008 072202600	438 W Grand Ave #726	Res	1388	0	0	\$295.08	\$0.00	\$0.00	\$295.08
008 072202700	438 W Grand Ave #727	Res	1431	0	0	\$304.22	\$0.00	\$0.00	\$304.22
008 072202800	438 W Grand Ave #728	Res	1062	0	0	\$225.77	\$0.00	\$0.00	\$225.77
008 072202900	438 W Grand Ave #729	Res	722	0	0	\$153.49	\$0.00	\$0.00	\$153.49
008 072203000	438 W Grand Ave #730	Res	1062	0	0	\$225.77	\$0.00	\$0.00	\$225.77
008 072203100	438 W Grand Ave #731	Res	835	0	0	\$177.52	\$0.00	\$0.00	\$177.52
008 073900100	461 24Th St	Apt	4982	3955	35	\$388.92	\$308.75	\$331.78	\$1,029.44
008 073900300	415 24Th St	Comm	32192	10995	245	\$2,513.07	\$858.32	\$2,322.44	\$5,693.84
008 073900800	2380 Valley St	Apt	7436	4520	153	\$580.49	\$352.85	\$1,450.34	\$2,383.69
008 073900900	2350 Valley St	Apt	70199	32848	424	\$5,480.09	\$2,564.28	\$4,019.25	\$12,063.61
008 073901000	400 23Rd St	Comm	9416	9397	182	\$735.06	\$733.58	\$1,725.24	\$3,193.88
008 073901100	2301 Broadway	Comm	21865	21315	102	\$1,706.89	\$1,663.96	\$966.89	\$4,337.74
008 073901200	2327 Broadway	Parking	0	42740	146	\$0.00	\$3,336.50	\$1,383.99	\$4,720.48
008 073901300	2345 Broadway	Comm	40024	26661	150	\$3,124.47	\$2,081.29	\$1,421.90	\$6,627.67
008 073901400	421 24Th St	Apt	33654	16702	157	\$2,627.20	\$1,303.84	\$1,488.26	\$5,419.30
008 074001100	1755 Broadway #33	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 074001200	1755 Broadway #34	Res	823	0	0	\$174.96	\$0.00	\$0.00	\$174.96
008 074001300	1755 Broadway #35	Res	1241	0	0	\$263.83	\$0.00	\$0.00	\$263.83
008 074001400	1755 Broadway #36	Res	977	0	0	\$207.70	\$0.00	\$0.00	\$207.70
008 074001500	1755 Broadway #41	Res	905	0	0	\$192.40	\$0.00	\$0.00	\$192.40
008 074001600	1755 Broadway #42	Res	1203	0	0	\$255.75	\$0.00	\$0.00	\$255.75
008 074001700	1755 Broadway #43	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 074001800	1755 Broadway #44	Res	823	0	0	\$174.96	\$0.00	\$0.00	\$174.96
008 074001900	1755 Broadway #45	Res	1241	0	0	\$263.83	\$0.00	\$0.00	\$263.83
008 074002000	1755 Broadway #46	Res	977	0	0	\$207.70	\$0.00	\$0.00	\$207.70
008 074002100	1755 Broadway #51	Res	905	0	0	\$192.40	\$0.00	\$0.00	\$192.40
008 074002200	1755 Broadway #52	Res	1203	0	0	\$255.75	\$0.00	\$0.00	\$255.75
008 074002300	1755 Broadway #53	Res	802	0	0	\$170.50	\$0.00	\$0.00	\$170.50
008 074002400	1755 Broadway #54	Res	823	0	0	\$174.96	\$0.00	\$0.00	\$174.96
008 074002500	1755 Broadway #55	Res	1241	0	0	\$263.83	\$0.00	\$0.00	\$263.83
008 074002600	1755 Broadway #56	Res	977	0	0	\$207.70	\$0.00	\$0.00	\$207.70
008 074002800	1749 Broadway #1	Res	2500	0	0	\$531.48	\$0.00	\$0.00	\$531.48
008 074002900	1749 Broadway #2	Comm	3800	8044	6	\$296.65	\$627.95	\$56.88	\$981.48
008 074101000	Thomas L Berkley Wa	Comm	236656	0	0	\$18,474.55	\$0.00	\$0.00	\$18,474.55
009 068300200	2523 Broadway	Comm	3425	3425	30	\$267.37	\$267.37	\$284.38	\$819.13
009 068300300	2511 Broadway	Comm	0	13205	91	\$0.00	\$1,030.85	\$862.62	\$1,893.47
009 068303700	2555 Broadway	Comm	13750	16369	122	\$1,073.39	\$1,277.85	\$1,156.48	\$3,507.72
009 068501806	2630 Broadway	Comm	0	45489	467	\$0.00	\$3,551.10	\$4,426.86	\$7,977.96
010 076800100	2350 Harrison St	Comm	2100	5634	226	\$163.94	\$439.82	\$2,142.33	\$2,746.09
010 076800201	2344 Harrison St	Comm	5219	6868	114	\$407.42	\$536.15	\$1,080.65	\$2,024.22
010 076800203	Bay Pl	Comm	0	0	50	\$0.00	\$0.00	\$473.97	\$473.97
010 076800204	2340 Harrison St	Comm	2000	9279	81	\$156.13	\$724.37	\$767.83	\$1,648.32
010 076800205	2336 Harrison St	Comm	2699	2399	30	\$210.70	\$187.28	\$284.38	\$682.36
010 076800300	123 Bay Pl	Apt	14495	6780	51	\$1,131.55	\$529.28	\$483.45	\$2,144.28
010 076800400	200 Grand Ave	Govt	44156	10018	910	\$2,714.14	\$615.78	\$6,792.12	\$10,122.04
010 076800500	2332 Harrison St	Comm	41665	13300	88	\$3,252.58	\$1,038.26	\$834.18	\$5,125.03
010 079502701	230 Bay Pl	Comm	45308	94961	668	\$3,536.97	\$7,413.13	\$6,332.21	\$17,282.31
<b>TOTAL ASSESSMENT</b>						<b>\$773,094</b>	<b>\$299,283</b>	<b>\$436,943</b>	<b>\$1,509,320</b>

# Exhibit B

## CITY OF OAKLAND LAKE MERRITT-UPTOWN COMMUNITY BENEFIT DISTRICT 2018 PROPERTY OWNER BALLOT

This ballot is for the property owners of the parcel(s) identified below by Assessment Parcel Numbers (APN), which parcel(s) is/are located within the proposed Lake Merritt-Uptown Community Benefit District 2018 (hereinafter "Lake Merritt-Uptown CBD 2018") in the City of Oakland. A Copy of the Community Benefit District Plan is enclosed with this Ballot. Please advise the City of Oakland as soon as possible at (510) 238-6176, if the owner and/or assessment information set forth below is incorrect.

This ballot may be used to express either support for, or opposition to, the proposed Lake Merritt-Uptown CBD 2018 assessment. In order to be counted, this ballot must be completed, signed, and dated below by an owner of the identified parcel(s) or by an authorized representative of the owner. **The ballot must be received by the City Clerk of Oakland either by the date and time stated below. It may be delivered by mail or in person to: Office of the City Clerk, Oakland City Hall, One Frank H. Ogawa Plaza, First Floor, Oakland, CA, 94612, Attn: Lake Merritt-Uptown CBD 2018.** If a majority (as weighted by assessment amount) of ballots received oppose the Lake Merritt-Uptown CBD 2018 assessment, the Lake Merritt-Uptown CBD 2018 will not be established and the Lake Merritt-Uptown CBD 2018 assessment will not be levied.

**Mail Delivery:** If by mail, fold and insert the ballot in the enclosed pre-addressed envelope, seal the envelope, add postage, and deposit in the U.S. mail.

**Personal Delivery:** If in person, fold and insert the ballot in the enclosed pre-addressed envelope, seal the envelope provided, and deliver to the City Clerk's office (address shown above) or deliver to the City Clerk at the public hearing on the Lake Merritt-Uptown CBD 2018.

The assessment shall not be imposed if the ballots submitted in opposition to the assessment exceed the ballots submitted in favor of the assessment, with the ballots weighted according to the proportional financial obligation of the affected property.

**IN ORDER TO BE COUNTED, THIS BALLOT MUST BE RECEIVED BY THE CITY CLERK PRIOR TO THE CLOSE OF THE PUBLIC INPUT PORTION OF THE PUBLIC HEARING ON THE LAKE MERRITT-UPTOWN COMMUNITY BENEFIT DISTRICT 2018, WHICH IS SCHEDULED FOR JULY 17, 2018, AT 6:30 PM IN THE CITY COUNCIL CHAMBERS, OAKLAND CITY HALL, 1 FRANK OGAWA PLAZA, OAKLAND, CALIFORNIA 94612. To cast this ballot, check the appropriate box below (either yes or no), sign the ballot at the bottom, and return either this entire page or the portion below this line.**

### BALLOT

*Please mark in the box below to cast your vote:*

**YES**, I am in favor of the formation of the district and the proposed assessments on the parcel(s) identified on this ballot.

**NO**, I oppose the formation of the district and the proposed assessment on the parcel(s) identified on this ballot.

**Owner**  
Xxxx

**APN**  
xxxx

**Assessment**  
\$xxxxxx

Total Lake Merritt-Uptown Community Benefit District 2018 Proposed Initial Annual Assessment Amount (Votes Eligible)

\$ \_\_\_\_\_

\_\_\_\_\_  
NAME (PRINTED)

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

**DRAFT**

FILED  
OFFICE OF THE CITY CLERK  
OAKLAND

Oakland City Attorney's Office

OAKLAND CITY COUNCIL

APR 26 PM 5:15

RESOLUTION No. \_\_\_\_\_ C.M.S.

**RESOLUTION AUTHORIZING THE CITY ADMINISTRATOR (1) TO SIGN THE BALLOT IN FAVOR OF THE FORMATION OF THE LAKE MERRITT-UPTOWN COMMUNITY BENEFIT DISTRICT 2018 ("LCBD 2018"); AND (2) TO PAY A CUMULATIVE FISCAL YEAR 2018-2019 FAIR SHARE ASSESSMENT IN AN APPROXIMATE AMOUNT OF \$67,795.41 FOR SEVEN (7) CITY-OWNED PROPERTIES ON WHICH ASSESSMENTS ARE TO BE LEVIED (1731 FRANKLIN APN 008 062300601; 274 19<sup>TH</sup> ST APN 008 063500100; 2025 BROADWAY APN 008 064900500; GRAND AVE APN 008 065500600; 200 GRAND AVE APN 010 076800400; 2500 BROADWAY APN 008 067300100; 1911 TELEGRAPH APN 008 071605800), IF THE LCBD 2018 IS ESTABLISHED**

**WHEREAS**, the City Council approved an Oakland Business Improvement Management District Ordinance (Ord. 12190, 1999) delineating procedures and policies for the formation of a property assessment district within the City of Oakland; and

**WHEREAS**, the City Council approved a Neighborhood Business Improvement District Program pursuant to Oakland City Council Resolution No. 75323, dated November 9, 1999, to provide technical and financial assistance to stakeholder groups of business owners in the City to assist in the formation of such districts; and

**WHEREAS**, the City has adopted a policy encouraging the formation of Business Improvement Districts; and

**WHEREAS**, pursuant to the requirements of the Oakland Business Management District Ordinance stakeholders in the Lake Merritt-Uptown district (generally around the Broadway corridor roughly bounded by 17<sup>th</sup> Street to the south, Telegraph Avenue to the west, 25<sup>th</sup> Street to the north and Lakeside Drive and Alice Street to the east) have circulated a Petition to form the Lake Merritt-Uptown Community Benefit District 2018 (hereinafter "District") to undertake the Management District Plan for the Lake Merritt-Uptown Community Benefit District 2018 (hereinafter "Plan"); and

**WHEREAS**, if the Petition in support of formation of the District is signed by more than 30 percent of the weighted value of the assessments that would be imposed on properties within the proposed District, then the City may adopt a Resolution of Intention and cause ballots to be distributed to all property owners within the boundaries of the proposed District; through such ballots, votes in favor of or against the formation of the proposed District may be cast by the affected property owners, and such ballots will be tabulated at a public hearing, and

**WHEREAS**, concurrently with this proposed resolution, the Council is considering the passage of a Resolution of Intention to form the District; and

**WHEREAS**, the proposed District includes seven (7) City-owned properties on which assessments are to be levied (1731 Franklin APN 008 062300601; 274 19<sup>th</sup> St APN 008 063500100; 2025 Broadway APN 008 064900500; Grand Ave APN 008 065500600; 200 Grand Ave APN 010 076800400; 2500 Broadway APN 008 067300100; 1911 Telegraph APN 008 071605800) which gives the City the right to sign the ballots in support of District formation (the "Ballots"); and

**WHEREAS**, this resolution will authorize the City Administrator to sign the Ballots on behalf of the City of Oakland; and

**WHEREAS**, if the District is established, the assessments will take place on a yearly basis for the ten-year life of the District; and

**WHEREAS**, if the District is established, the cumulative maximum total assessment amount over the ten-year life of the district for the seven (7) City-owned properties on which assessments are to be levied (1731 Franklin APN 008 062300601; 274 19<sup>th</sup> St APN 008 063500100; 2025 Broadway APN 008 064900500; Grand Ave APN 008 065500600; 200 Grand Ave APN 010 076800400; 2500 Broadway APN 008 067300100; 1911 Telegraph APN 008 071605800) is approximately \$892,970.12; and

**WHEREAS**, funds to pay the FY 2018-2019 assessment will be budgeted as follows:

For APN:	Fund Source Coding Block	Amount
008 062300601 008 063500100 008 064900500 008 065500600 010 076800400 008 067300100	General Purpose Fund (1010)/Citywide Activities Organization (90591)/Taxes and Assessments (53511)/Business Improvement District Project (1000147)/IP50	\$ 59,797.25
008 071605800	Central District Projects Fund (5610)/Central District Redevelopment Organization (85245)/Taxes and Assessments (53511)/Downtown Capital Project (1000169)/SC13	\$ 7,998.16
	<b>Total FY 2018-2019 LCBD 2018 City Assessment Amount</b>	<b>\$ 67,795.41</b>

; and.

**WHEREAS**, these assessments are to be made in accordance with the provisions of Proposition 218 and the Oakland Business Improvement Management District policy referenced above; now therefore be it

**RESOLVED**, that the City Council hereby authorizes the City Administrator (1) to execute the ballots in favor of the formation of the Lake Merritt-Uptown Community Benefit District 2018 and (2) to pay the FY 2018-2019 cumulative fair share assessment for seven (7) City-owned properties on which assessments are to be levied (1731 Franklin APN 008 062300601; 274 19<sup>th</sup> St APN 008 063500100; 2025 Broadway APN 008 064900500; Grand Ave APN 008 065500600; 200 Grand Ave APN 010 076800400; 2500 Broadway APN 008 067300100; 1911 Telegraph APN 008 071605800), if the LCBD 2018 is established) in an approximate amount of \$67,795.41 from the General Purpose Fund (1010)/Citywide Activities Organization (90591)/Taxes and Assessments (53511)/Business Improvement District Project (1000147)/IP50 and the Central District Projects Fund (5610)/Central District Redevelopment Organization (85245)/Taxes and Assessments (53511)/Downtown Capital Project (1000169)/SC13 as more specifically described in the recitals above.

IN COUNCIL, OAKLAND, CALIFORNIA, \_\_\_\_\_, 2018\_

**PASSED BY THE FOLLOWING VOTE:**

AYES- BROOKS, GALLO, GIBSON MCELHANEY, KALB, KAPLAN, REID, SCHAAF  
and PRESIDENT KERNIGHAN

NOES-

ABSENT-

ABSTENTION-

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



**DRAFT**FILED  
OFFICE OF THE CITY CLERK  
OAKLAND**OAKLAND REDEVELOPMENT  
SUCCESSOR AGENCY**

RESOLUTION No. - \_\_\_\_\_

RESOLUTION (1) AUTHORIZING THE AGENCY ADMINISTRATOR TO SIGN THE BALLOT IN FAVOR OF THE FORMATION OF THE LAKE MERRITT-UPTOWN COMMUNITY BENEFIT DISTRICT 2018 ("LCBD 2018"); AND (2) TO PAY A FISCAL YEAR 2018-2019 FAIR SHARE ASSESSMENT IN AN APPROXIMATE AMOUNT OF \$1,217.84 FOR ONE (1) OAKLAND REDEVELOPMENT SUCCESSOR AGENCY-OWNED PROPERTY (490 THOMAS L. BERKLEY WAY APN 008 064900900) IF THE LCBD 2018 IS ESTABLISHED

**WHEREAS**, the Oakland City Council approved an Oakland Business Improvement Management District Ordinance (Ord. 12190, 1999) delineating procedures and policies for the formation of a property assessment district within the City of Oakland; and

**WHEREAS**, the Oakland City Council approved a Neighborhood Business Improvement District Program pursuant to Oakland City Council Resolution No. 75323, dated November 9, 1999, to provide technical and financial assistance to stakeholder groups of business owners in the City to assist in the formation of such districts; and

**WHEREAS**, the City of Oakland has adopted a policy encouraging the formation of Business Improvement Districts; and

**WHEREAS**, pursuant to the requirements of the Oakland Business Management District Ordinance stakeholders in the Lake Merritt-Uptown district have circulated a Petition to form the Lake Merritt-Uptown Community Benefit District 2018 (hereinafter "District") to undertake the Management District Plan for the Lake Merritt-Uptown Community Benefit District 2018 (hereinafter "Plan"); and

**WHEREAS**, if the Petition in support of formation of the District is signed by more than 30 percent of the weighted value of the assessments that would be imposed on properties within the proposed District, then the Oakland City Council may adopt a Resolution of Intention and cause ballots to be distributed to all property owners within the boundaries of the proposed District; through such ballots, votes in favor of or against the formation of the proposed District may be cast by the affected property owners, and such ballots will be tabulated at a public hearing, and

**WHEREAS**, concurrently with this proposed resolution, the Oakland City Council is considering the passage of a Resolution of Intention to form the District; and

**WHEREAS**, the proposed District includes one (1) Successor Agency-owned property on which assessments are to be levied (490 Thomas L. Berkley Way APN 008 064900900) which gives the Successor Agency the right to sign the ballot in support of District formation (the "Ballot"); and

**WHEREAS**, this resolution will authorize the Agency Administrator to sign the Ballot on behalf of the Successor Agency; and

**WHEREAS**, if the District is established, the assessments will take place on a yearly basis for the ten-year life of the District; and

**WHEREAS**, if the District is established, the cumulative maximum total assessment amount over the ten-year life of the district for the one (1) Successor Agency-owned property (490 Thomas L. Berkley Way APN 008 064900900) is approximately \$15,977.32; and

**WHEREAS**, funds to pay the FY 2018-2019 assessment have been budgeted as follows:

For APN:	Fund Source Coding Block	Amount
008 064900900	Central District Projects Fund (5610)/Central District Redevelopment Organization (85245)/Taxes and Assessments (53511)/Downtown Capital Project (1000169)/SC13	\$ 1,217.84

; and

**WHEREAS**, these assessments are to be made in accordance with the provisions of Proposition 218 and the Oakland Business Improvement Management District policy referenced above; now therefore be it

**RESOLVED**, that the Oakland Redevelopment Successor Agency hereby authorizes the Agency Administrator (1) to execute the ballot in favor of the formation of the Lake Merritt-Uptown Community Benefit District 2018 and (2) to pay the FY 2018-2019 assessment for the one (1) Successor Agency-owned property on which assessments are to be levied (490 Thomas L. Berkley Way APN 008 064900900) in a approximate amount of \$1,217.84 from funding source Central District Projects Fund (5610)/Central District Redevelopment Organization (85245)/Taxes and Assessments (53511)/Downtown Capital Project (1000169)/SC13.

IN SUCCESSOR AGENCY, OAKLAND, CALIFORNIA, \_\_\_\_\_, 2018.

**PASSED BY THE FOLLOWING VOTE:**

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

NOES-

ABSTENTIONS-

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

LATONDA SIMMONS  
Secretary of the Oakland  
Redevelopment Successor Agency