



# CITY OF ALAMEDA

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## Island City Landscaping and Lighting Assessment District No. 84-2

### Fiscal Year 2018/19 Engineer's Report

May 2018

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Prepared by:



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# 1. ENGINEER'S LETTER

**WHEREAS**, on February 20, 2018, the City Council of the City of Alameda (the "City"), State of California, under the Landscaping and Lighting Act of 1972 (the "Act"), adopted its Resolution Appointing an Engineer and an Attorney for the Island City Landscaping and Lighting Assessment District No. 84-2 (the "District");

**WHEREAS**, said Resolution directed the engineer to prepare and file a report (the "Report");

**WHEREAS**, pursuant to the Act, the Report is required to present plans and specifications describing the general nature, location and extent of the improvements to be maintained, a diagram for the District, showing the area and properties to be assessed, and an estimate of the costs to maintain and service the improvements for the referenced fiscal year, assessing the net amount upon all assessable lots and/or parcels within the District in proportion to the special benefit received;

**NOW THEREFORE**, the following assessment is proposed to be authorized in order to pay for the estimated costs of maintenance, operation and servicing of improvements to be paid by the assessable real property within the boundaries of the District in proportion to the special benefit received.

## SUMMARY OF ASSESSMENT FISCAL YEAR 2018/19

| Zone  | Zone   | Total<br>2018/19 |
|-------|--|------------------|
| 1     | Lincoln Avenue between Sherman and St. Charles Streets   | \$4,800          |
| 4     | Park Street from the Bridge to San Jose Avenue,<br>including areas of Webb, Santa Clara, and Central | 60,313           |
| 5     | Harbor Bay Business Park   | 930,723          |
| 6     | Alameda Marina Village Commercial Areas  | 433,849          |
| 7     | 1100 and 1200 blocks of Bay Street   | 3,900            |
| 8     | Webster Street between Central and Atlantic  | 71,684           |
| Total |  | \$1,505,269      |

I, the undersigned, respectfully submit the enclosed Report and, to the best of my knowledge, information and belief, the Report, assessments, and the assessment diagram herein have been prepared and computed in accordance with the order of the City Council of the City.

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Scott Wickstrom  
City Engineer

## 2. PLANS AND SPECIFICATIONS

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The District provides for and ensures the continued maintenance and servicing of landscaping and lighting improvements within the boundaries of the District, which provide a special benefit to the parcels within the District.

The plans and specifications for the District, which are combined with the diagram for the District, have been separately bound and are incorporated by reference herein.

### **Boundaries**

The District is located in the City of Alameda. The areas of the improvement include: Lincoln Avenue between Sherman Street and St. Charles Street (Zone 1), Park Street from the bridge to San Jose Avenue including areas of Webb, Santa Clara, and Central (Zone 4), Harbor Bay Business Park (Zone 5), Alameda Marina Village commercial areas (Zone 6), and the 1100 and 1200 blocks of Bay Street (Zone 7), and Webster Street between Central Avenue and Atlantic Avenue (Zone 8).

### **Description of Improvements and Services**

The improvements provided within the District include, but are not limited to, the operation, maintenance, and servicing of all public landscaping improvements, consisting of trees, medians, refuse containers, sidewalks, plant materials, pathways, irrigation systems, lighting systems, and associated appurtenant facilities. Services include, but are not limited to, personnel, materials, contracting services, electrical energy, and water required for all necessary maintenance, replacement, and repair required to keep the above-mentioned improvements in a healthy, vigorous and satisfactory condition.

### 3. ESTIMATE OF COSTS

#### Budgets

The estimated Fiscal Year 2018/19 costs of servicing, maintaining, repairing and replacing the actual improvements as described in the Plans and Specifications, the fund balances, and any Capital Improvement Plans are summarized in the following tables:

| <b>ZONE 1:</b>                                  | <b>FY 2018/19</b> |
|---|-------------------|
| Median Maintenance                              | \$3,278           |
| Irrigation - Electrical                         | 183               |
| Water   | 1,366             |
| Incidental/Misc. Expenses                       | 2,709             |
| Landscape Reserves                              | 0                 |
| Administration                                  | 466               |
| County Fees                                     | 94                |
| <b>Subtotal</b>                                 | <b>\$8,096</b>    |
| Allocation from Reserve                         | (3,296)           |
| <b>Total Zone 1</b>                             | <b>\$4,800</b>    |
| <b>Zone 1 Fund Balance:</b>                     |                   |
| Estimated Zone 1 Fund Balance as of 6/30/2018   | \$31,842.84       |
| FY 2018/19 Budgeted Reserve Collection (Use)    | (3,296.00)        |
| FY 2018/19 Budgeted Capital Use of Reserves     | (10,125.00)       |
| Anticipated Ending Fund Balance as of 6/30/2019 | \$18,421.84       |

| <b>Zone 1 Capital Improvement Budget</b>                                | <b>FY 2018/19</b> | <b>FY 2019/20</b> | <b>Total Capital</b> |
|---|-------------------|-------------------|----------------------|
| Replace Median Landscaping on Lincoln between Sherman and St Charles St | \$10,125          | \$10,125          | \$20,250             |
| <b>Total by Fiscal Year</b>   | <b>\$10,125</b>   | <b>\$10,125</b>   | <b>\$20,250</b>      |

| <b>ZONE 4:</b>                                  | <b>FY 2018/19</b> |
|---|-------------------|
| Landscape Maintenance                           | \$3,015           |
| District Maintenance                            | 47,033            |
| Irrigation – Electrical                         | 1,196             |
| Water   | 6,490             |
| Holiday Decorations/Banners                     | 2,900             |
| Incidental/Misc. Expenses                       | 1,748             |
| Administration                                  | 7,490             |
| County Fees                                     | 1,024             |
| <b>Subtotal</b>                                 | <b>\$70,896</b>   |
| City Contribution                               | (7,421)           |
| Allocation from Reserve                         | (3,162)           |
| <b>Total Zone 4</b>                             | <b>\$60,313</b>   |
| <b>Zone 4 Fund Balance:</b>                     |                   |
| Estimated Zone 4 Fund Balance as of 6/30/2018   | \$3,161.51        |
| FY 2018/19 Budgeted Reserve Collection (Use)    | (3,161.51)        |
| Anticipated Ending Fund Balance as of 6/30/2019 | \$0.00            |

| <b>ZONE 5:</b>         | <b>FY 2018/19</b> |
|------------------------|-------------------|
| <b>Offsite Budget:</b> |                   |
| Supervision & Admin.   | \$6,904           |
| Subcontractor          | 47,217            |

|   |                  |
|---|------------------|
| Utilities – Electrical                          | 3,323            |
| Water   | 25,530           |
| Overscope                                       | 11,319           |
| Miscellaneous Expenses                          | 5,745            |
| <b>Subtotal</b>                                 | <b>\$100,038</b> |
| City Contribution                               | (28,853)         |
| <b>Total Offsite</b>                            | <b>\$71,185</b>  |
| <b>Onsite Budget:</b>                           |                  |
| Fountain and Exterior Maintenance               | \$46,968         |
| Utilities – Electrical                          | 23,259           |
| Water   | 199,722          |
| Sod/Irrigation Extra Maintenance                | 83,258           |
| Subcontractor                                   | 210,254          |
| Supervision & Admin.                            | 75,199           |
| Ferry Terminal Lot Maintenance                  | 85,716           |
| Incidental Expenses                             | 10,989           |
| Miscellaneous Expenses                          | 83,215           |
| County Fees                                     | 15,081           |
| <b>Subtotal</b>                                 | <b>\$833,661</b> |
| City Contribution                               | (15,000)         |
| <b>Total Onsite</b>                             | <b>\$818,661</b> |
| Collection for Capital Reserves                 | 40,877           |
| <b>Total Zone 5</b>                             | <b>\$930,723</b> |
| <b>Zone 5 Fund Balance:</b>                     |                  |
| Estimated Zone 5 Fund Balance as of 6/30/2018   | \$320,953.01     |
| FY 2018/19 Budgeted Reserve Collection (Use)    | 40,877.37        |
| FY 2018/19 Budgeted Capital Use of Reserves     | (98,010.00)      |
| Anticipated Ending Fund Balance as of 6/30/2019 | \$263,820.38     |

| <b>Zone 5 Capital Improvement Budget</b>   | <b>FY<br/>2018/19</b> | <b>FY<br/>2019/20</b> | <b>FY<br/>2020/21</b> | <b>FY<br/>2021/22</b> | <b>FY<br/>2022/23</b> | <b>Total Capital<br/>Improvement Budget</b> |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|---|
| Replace Bike Racks                         | \$1,350               | \$0                   | \$0                   | \$1,350               | \$0                   | \$2,700                                     |
| Replace Monument Sign                      | 0                     | 0                     | 0                     | 0                     | 40,500                | 40,500                                      |
| Replace Signage- Park Rules                | 0                     | 1,013                 | 0                     | 0                     | 0                     | 1,013                                       |
| Replace Site Furnishings- Concrete BBQ     | 0                     | 0                     | 0                     | 8,100                 | 0                     | 8,100                                       |
| Replace Site Furnishings- Park Benches     | 0                     | 0                     | 0                     | 6,480                 | 0                     | 6,480                                       |
| Replace Site Furnishings- Picnic Tables    | 0                     | 0                     | 22,950                | 0                     | 0                     | 22,950                                      |
| Replace Site Furnishings- Steel BBQ        | 0                     | 1,350                 | 0                     | 0                     | 0                     | 1,350                                       |
| Lavatory-Replace Faucet- Restroom 1        | 0                     | 594                   | 0                     | 0                     | 0                     | 594   |
| Lavatory-Replace Faucet- Restroom 2        | 0                     | 594                   | 0                     | 0                     | 0                     | 594   |
| Paint Exterior Doors- Restroom 1           | 0                     | 270                   | 0                     | 0                     | 0                     | 270   |
| Paint Exterior Doors- Restroom 2           | 0                     | 270                   | 0                     | 0                     | 0                     | 270   |
| Rebuild Flush Valves- Restroom 1           | 0                     | 1,944                 | 0                     | 0                     | 0                     | 1,944                                       |
| Rebuild Flush Valves- Restroom 2           | 0                     | 1,296                 | 0                     | 0                     | 0                     | 1,296                                       |
| Repaint Interior Wall Surfaces- Restroom 1 | 0                     | 810                   | 0                     | 0                     | 0                     | 810   |
| Repaint Interior Wall Surfaces- Restroom 2 | 0                     | 638                   | 0                     | 0                     | 0                     | 638   |
| Repaint Roof Fascia- Restroom 1            | 0                     | 304                   | 0                     | 0                     | 0                     | 304   |
| Repaint Roof Fascia- Restroom 2            | 0                     | 304                   | 0                     | 0                     | 0                     | 304   |
| Replace 12' High Site Lighting             | 68,310                | 0                     | 0                     | 0                     | 0                     | 68,310                                      |
| Replace Bollard Lighting                   | 28,350                | 0                     | 0                     | 0                     | 0                     | 28,350                                      |
| Sod/Irrigation Replacement                 | 0                     | 100,000               | 0                     | 100,000               | 0                     | 200,000                                     |
| <b>Total by Fiscal Year</b>                | <b>\$98,010</b>       | <b>\$109,387</b>      | <b>\$22,950</b>       | <b>\$115,930</b>      | <b>\$40,500</b>       | <b>\$386,777</b>                            |

| <b>ZONE 6:</b>                                  | <b>FY 2018/19</b> |
|---|-------------------|
| Landscape Maintenance                           | \$236,688         |
| Street Light Maintenance                        | 1,900             |
| Parking Lot Maintenance                         | 20,656            |
| Utilities – Electrical                          | 37,813            |
| Water   | 95,694            |
| Graffiti/Exterior Repair                        | 21,939            |
| Janitorial Services and Litter Removal          | 48,563            |
| Contract Management                             | 41,426            |
| Incidental/Misc. Expenses                       | 50,498            |
| County Fees                                     | 7,771             |
| <b>Subtotal</b>                                 | <b>\$562,949</b>  |
| Allocation from Reserve                         | (129,101)         |
| <b>Total Zone 6</b>                             | <b>\$433,848</b>  |
| <b>Zone 6 Fund Balance:</b>                     |                   |
| Estimated Zone 6 Fund Balance as of 6/30/2018   | \$835,859.84      |
| FY 2018/19 Budgeted Reserve Collection (Use)    | (129,101.00)      |
| FY 2018/19 Budgeted Capital Use of Reserves     | (277,131.00)      |
| Anticipated Ending Fund Balance as of 6/30/2019 | \$429,627.84      |



| <b>Zone 6 Capital Improvement Budget</b> | <b>FY<br/>2018/19</b> | <b>FY<br/>2019/20</b> | <b>FY<br/>2020/21</b> | <b>FY<br/>2021/22</b> | <b>FY<br/>2022/23</b> | <b>Total Capital<br/>Improvement Budget</b> |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|---|
| Repaint Bollards                         | \$270                 | \$0                   | \$270                 | \$0                   | \$0                   | \$540                                       |
| Replace Bollards                         | 0                     | 0                     | 0                     | 0                     | 203                   | 203   |
| Repaint Guardrails                       | 0                     | 0                     | 0                     | 0                     | 422                   | 422   |
| Replace Wood Decking                     | 0                     | 24,705                | 0                     | 0                     | 0                     | 24,705                                      |
| Replace Concrete 6' Wide                 | 6,917                 | 111,481               | 0                     | 0                     | 0                     | 111,481                                     |
| Replace Park Signs                       | 0                     | 0                     | 0                     | 1,350                 | 0                     | 1,350                                       |
| Replace Park Benches                     | 0                     | 0                     | 0                     | 0                     | 0                     | 6,917                                       |
| Replace Picnic Tables                    | 0                     | 0                     | 0                     | 4,860                 | 0                     | 4,860                                       |
| Replace Planting                         | 0                     | 0                     | 331,047               | 0                     | 0                     | 331,047                                     |
| Replace Complete Irrigation System       | 253,803               | 0                     | 0                     | 0                     | 0                     | 253,803                                     |
| Replace Pathway Lighting                 | 16,141                | 0                     | 0                     | 0                     | 0                     | 16,141                                      |
| <b>Total by Fiscal Year</b>              | <b>\$277,131</b>      | <b>\$136,186</b>      | <b>\$331,317</b>      | <b>\$6,210</b>        | <b>\$625</b>          | <b>\$751,469</b>                            |

| <b>ZONE 7:</b>               | <b>FY 2018/19</b> |
|------------------------------|-------------------|
| Inspection/Treatment Reserve | \$6,800           |
| Special Pruning              | 0                 |
| Beetle Traps                 | 500               |
| Incidental/Misc. Expenses    | 250               |
| Administration               | 150               |
| County Fees                  | 102               |
| <b>Subtotal</b>              | <b>\$7,802</b>    |
| City Contribution            | (3,902)           |
| <b>Total Zone 7</b>          | <b>\$3,900</b>    |

| <b>Zone 7 Fund Balance:</b>                     |              |
|---|--------------|
| Estimated Zone 7 Fund Balance as of 6/30/2018   | \$114,376.14 |
| FY 2018/19 Budgeted Reserve Collection(Use)     | 0            |
| Anticipated Ending Fund Balance as of 6/30/2019 | \$114,376.14 |

| <b>ZONE 8:</b>                                    | <b>FY 2018/19</b> |
|---|-------------------|
| Annual Maintenance                                | \$6,400           |
| Landscaping Capital Improvements                  | 0                 |
| Tree Trimming <sup>(1)</sup>                      | 13,400            |
| Irrigation – Water                                | 3,727             |
| Irrigation – Electrical                           | 366               |
| Litter and Graffiti Removal and Sidewalk Cleaning | 39,010            |
| Public Litter Can Management                      | 8,000             |
| Sidewalk Washing                                  | 10,000            |
| Accounting, Engineering & Admin Costs             | 7,039             |
| <b>Subtotal</b>                                   | <b>\$87,942</b>   |
| General Benefit Contribution                      | (2,876)           |
| Contingencies and Reserves                        | (13,382)          |
| <b>Total Zone 8</b>                               | <b>\$71,684</b>   |

(1) Tree Trimming is budgeted to occur every 3 years. The first scheduled tree trimming will occur in Fiscal Year 2018/19.

| <b>Zone 8 Fund Balance:</b>                     |             |
|---|-------------|
| Estimated Zone 8 Fund Balance as of 6/30/2018   | \$50,126.72 |
| FY 2018/19 Budgeted Reserve Collection(Use)     | (13,382.00) |
| Anticipated Ending Fund Balance as of 6/30/2019 | \$36,744.72 |

|                              |                    |
|------------------------------|--------------------|
| <b>TOTAL ASSESSMENT LEVY</b> | <b>\$1,505,269</b> |
|------------------------------|--------------------|

## 4. ASSESSMENTS

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The Fiscal Year 2018/19 assessments are apportioned to each parcel as shown on the latest equalized roll at the County of Alameda (the “County”) Assessor’s office and referenced in Section 6 of this Report. The description of each lot or parcel is part of the records of the County Assessor and such records are, by reference, made part of this Report.

### Method of Assessment

Pursuant to the Act, all parcels that have special benefit conferred upon them as a result of the maintenance of operations of improvements shall be identified and the proportionate special benefit derived by each identified parcel shall be determined in relationship to the entire costs of the maintenance and operation of the improvements. Only parcels that receive direct special benefit are assessed, and each parcel is assessed in proportion to the estimated benefit received.

#### Zones 1 and 4

Each of the subdivided units within Zones 1 through 4 is deemed to receive special benefit from the improvements. In order to determine the annual assessment rate for each unit, the frontage value is added to the acreage value for each unit.

$$\text{Frontage Value} + \text{Acreage Value} = \text{Annual Assessment per Unit}$$

The frontage value is calculated by multiplying the frontage rate by the frontage number of each unit. The acreage value is calculated by multiplying the acreage rate by the acreage number of each unit.

$$\text{Frontage Rate} \times \text{Frontage Number of Each Unit} = \text{Frontage Value}$$

$$\text{Acreage Rate} \times \text{Acreage Number of Each Unit} = \text{Acreage Value}$$

The frontage rate is calculated by dividing the total annual cost of maintenance and administration for the Zone, by the total number of frontage of all assessable units within such Zone, which is then multiplied by 1/2. The acreage rate is calculated by dividing the annual cost of maintenance and administration for the Zone by the total number of acres of all assessable units within such Zone, which is then multiplied by 1/2.

$$\text{Frontage Rate} = (\text{Total Annual Costs} / \text{Total Number of Frontage}) \times \frac{1}{2}$$

$$\text{Acreage Rate} = (\text{Total Annual Costs} / \text{Total Acreage}) \times \frac{1}{2}$$

#### Zone 5

Each of the subdivided units within Zone 5 is deemed to receive special benefit from the improvements. In order to determine the annual assessment rate for each acre, the total estimated annual cost of maintenance and administration for Zone 5 is divided by the total number of acres of all assessable units within the Zone.

Total Annual Costs / Total Acreage = Annual Assessment Rate per Acre

$$\$930,723.28 / 268.43 = \$3,467.28 \text{ per Acre}$$

The annual assessment for each unit is calculated by multiplying the Annual Assessment Rate per Acre by the number of acres for each parcel.

The maximum assessment for Zone 5 is subject to an annual adjustment, in which the maximum assessment is increased by the percentage change in the U.S. Department of Labor, Bureau of Labor Statistics (BLS) Consumer Price Index for all Urban Consumers (CPI-U): San Francisco-Oakland-Hayward for February of each fiscal year. In January 2018, BLS introduced a new geographic area sample for the CPI. As part of the new sample, the index for this area was renamed from San Francisco-Oakland-San Jose to San Francisco-Oakland-Hayward. The metropolitan area is comprised of Alameda, Contra Costa, Marin, San Francisco, San Mateo Counties in the State of California. This CPI will be used going forward.

The percentage increase that will be applied to the maximum assessment for Fiscal Year 2018/19 is 3.56% over the prior fiscal year assessment.

#### **Zone 6**

Each of the subdivided units within Zone 6 is deemed to receive special benefit from the improvements. In order to determine the annual assessment rate for each acre, the total estimated annual cost of maintenance and administration for Zone 6 is divided by the total number of acres of all assessable units within the zone.

Total Annual Costs / Total Acreage = Annual Assessment Rate per Acre

$$\$433,848.92 / 357.315 = \$1,214.19 \text{ per Acre}$$

The annual assessment for each unit is calculated by multiplying the Annual Assessment Rate per Acre by the number of acres for each parcel.

The maximum assessment for Zone 6 is subject to an annual adjustment, in which the maximum assessment shall be increased by the percentage change in the U.S. Department of Labor, Bureau of Labor Statistics Consumer Price Index for all Urban Consumers (CPI-U): San Francisco-Oakland-Hayward for February of each fiscal year. In January 2018, BLS introduced a new geographic area sample for the CPI. As part of the new sample, the index for this area was renamed from San Francisco-Oakland-San Jose to San Francisco-Oakland-Hayward. The metropolitan area is comprised of Alameda, Contra Costa, Marin, San Francisco, San Mateo Counties in the State of California. This CPI will be used going forward.

The percentage increase that will be applied to the maximum assessment for Fiscal Year 2018/19 is 3.56% over the prior fiscal year assessment.

#### **Zone 7**

Each of the subdivided units within Zone 7 is deemed to receive special benefit from the improvements. The maximum assessment rate for each unit within Zone 7 is \$150.00 per unit. For Fiscal Year 2018/19 the annual assessment rate for each unit within Zone 7 is \$100.00 per unit. To determine the annual assessment rate for each unit, the total annual cost of maintenance and administration is divided by the total number of units within the Zone.

Total Annual Costs / Total Number of Units = Annual Assessment Rate per Unit

\$3,900.00 / 39 = \$100.00 per Unit

### **Zone 8**

For detailed information on Zone 8, please see Appendix A.

## 5. ASSESSMENT DIAGRAM

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An Assessment Diagram for the District has been submitted to the City Clerk in the format required under the provision of the Act. The lines and dimensions shown on maps of the County Assessor of the County of Alameda for the current year are incorporated by reference herein and made part of this Report.

## 6. ASSESSMENT ROLL

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Parcel Identification, for each lot or parcel within the District, shall be the parcel as shown on the Alameda County Assessor's map for the year in which this Report is prepared.

A listing of parcels assessed within the District for Fiscal Year 2018/19, along with the assessment amounts, is on file in the office of the City Clerk. Any parcel number for the current fiscal year, a corrected parcel number, and/or new parcel numbers will be identified and resubmitted to the County Auditor/Controller. The assessment amount to be levied and collected for the resubmitted parcel(s) shall be based on the method of apportionment and assessment rate approved in this Report. Therefore, if a single parcel has changed to multiple parcels, the assessment amounts applied to each of the new parcels shall be recalculated and applied according to the approved method of apportionment and assessment rate rather than a proportionate share of the original assessment.

Non-assessable lots or parcels include areas of public streets and other roadways (typically not assigned an APN by the County), dedicated public easements, open space areas and rights-of-way including public greenbelts and parkways, utility rights-of-way, common areas, landlocked parcels, small parcels vacated by the County, bifurcated lots and any other property that cannot be developed or has specific development restrictions. These types of parcels are considered to receive little or no benefit from the improvements and are therefore, exempted from assessment.

## 7. APPENDICES

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## APPENDIX A

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The following is the Engineer's Report for Zone 8, which is included in this Report as Appendix A.



# APPENDIX A-1. PLANS AND SPECIFICATIONS

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The Zone will provide for the ongoing cleaning, maintenance, safety, beautification, and management activities all located within the boundaries of the Zone.

## Description of the Boundaries

Zone 8 (Webster Street) of the Island City Landscaping and Lighting Maintenance District No. 84-2 was previously known as Zones 2 and 3 and is located in the City of Alameda in the area generally located along Webster Street south of Atlantic Avenue and north of Central Avenue.

## Description of the Improvements and Services

The improvements provided within the Zone include, but are not limited to, the operating, maintaining, and servicing of all public landscaping improvements, consisting of trees, medians, refuse containers, sidewalks, plant materials, pathways, irrigation systems, lighting systems, and associated appurtenant facilities. Services include, but are not limited to, personnel, materials, contracting services, electrical energy, water required for all necessary maintenance, replacement, repair and administration, required to keep the above-mentioned improvements in a healthy, vigorous and satisfactory condition.

Additionally, the City plans to implement a comprehensive program that aims to ensure owner, merchant, resident, and visitor safety while providing for the maximum possible cleanliness of sidewalks, curbs, fixtures, landscaping, and buildings throughout the Zone's boundaries. Through the utilization of managed services, the Maintenance and Cleaning program will strive for a safe, clean, and litter-free area that is absent of graffiti or other signs of decay. The goal is for property owners, merchants and residents alike to maintain a sense of pride in the Webster Zone areas. Cleanliness is crucial to the establishment and growth of an aesthetically pleasing, safe, and vibrant community.

The Maintenance and Cleaning Program includes regular sidewalk sweeping, alley cleaning, refuse removal, regularly scheduled steam cleanings, pressure washing, graffiti removal, tree pruning and watering, tree well weeding, as well as other related activities.

A team of maintenance workers will carry out the following tasks:

### Cleaning and Maintenance

#### *Daily:*

Removal of litter and trash from sidewalks and street furniture including recycling and disposal at proper facilities.

Monitor public litter cans and remove excess waste from cans to prevent overflowing.

Sweep sidewalks with sweeping machine.

Removal of graffiti from public property. Reporting of graffiti to private property owners.

Removal of illegal signage.

Monitor maintenance of landscaping and report any problems to the City.

Weed tree wells and sidewalks.

Ensure staff is visible and present on the street, especially for visitors and business association members.

*Weekly (and/or as needed):*

Clean corners, steps, and drains at amenity plazas and bus stops.

Sweep bus stops; wipe down street furniture and news racks.

Trim Sidewalk Trees.

Power Washing and Steam Cleaning of sidewalks and alleys. Spot power washing as needed to removes grime, gum, gum stains, and discoloration from the sidewalks and public litter cans.

## **Overhead**

In addition to the hard costs of maintaining the improvements mentioned above, the City will incur costs for staff time and expenses related to the management and maintenance of the improvements within the Zone. Staff time includes oversight and coordination of both City and contractor provided services, annual tax roll preparation, and addressing property owner questions and concerns. These activities are directly related to the improvements, and without them, the improvements could not be efficiently completed or properly maintained on an ongoing basis.

## APPENDIX A-2. ESTIMATE OF COSTS

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The estimated costs of installation, implementation and maintenance of the improvements, services and activities as described in Section A-3 are outlined below. Each year, as part of the assessment levy calculation process, the costs and expenses are reviewed and the annual costs are projected for the following fiscal year.

### 1. Zone 8 (Webster Street) Estimated Cost Budget

The estimated cost budget for the Fiscal Year 2018/19 for the installation, implementation and maintenance of the improvements, services and activities is as follows:

| Description                                       | 2018/19<br>Maximum Budget |
|---|---------------------------|
| Annual Maintenance                                | \$6,400                   |
| Landscaping Capital Improvements                  | 0                         |
| Tree Trimming                                     | 13,400                    |
| Irrigation – Water                                | 3,727                     |
| Irrigation – Electric                             | 366                       |
| Litter and Graffiti Removal and Sidewalk Cleaning | 39,010                    |
| Public Litter Can Management                      | 8,000                     |
| Sidewalks Pressure Washing                        | 10,000                    |
| Accounting, Engineering & Admin Costs             | 7,039                     |
| Contingencies and Reserves                        | (13,382)                  |
| <b>Total Estimated Cost Budget</b>                | <b>\$74,560</b>           |

The cost estimate for the 2018/19 will be funded as follows:

| <b>Description of Revenue Source</b> | <b>2018/19 Maximum Revenue Amount</b> |
|--------------------------------------|---------------------------------------|
| Assessment Revenue                   | \$71,684                              |
| General Benefit Contribution         | 2,876                                 |
| Reserve Fund Contribution            | 13,382                                |
| <b>Total Annual Revenue</b>          | <b>\$87,942</b>                       |

The Maximum and Actual Assessment per Benefit Point is as follows:

| <b>Description of Assessment Amount</b> | <b>2018/19 Maximum Revenue Amount<sup>(1)</sup></b> |
|---|---|
| Total Estimated Cost Budget             | \$87,942  |
| General Benefit Contribution            | (2,876)   |
| Reserve Fund Contribution               | (13,382)  |
| <b>Total Actual Assessment</b>          | <b>\$71,684</b>                                     |
| Total Benefit Points                    | <b>13,838.58</b>                                    |
| Maximum Assessment Per Benefit Point    | <b>\$5.18</b>                                       |
| Annual Percent Increase                 | <b>7.00%</b>  |

(1) Actual total amounts may vary slightly due to rounding.

## APPENDIX A-3. SPECIAL AND GENERAL BENEFIT

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The improvements proposed in Section A-3 are expected to confer certain special benefits to parcels within the Zone. The special benefits are described below.

### 1. Introduction

Pursuant to Article XIID, all parcels that receive a special benefit conferred upon them as a result of the installation, implementation and maintenance of the improvements, services and activities shall be identified, and the proportionate special benefit derived by each identified parcel shall be determined in relationship to the entire costs of the installation, implementation and maintenance of the improvements, services and activities.

Article XIID, Section 4(a) of the California Constitution limits the amount of any assessment to the proportional special benefit conferred on the property. Proposition 218 requires that the City separate the general benefit from special benefit, so that only special benefit may be assessed to properties within the Zone. Furthermore, Article XIID also provides that publicly owned properties must be assessed unless there is clear and convincing evidence that those properties receive no special benefit from the assessment.

### 2. Identification of Benefit

The Webster Street Pedestrian District is considered a high-priority in the City's Pedestrian Plan, representing their importance to the community as an area of pedestrian needs. The area is designated as pedestrian districts/corridors due in part to their mix of land uses that encourage walking (Pedestrian Plan, 2009). In addition to providing a basic transportation route, sidewalks and pathways that are kept clean and free of litter and graffiti create appealing public spaces that reflect community pride and invite people to walk.

Landscaping was installed along the roadways and sidewalks within the Zone in order to enhance the overall visual appearance for adjacent parcels. According to City staff, this includes ground cover, turf and mulch. Trees and shrubs were included as part of the landscaping as well as sprinkler, irrigation and drainage systems. In addition, aesthetically pleasing landscaping welcomes users to walkways, and street and shade tree canopies encourages use even during the hottest times of the year. According to the City's Master Street Tree Plan (2009), street trees are one of the key factors making Alameda a desirable place to shop, work, visit, and live.

The ongoing maintenance, servicing and operation of the Zone improvements, services, and activities will provide benefits to both those properties within the Zone boundaries and to the community as a whole. The benefit conferred to property within the Zone can be grouped into three primary benefit categories; aesthetic benefit, safety benefit and economic activity benefit. The three Zone benefit categories are further expanded upon in each section below.

#### **Aesthetic Benefit**

The aesthetic benefit relates to the increase in the overall aesthetics as a result of the ongoing maintenance, servicing and operation of the improvements, services and activities provided to the Zone.

The sidewalk services, trash services, graffiti abatement, and beautification activities will enhance the overall image and desirability of the properties within the Zone. The following aesthetic benefits will be provided as a result of the Zone's improvements, services and activities:

- Maintained sidewalks will enhance the identity of the area, which will lead to a stronger and healthier corridor. The overall appeal of the District is enhanced when improvements are in place and kept in a healthy and satisfactory condition. Conversely, appeal decreases when improvements are not well-maintained, are unsafe, or destroyed by the elements or vandalism.
- Street landscaping improvements improve the "livability", commercial activity, appearance and desirability for properties within the Zone. Regular maintenance ensures that the improvements do not reach a state of deterioration or disrepair so as to be materially detrimental to properties adjacent to or in close proximity to the improvements within the Zone.
- Litter removal and graffiti abatement are important for the aesthetics and preservation of community property and the well-being of the public.
- Uniform and well-maintained improvements, services and activities will create cohesion throughout the Zone. This cohesion will enhance the retail and residential experience as well as encourage maximum use of the area. A uniform maintenance management program will allow for consistent and reliable maintenance throughout the Zone's boundaries.
- Upgraded sidewalk amenities and other improvements, services and activities will enhance the appearance, desirability and "livability" of the property directly fronting the improvements provided throughout the District.

As a result of the Aesthetic benefit conferred by the continued maintenance of the improvements, services and activities, the overall "livability" of the Zone will increase. "Livability" encompasses several qualities and characteristics that are unique to a specific area. The Victoria Transport Policy Institute (VTPI, 2011) expands on the concept of "livability" and the various benefits associated with that designation. The Victoria Transport Policy Institute indicates that the "livability" of an area increases property desirability and business activity. "Livability" is largely affected by conditions in the public realm, places where people naturally interact with each other and their community, including streets, parks, transportation terminals and other public facilities. "Livability" also refers to the environmental and social quality of an area as perceived by employees, customers and visitors. This includes local environmental conditions, the quality of social interactions, opportunities for recreation and entertainment, aesthetics, and existence of unique cultural and environmental resources.

#### **Safety Benefit**

The maintained improvements within the Zone will provide an increased level of safety to the property, businesses, residents, and visitors to the Zone.

The following safety benefits will be provided as a result of the Zone's improvements, services and activities:

- The improvements, services and activities will provide for clear and safe access to and from properties, as well as provide for safe pedestrian passage throughout the Zone.
- Well-maintained sidewalks, free of trash, provide a separation between vehicle and pedestrian as well as property and pedestrian, which provides a safety benefit for both property and pedestrian. In the City of Alameda between 2002 and 2007 there were an average of 40 pedestrian-involved motor vehicle collisions per year and pedestrian-involved motor vehicle collisions equaled five percent of total collisions (Pedestrian Plan, 2009). The U.S. Department of Transportation Federal Highway Administration (FHWA, n.d.) notes that roadways without sidewalks are more than twice as likely to have pedestrian involved accidents compared to sites with sidewalks on both sides of the street.
- Regular maintenance to the District improvements ensures that the improvements do not reach a state of deterioration or disrepair so as to be materially detrimental to properties adjacent to or in close proximity to the sidewalks.
- Safety for pedestrians involves not only a degree of protection from vehicular accidents, but also from criminal activity. Well monitored areas mitigate crime, especially vandalism, and enhance pedestrian safety.
- Landscape improvements not only contribute to a decrease in crash rates 46 percent across urban arterial and highway sites, there is also less graffiti, vandalism, and littering in outdoor spaces with natural landscapes than in comparable plant-less spaces (Wolf, 2010).
- According to the National Crime Prevention Council (NCPC, 2009) a climate of safety in a community can be created by designing a physical environment that positively influences human behavior and prevents crime. Picking up trash and the removal of graffiti deters crime and promotes more vibrant communities.

#### **Economic Activity Benefit**

The economic activity benefit relates to the increase in the Zone's economic activity and future property development potential as a result of the Zone's improvements, services and activities. The economic activity for property within the Zone can best be described as the ability for the property within the Zone to develop, redevelop and operate at the property's highest and best use. Properties within the Zone will receive the following economic activity benefits as a result of the Zone's improvements, services and activities:

- The Zone will provide a cleaner more inviting environment to residents and consumers which will attract, retain, and expand the retail and business climate throughout the Zone.
- The effort will reduce vacancy rates and increase lease rates and utilization of property within the Zone.
- Well-maintained and safe Zone areas will encourage an increase in the overall pedestrian activity. The Zone's area will become more pedestrian friendly, thus improving the retail environment by encouraging individuals to shop, dine, and stay within the Zone boundaries.
- Well maintained street landscape improvements not only make adjacent properties appear more stable and prosperous but can spur investment in the property. According to the

FHWA, landscaped sidewalks create an inviting place for customers to shop and do business (FHWA, 2001).

Well-maintained and safe sidewalks and public right-of-ways not only make adjacent properties appear more stable and prosperous, but can spur investment in the property. The National Complete Streets Coalition (NCSC, n.d.) notes that street design that is inclusive of all modes of transportation, where appropriate, not only improves conditions for existing businesses, but also is a proven method for revitalizing an area and attracting new development. Washington, DC's Barracks Row was experiencing a steady decline of commercial activity due to uninviting sidewalks, lack of streetlights, and speeding traffic. After many design improvements, which included new patterned sidewalks, more efficient public parking, and new traffic signals, Barrack's Row attracted 44 new businesses and 200 new jobs. Economic activity on this three-quarter mile strip (measured by sales, employees, and number of pedestrians) has more than tripled since the inception of the project.

### **3. Separation of General Benefit**

Section 4 of Article XIID of the California Constitution provides that once a local agency which proposes to impose assessments on property has identified those parcels that will have special benefits conferred upon them and upon which an assessment will be imposed, the local agency must next "separate the general benefits from the special benefits conferred," and only the special benefits can be included in the amount of the assessments imposed.

General benefit is an overall and similar benefit to the public at large resulting from the installation, implementation and maintenance of the Zone's improvements, services and activities to be provided by the assessments levied. The installation, implementation and maintenance of assessment funded Zone improvements, services and activities provided by the Zone will be located within the Zone boundaries only. There will be no installation, implementation, and maintenance of assessment funded improvements, services, and activities located outside of the Zone boundaries.

The ongoing installation, implementation and maintenance of Zone improvements, services and activities will provide aesthetic, safety and economic activity benefits to the property within the Zone. However, it is recognized that the ongoing installation, implementation and maintenance of Zone improvements, services and activities will also provide a level of benefit to some property and businesses within proximity to the Zone, as well as visitors and individuals passing through the Zone. Pedestrian traffic from property within and outside of the Zone as well as individuals passing through the Zone area will be able to utilize the safe and maintained sidewalks to not only access property located within the Zone, but also to access public transportation at the bus stops within the Zone. Therefore, the general benefit created as a result of the Zone improvements, services and activities has been considered.

### **4. Quantification of General Benefit**

As a result of the maintenance and operation of the improvements, there will be a level of general benefit to people that do not live in or intend to conduct business within the Zone. In order for property within the Zone to be assessed only for that portion of special benefits received from the Zone's maintenance activities, general benefits provided by the ongoing maintenance of the improvements



needs to be quantified. The amount of general benefit that is provided from the Zone's maintenance activities cannot be funded via property owners' assessments.

There will be pedestrian traffic generated from property outside of the Zone that will utilize the maintained sidewalks in order to pass through the Zone and access property located outside of the Zone boundaries. In addition to accessing property located outside of the Zone, there will also be a level of pedestrian activity that will utilize the maintained sidewalks for leisure and fitness activities. Pedestrians will incorporate the maintained and safe sidewalks into their leisure and fitness routines, thus making the Zone sidewalks serve as a pass-through portion of their overall route traveled. The benefit provided to property and pedestrians, as a result of the maintained sidewalks serving as a pass-through corridor, needs to be quantified.

Today, the west side of Alameda is ripe with diverse businesses from long time-established enterprises, which are expanding to a fresh new crop of retail shops, restaurants, services, and other businesses. Zone 8 which encompasses the Webster Street area is a hub of movement and enterprise, attracting locals and visitors from around the bay area and California. Alameda has a collection of traditional and diverse community events. The Webster Street area is the host to a variety of events, such as: Alameda's Earth Day Festival, Concerts at the Cove, the Mayor's 4th of July Parade, the Neptune Beach Community Celebration, Halloween on Webster and Santa on Webster. The Alameda Farmer's market is held on Webster Street every Saturday.

The primary reason persons living outside the Zone would enter the Zone would be to access the commercial or entertainment properties within the Zone. The Webster Street business district included in the Zone is one of the City's primary commercial and entertainment districts. Even those individuals looking to use public transportation for the purpose of commuting out of Alameda will likely still shop or dine within the Zone. Additionally, the presence of the improvements will act as a magnet to tourists or commuters traveling to the City who would otherwise just pass-through the areas.

While the improvements within the Zone are primarily a benefit to the properties within the Zone we must recognize the benefit received by those individuals just that may be just passing through with no intentions of utilizing the properties within the Zone. It is possible that people living in the neighborhoods around the Zone will walk into the Zone strictly for the purpose of commuting to work in a location outside the Zone.

The U.S. Census Bureau (2010) determined that there is an average of 2.45 persons per household in Alameda. The commonly accepted distance people will walk for public transportation, goods and services is one-quarter mile (Walkscore, 2014). In order to determine the total number of persons who are within close proximity to the improvements, a quarter-mile radius of the Zone's boundaries is used.

| <b>Zone</b>             | <b>Number of Households<sup>(1)</sup></b> | <b>Neighborhood Population</b> |
|-------------------------|---|--------------------------------|
| Zone 8 (Webster Street) | 1,357                                     | 3,325                          |

(1) Based upon land use and units from the 2013 Alameda County Secured Property Roll.

According to the City's Pedestrian Plan, approximately 16 percent of Alameda's employed residents utilize public transit to commute to work (Pedestrian Plan, 2009). In order to determine the number of

persons that will enter the Zone walking with a purpose to access public transit for their commute to work in a location outside the Zone, the employed population of residents must be determined. If it is assumed that at least 1 person per household will be employed accounting for small children, retired, and unemployed residents, the number of households is equal to the employed population. To find the number of persons utilizing public transit for their commute, 16 percent is applied to the employed population residing within a quarter-mile radius of the Zone boundaries

| <b>Zone</b>             | <b>Employed Population</b> | <b>Population Estimated to Commute to Work</b> |
|-------------------------|----------------------------|--|
| Zone 8 (Webster Street) | 1,357                      | 217  |

After applying 16 percent to the number of employed residents within a quarter-mile of the Zone, the result is that an estimated 6.5 percent of the people residing in the areas surrounding the Zone will commute to work utilizing public transit.

| <b>Zone</b>             | <b>Neighborhood Population<sup>(1)</sup></b> | <b>Population Estimated to Commute to Work<sup>(3)</sup></b> | <b>Percent of Neighborhood Population Commuting</b> |
|-------------------------|--|--|---|
| Zone 8 (Webster Street) | 3,325  | 217  | 6.5%  |

(1) Estimate of households within a quarter-mile radius of the Zone multiplied by the 2.45 persons per household according to the 2010 U.S. Census.

(2) Estimated commuters assuming a minimum of 1 employed person per household within quarter- mile radius of the Zone.

(3) Percent of employed persons estimated to use public transit to commute to work.

It is likely that many of those people will utilize the commercial, dining and entertainment services within the Zone on the way to and from the use of public transit. However, if we use a very conservative estimate that 50 percent of those commuters will never utilize the shops, restaurants or services provided by the properties within the Zone and will only ever pass through the Zone, then we can assume 3.27 percent of the surrounding populations will receive benefit from the improvements, and is therefore considered to be general benefit.

| <b>Zone</b>             | <b>General Benefit</b> |
|-------------------------|------------------------|
| Zone 8 (Webster Street) | <b>3.27%</b>           |

As such, the general benefit portion of the improved aesthetics, increase safety, and economic activity benefits resulting from improvements within the Zone is estimated to be 3.27 percent and the special benefit is estimated to be 96.73 percent.

## 5. Apportionizing of Special Benefit

As outlined above, each of the parcels within the Zone receives a special benefit from the improvements. Each parcel that has a special benefit conferred upon it as a result of the maintenance and operation of improvements is identified and the proportionate special benefit derived by each identified parcel is determined in relationship to the entire costs of the maintenance and operation of the improvements.

The primary purpose of the improvements, services and activities within the Zone is for the benefit of the commercial properties. The Zone is first and foremost one of the City's primary business and entertainment districts. In recognition that there are other property types that receive benefit from the improvements but at a reduced level, benefit points will be assigned to each parcel based upon its primary land use. As further detailed, the following components are used to assign special benefit to each parcel:

#### **Benefit Points Assignment**

The Zone is an established, mixed-use use area that features a blend of non-residential, residential, and public property. The Zone's improvements, services and activities will be provided uniformly throughout the Zone's boundaries. These clean and safe areas create an aesthetically pleasing and safe environment for Zone properties, and those individuals utilizing Zone property, whether it is to shop, dine, live or visit. An area with a variety of non-residential activity contained within a thriving economic area will encourage individuals to stay within the area to shop, dine and take part in other commercial activities instead of seeking similar activities outside of the area.

To determine the assigned aesthetic benefit points and safety benefit points for each property land use category within the District, the special benefit population was then categorized as follows:

| <b>Property Land Use</b> |
|--------------------------|
| Non-Residential Property |
| Residential Property     |
| Public Property          |

Utilizing the Non-Residential Property land use as the base land use category, an aesthetic benefit point and a safety benefit point of 1.00 is assigned. The Zone's activities will primarily benefit the non-residential property within the Zone, but there are some benefits provided to public and residential properties within the Zone. To account for the reduced benefit public and residential properties are assigned 0.25 aesthetic and safety benefit points. The aesthetic benefit points and safety benefit points are assigned as follows:

| <b>Property Land Use</b> | <b>Aesthetic Benefit Points</b> | <b>Safety Benefit Points</b> | <b>Economic Activity Benefit Points</b> |
|--------------------------|---------------------------------|------------------------------|---|
| Non-Residential Property | 1.00                            | 1.00                         | 1.00                                    |
| Residential Property     | 0.25                            | 0.25                         | 0.25                                    |
| Public Property          | 0.25                            | 0.25                         | 0.25                                    |

### **Parcel Factors**

The method of apportioning benefit to parcels within the Zone's reflects the proportional special benefit assigned to each property from the Zone's improvements, services and activities based upon the various property characteristics for each parcel as compared to other properties within the Zone. As part of the special benefit analysis various property characteristics were analyzed including parcel size, street frontage, building size, land use, etc. Given that the special benefits provided by the Zone's improvements, services and activities focus on aesthetic benefit, safety benefit and economic activity benefit, it was determined that linear street frontage and land use are the most appropriate parcel factors. Each parcel's linear frontage along maintained streets, and land use have been used as the primary assessment variables for the calculation and assignment of parcel factors.

### **Land Use**

Properties in the Zone are assigned a land use categories, as further outline below, and may be reassigned if the property's land use changes.

**Non-Residential Property:** Non-Residential Property consists of parcels owned by a profit-making entity (rather than by a government or non-profit entity) and used for commercial purposes such as retail, office, or hotel property. Properties that have residential units but have a primary commercial use are also considered Non-Residential Property.

**Public Property:** Public Property consists of parcels owned by a state, regional, or city government entity; for example, police or fire stations, schools, libraries and government-owned office buildings.

Non-Profit properties such as churches have a similar use and traffic pattern as Public Property and therefore have equivalent benefit factors to property classified as Public.

**Residential Property:** Residential Property consists of single family dwellings, duplexes, triplexes, condominiums, and apartment units used exclusively for residential purposes.

By adjusting the assigned special benefit points assigned for each property land use category by parcel factors, a more complete picture of the proportional special benefits received by each parcel within the Zone's is presented. Therefore, benefit factors were calculated and assigned for each parcel in the Zone according to the formulas below:

### **Linear Factor**

Given the linear nature of the improvements, services and activities, each parcel within the Zone is assigned a linear factor that is equal to the parcel's linear street frontage along the streets that receive ongoing Zone improvements, services and activities. The linear frontage for corner lots will be determined by adding the frontage along the streets that receive ongoing Zone improvements, services and activities.

|               |   |   |
|---------------|---|---|
| Linear Factor | = | Parcel's Assigned<br>Linear Street Frontage |
|---------------|---|---|

### **Parcel's Land Use Special Benefit Points Calculation**

The formula below shows the parcel's land use special benefit points calculation for each parcel within the Zone:

|  |   |   |   |                                      |   |  |
|--|---|---|---|--------------------------------------|---|--|
| Parcel's Land<br>Use Special<br>Benefit Points | = | Parcel's<br>Aesthetic Benefit<br>Points | + | Parcel's<br>Safety<br>Benefit Points | + | Parcel's<br>Economic<br>Benefit Points |
|--|---|---|---|--------------------------------------|---|--|

### **Parcel's Total Special Benefit Points Calculation**

The formula below shows the parcel's total special benefit points calculation for each parcel within the Zone:

|  |   |               |   |   |
|--|---|---------------|---|---|
| Parcel's Total<br>Special Benefit Points | = | Linear Factor | x | Parcel's Land Use Special<br>Benefit Points |
|--|---|---------------|---|---|

### **Data Considerations and Parcel Changes**

The use of the latest Assessor's Secured Roll and Assessor's Parcel Map information has been and shall be used in the future as the basis in determining each parcel's land use and linear street frontage unless better data was or is available to the City. In addition, if any parcel within the District is determined by the Assessment Roll to be an invalid parcel number, the land use and linear street frontage of the subsequent valid parcels shall serve as the basis in assigning special benefit points.

### **Total Special Benefit Points**

The total special benefit points for the Zone at this time are included in the table below.

| <b>Zone</b>             | <b>Special Benefit Points</b> |
|-------------------------|-------------------------------|
| Zone 8 (Webster Street) | <b>13,838.58</b>              |

## APPENDIX A-4. METHOD OF ASSESSMENT

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### 1. Assessment Budget

In order to assess the parcels within the Zone for the special benefits received from the ongoing Zone improvements, services and activities, the general and special benefits must be separated. As previously quantified in Section 5.4 of this Engineer's Report, the general benefit received from the Zone improvements, services and activities is 3.27%. Accordingly, 96.73% of the benefits from the Zone improvements, services and activities are considered to provide special benefits to the properties within the Zone and thus could be subject to assessment therein.

Below is the calculation for the assessments utilizing the proposed Fiscal Year 2018/19 cost estimate.

#### Zone 8 (Webster Street)

| Description of Assessment Amount   | Amount           |
|--|------------------|
| Total Maximum District Improvements, Services and Activities Cost Estimate | \$87,942         |
| Less: General Benefit Contribution   | (2,876)          |
| Less: Funds available from Reserves  | (13,382)         |
| <b>Total 2018/19 Maximum Assessment Revenue</b>                            | <b>\$71,684</b>  |
| Total Zone 8 (Webster Street) Benefit Points                               | <b>13,838.58</b> |
| 2018/19 Maximum Allowable Assessment Per Benefit Point                     | <b>\$5.18</b>    |

#### **Maximum Assessment Rate per Special Benefit Point**

The maximum assessment rate per special benefit point is calculated by dividing the total cost estimate by the total special benefit points assigned. The following formula provides the maximum assessment rate per special benefit point calculation:

$$\text{Total 2018/19 Cost Estimate} / \text{Total Special Benefit Points} = \\ \text{Maximum Assessment Rate per Special Benefit Point}$$

$$\$71,683.84 / 13,838.58 = \$5.18$$

Each parcel's actual assessment is determined by multiplying the actual assessment rate by the parcels total special benefit points. If the total special benefit points change in future years, the maximum allowable annual assessment rate will not be recalculated. The maximum allowable annual assessment rate, plus the annual cost of living inflator, will remain fixed. The actual annual assessment rate will be calculated by dividing the fiscal year's net cost estimate to be assessed by the fiscal year's total special benefit points, not to exceed the maximum allowable annual assessment rate for that fiscal year.

The individual assessments are shown on the assessment roll in Section A-6 of this Engineer's Report.

## 2. Method of Assessment Spread

The method of assessment is based upon a formula that assigns the special benefits to each parcel, with special benefit points being adjusted by the parcel's linear frontage. The formula bellows provides a summary of the annual assessment calculation for each parcel in the Zone.

|   |   |   |   |                         |
|---|---|---|---|-------------------------|
| (A) Parcel's<br>Total Special<br>Benefit Points | = | (B) Parcel's Land Use<br>Special Benefit Points | x | (C)<br>Linear<br>Factor |
|---|---|---|---|-------------------------|

|   |   |   |   |                                      |   |  |
|---|---|---|---|--------------------------------------|---|--|
| (B) Parcel's<br>Land Use<br>Special<br>Benefit Points | = | Parcel's<br>Aesthetic Benefit<br>Points | + | Parcel's<br>Safety<br>Benefit Points | + | Parcel's<br>Economic<br>Benefit Points |
|---|---|---|---|--------------------------------------|---|--|

|                         |   |                        |
|-------------------------|---|------------------------|
| (C)<br>Linear<br>Factor | = | Linear Street Frontage |
|-------------------------|---|------------------------|

### 3. Applying the Method of Assessment Spread

The maximum assessment for each parcel in the Zone has been calculated by the following procedure:

**Step 1:** Assign each parcel its appropriate land use category based on the most recent Alameda County Assessor's Secured Roll data.

**Step 2:** Determine each parcel's appropriate special benefit points based on land use. The special benefit points are shown in the following table:

| Property Land Use        | Aesthetic Benefit Points | Safety Benefit Points | Economic Activity Benefit Points |
|--------------------------|--------------------------|-----------------------|----------------------------------|
| Non-Residential Property | 1.00                     | 1.00                  | 1.00                             |
| Residential Property     | 0.25                     | 0.25                  | 0.25                             |
| Public Property          | 0.25                     | 0.25                  | 0.25                             |

**Step 3:** Sum the aesthetic benefit points, safety benefit points and economic benefit points for each parcel.

**Step 4:** Determine the appropriate linear factor based on the parcel's location to the improvements. The unit of measurement for each linear factor is shown in the following table:

|               |   |   |
|---------------|---|---|
| Linear Factor | = | Parcel's Assigned<br>Linear Street Frontage |
|---------------|---|---|

**Step 5:** Multiply the total special benefit points by linear factor to compute each parcel's total special benefit points.

**Step 6:** Sum the result of Step 5 for all parcels in the Zone.

**Step 7:** Separate the general benefit from the special benefit by multiplying the total Zone budget times the special benefit percentage.

**Step 8:** Divide the portion of the budget representing special benefit calculated in Step 7 by the result of Step 6 to compute the rate per special benefit point.

**Step 9:** Multiply each parcel's Total Special Benefit Points by the result of Step 8 to compute each parcel's assessment.

**Step 10:** In future years the rate per special benefit point will be adjusted by inflation. The maximum assessment amount is subject to an annual adjustment, in which the maximum assessment shall be increased by the percentage change in the February to February U.S. Department of Labor, Bureau of Labor Statistics Consumer Price Index for all Urban Consumers (CPI-U): San Francisco-Oakland-San Jose each fiscal year.



#### 4. Cost of Living Inflator

For Fiscal Year 2018/19, the maximum annual assessment rate will increase according to the following table:

| Description                          | 2018/19 Increase |
|--------------------------------------|------------------|
| Annual Percent Increase              | 7.00%            |
| Maximum Assessment Per Benefit Point | \$5.18           |
| Total Actual Assessment              | \$71,683.84      |

Each fiscal year beginning July 1, 2019, the maximum allowable assessment amount may be increased by the annual percentage change in the February to February Consumer Price Index for all Urban Consumers, for the San Francisco-Oakland-Hayward area ("CPI") each fiscal year. In January 2018, BLS introduced a new geographic area sample for the Consumer Price Index (CPI). As part of the new sample, the index for this area was renamed from San Francisco-Oakland-San Jose to San Francisco-Oakland-Hayward, CA. The metropolitan area is comprised of Alameda, Contra Costa, Marin, San Francisco, San Mateo Counties in the State of California. This CPI will be used going forward. If for any reason the percentage change is negative the maximum allowable assessment would not be decreased by reason of such negative percentage change and would remain at the amount as computed on the previous fiscal year regardless of any CPI adjustment. The annual assessment cannot exceed the actual costs to operate the Zone in any given year.

## APPENDIX A-5. ASSESSMENT DIAGRAM

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An Assessment Diagram for the Zone has been previously submitted to the City Clerk in the format required under the provisions of the Code. The lines and dimensions of each lot or parcel within the Zone are those lines and dimensions shown on the maps of the Assessor, at the time this report was prepared, and are incorporated by reference herein and made part of this Engineer's Report.

## APPENDIX A-6. ASSESSMENT ROLL

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The assessment roll is a listing of the assessment apportioned to each lot or parcel, as shown on the last equalized roll of the Assessor. The assessment roll for Fiscal Year 2018/19 for the Zone is on file in the office of the City Clerk.

## APPENDIX A-7. REFERENCES

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