

File No. 110772

Committee Item No. 3
Board Item No. _____

COMMITTEE/BOARD OF SUPERVISORS
AGENDA PACKET CONTENTS LIST

Committee: Rules Date 7/28/11

Board of Supervisors Meeting Date _____

Cmte Board

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| <input type="checkbox"/> | <input type="checkbox"/> | Motion |
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| <input type="checkbox"/> | <input type="checkbox"/> | Legislative Digest |
| <input type="checkbox"/> | <input type="checkbox"/> | Budget Analyst Report |
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| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Department/Agency Cover Letter and/or Report |
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| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <u>W. Brial CBD Mgmt. Plan</u> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <u>W. Brial CBD Engineers Report</u> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <u>* Petitions</u> |
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Completed by: Linda Wong Date 7/25/11
Completed by: _____ Date _____

An asterisked item represents the cover sheet to a document that exceeds 25 pages. The complete document is in the file.

1 [Resolution of Intention - West Portal Community Benefit District]

2
3 **Resolution declaring the intention of the Board of Supervisors to establish a property-**
4 **based business improvement district (community benefit district) to be known as the**
5 **“West Portal Community Benefit District” and to levy a multi-year assessment on**
6 **identified parcels in the district; approving the management district plan and**
7 **engineer's report and proposed boundaries map for the district; ordering and setting**
8 **a time and place for a public hearing thereon; approving the form of the Notice of**
9 **Public Hearing and Assessment Ballots; and directing the Clerk of the Board of**
10 **Supervisors to give notice of the public hearing and balloting as required by law.**

11
12 WHEREAS, The Property and Business Improvement District Law of 1994, Part 7 of
13 Division 18 of the California Streets and Highways Code, commencing with Section 36600
14 (the "Law"), authorizes cities to establish property and business improvement districts within
15 business districts to promote the economic revitalization and physical maintenance of such
16 business districts; and

17 WHEREAS, Section 36603 of the Law recognizes the authority of Charter cities to
18 adopt ordinances providing for different methods of levying assessments for similar or
19 additional purposes from those set forth in the Law; and

20 WHEREAS, Article 15 of the San Francisco Business and Tax Regulation Code
21 ("Article 15") augments certain procedural and substantive requirements relating to the
22 formation of property and business improvement districts and the assessments on real
23 property or businesses within such districts; and

24 WHEREAS, The Law and Article 15 authorize the City to levy and collect assessments
25 on real property within such districts for the purpose of providing improvements and promoting

1 activities and property-related services that specially benefit identified parcels of real property
2 located within such districts; and

3 WHEREAS, Article XIID of the California Constitution and Section 53753 of the
4 California Government Code impose certain procedural and substantive requirements relating
5 to assessments on real property; and

6 WHEREAS, The Law and Article 15 impose additional procedural and substantive
7 requirements relating to assessments on real property within a proposed property and
8 business improvement district, also known as a community benefit district ("CBD"); and

9 WHEREAS, The Board of Supervisors finds that the property-related services, activities
10 and improvements to be funded with assessments on real property within the proposed district
11 will confer substantial special benefits on the assessed properties over and above the general
12 benefits to the public at large from such services, activities and improvements; and

13 WHEREAS, The property owners who will pay more than 30 percent of the total
14 amount of assessments on properties within the proposed district signed and submitted to the
15 Clerk of the Board of Supervisors a petition (the "Petition") requesting that the Board of
16 Supervisors establish a property-based community benefit district to be named the "West
17 Portal Community Benefit District," and to levy assessments on properties located in the
18 proposed district to fund property-related services, activities and improvements within the
19 district; and

20 WHEREAS, A Management District Plan entitled the "West Portal Community Benefit
21 District Management District Plan" containing information about the proposed district and
22 assessments required by Section 36622 of the Law, including but not limited to maps showing
23 all identified parcels located in the district, a description of the boundaries of the district, the
24 name of the district, the amount of the proposed assessment for each identified parcel, the
25 total annual amount chargeable to the entire district, the duration of the payments, the

1 property-related services, activities and improvements to be funded by the assessments for
2 each year and the maximum cost thereof, the method and basis upon which the assessments
3 are calculated in sufficient detail to allow each property owner to calculate the amount of the
4 assessment to be levied against his or her property, a statement that no bonds will be issued,
5 the time and manner of collecting the assessments, and a list of the properties to be assessed

6 (including assessor parcel numbers), has been submitted to the Clerk of the Board of
7 Supervisors dated May 17, 2011, which is hereby declared to be a part of this Resolution as if
8 set forth fully herein; and

9 WHEREAS, A detailed engineer's report supporting the assessments within the
10 proposed district, prepared by Terrance E. Lowell, California Registered Professional
11 Engineer No. 13398 dated May 17, 2011, entitled "West Portal Community Benefit District,
12 Engineer's Report" has been submitted to the Clerk of the Board of Supervisors, which is
13 hereby declared to be a part of this Resolution as if set forth fully herein; and

14 WHEREAS, A Proposed Boundaries Map has been submitted to the Clerk of the Board
15 of Supervisors pursuant to California Streets and Highways Code §3110, which is hereby
16 declared to be a part of this Resolution as if set forth fully herein; now, therefore, be it

17 RESOLVED, That the Board of Supervisors declares as follows:

18 Section 1. Pursuant to Section 36621(a) of the Law and Article 15, the Board of
19 Supervisors declares its intention to form a property and business improvement district to be
20 designated as the "West Portal Community Benefit District" (the "District") for a period of
21 thirteen (13) years, and to levy and collect assessments against all identified parcels of real
22 property in the District for a period of thirteen (13) years, commencing with fiscal year 2011-
23 2012, subject to approval by a majority of the property owners in the District who cast
24 assessment ballots, which ballots shall be weighted according to the proportional financial
25 obligations of the affected properties. No bonds will be issued. District operations will

1 commence on or about January 1, 2012, following collection of the assessments for fiscal
2 year 2011-2012 and disbursement of the assessment proceeds to the nonprofit owners'
3 association that will administer the property-related services, activities and improvements in
4 the District pursuant to Section 36651 of the Law and a written agreement with the City.

5 Section 2. The Board of Supervisors hereby approves the Management District Plan
6 and District Assessment Engineer's Report each dated May 17, 2011, including the estimates
7 of the costs of the property-related services, activities and improvements set forth in the plan,
8 and the assessment of said costs on the properties that will specially benefit from such
9 services, activities and improvements. A copy of the Management District Plan and the
10 District Assessment Engineer's Report each dated May 17, 2011 are on file with the Clerk of
11 the Board of Supervisors in File No. 110772, which are hereby declared to be a part of this
12 Resolution as if set forth fully herein. The Clerk of the Board shall make the Management
13 District Plan, District Assessment Engineer's Report and other documents related to the
14 District and included in the record before the Board of Supervisors available to the public for
15 review during normal business hours, Monday through Friday 8:00 a.m. through 5:00 p.m.,
16 excluding legal holidays.

17 Section 3. The Board of Supervisors hereby approves the Proposed Boundaries
18 Map showing the exterior boundaries of the District, which is on file with the Clerk of the Board
19 of Supervisors in File No. 110772, which is hereby declared to be a part of this Resolution as if
20 set forth fully herein. The proposed District contains approximately 84 identified parcels in the
21 West Portal area. The exterior boundaries of the District include all parcels that front West
22 Portal Avenue between Ulloa Street and 15th Avenue; and in addition include the public
23 library, the Muni transfer station, and the parcels on both sides of Ulloa between West Portal
24 Avenue and Claremont Boulevard. The District is approximately three (3) linear blocks.

25 Reference should be made to the detailed maps and the lists of parcels identified by

1 Assessor Parcel Number that are contained in the Management District Plan, in order to
2 determine which specific parcels are included in the West Portal Community Benefit District.

3 Section 4. A public hearing on the establishment of the District, and the levy and
4 collection of assessments starting with fiscal year 2011-2012 and continuing through fiscal
5 year 2023-2024, with services and programs to be provided January 1, 2012 through
6 December 31, 2024, shall be conducted before the Board of Supervisors on September 27,
7 2011 at 3:00 p.m., or as soon thereafter as the matter may be heard, in the Board's
8 Legislative Chambers, Second Floor, City Hall, 1 Dr. Carlton B. Goodlett Place, San
9 Francisco, California, 94102. At this public hearing, the Board of Supervisors will hear public
10 testimony regarding the proposed formation of the District, assessments, boundaries of the
11 District, including testimony from all interested persons for or against establishment of the
12 District, the extent of the District, the levy of the assessments, the furnishing of specific types
13 of property-related services, improvements and activities, and other matters related to the
14 District. The Board of Supervisors may waive any irregularity in the form or content of any
15 written protest, and at the public hearing may correct minor defects in the proceedings. All
16 protests submitted by affected property owners and received prior to the conclusion of the
17 public testimony portion of the public hearing shall be tabulated to determine whether a
18 majority protest exists.

19 Section 5. The Board of Supervisors hereby approves the form of the Notice of
20 Public Hearing and Assessment Ballot which are on file with the Clerk of the Board of
21 Supervisors in File No.110772, which are hereby declared to be a part of this Resolution as if
22 set forth fully herein; and
23
24
25

1 Section 6. The proposed property-related services, improvements or activities for
2 the District include two principal programs: Maintenance and Streetscape Improvements, and
3 Economic Development. There will also be an Advocacy and Administration component.

4 A. Maintenance and Streetscape Improvements:

5 The Maintenance and Streetscape Improvements Program will provide a cleaner and
6 more aesthetically appealing environment for businesses, employees and pedestrians.

7 CBD maintenance teams will provide enhanced cleaning services, including sidewalk
8 sweeping and litter removal, power washing and scrubbing of sidewalks, removal of illegal
9 signs/posters/stickers, and graffiti removal.

10 In addition, the CBD will undertake efforts to beautify the public right-of-way
11 streetscape and provide maintenance, which may include such items as seasonal banners,
12 flower baskets, tree installation, and other beautification efforts.

13 B. Economic Development:

14 The Economic Development program will provide activities to support the growth and
15 vitality of existing businesses, attract new businesses, and enhance the image of West Portal
16 as a destination for consumer and investment revenues.

17 CBD funds will be used for market and demographic research, to identify what is
18 needed to attract future development and investment. This program will identify the types of
19 businesses and activities that are missing and needed in the West Portal business corridor. A
20 variety of options will be developed, that may include:

- 21 • Design and dissemination of investor marketing materials to assist real estate
22 brokers, developers and property owners in business recruitment efforts.
- 23 • Creation and maintenance of a database with a variety of market and real estate
24 information.

- 1 • Provision of counseling, financing referrals and business support to start locally
2 owned independent businesses.
- 3 • Provision of trouble-shooting and liaison services between property and business
4 owners and the City, in an effort to entice investment and business operations in
5 West Portal.

6 C. Advocacy and Administration:

7 The District will support a professional staff that delivers programs and advocates on
8 behalf of the District.

9 The CBD advocacy services will provide direction on policies and issues that affect the
10 central business district.

11 Administrative services will include an Executive Director, and a part-time
12 administrative assistant if needed, for the day to day operations of the CBD. The
13 administrative services budget will also include office expenses such as rent, bookkeeping,
14 annual reporting expenses, insurance, and related expenses.

15 Section 7. Within the area encompassed by the proposed District, the City currently
16 provides services at the same level provided to other similar areas of the City. It is the intent
17 of the Board of Supervisors to continue to provide the area encompassed by the District with
18 the same level of services provided to these other similar areas of the City. The
19 establishment of the District will not affect the City's policy to continue to provide the same
20 level of service to the areas encompassed by the District as it provides to other similar areas
21 of the City during the duration of the District.

22 Section 8. The annual assessment proposed to be levied and collected for the first
23 year of the District (fiscal year 2011-2012) is estimated to be \$198,000. The amount of the
24 annual assessment to be levied and collected for years two through thirteen (fiscal years
25 2012-2013 through 2023-2024) may be increased from one year to the next by a percentage

1 that does not exceed either the change in the Consumer Price Index for All Urban Consumers
2 in the San Francisco-Oakland-San Jose Consolidated Metropolitan Statistical Area, or three
3 percent (3%), whichever is less.

4 Section 9. The Clerk of the Board is directed to give notice of the public hearing as
5 provided in California Streets and Highways Code Section 36623, California Government
6 Code Section 53753, California Constitution Article XIID Section 4, San Francisco Charter
7 Section 16.112, and San Francisco Administrative Code Section 67.7-1.

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NOTICE OF PUBLIC HEARING
AND ASSESSMENT BALLOT PROCEEDING

TO: «Name»
 Assessor's Parcel No. «BlockLot»
 «Situs»
 «No»

FROM: John Arntz, Director
 Department of Elections
 City and County of San Francisco

SUBJECT: Notice of Public Hearing and Assessment Ballot Proceeding to consider the establishment of the property-based special assessment district, to be known as the "West Portal Community Benefit District"

The purpose of this notice is to provide you with information about an assessment ballot proceeding and public hearing being conducted by the Board of Supervisors, and its effect on real property that you own. This notice is being sent to you in accordance with Resolution No. _____, passed by the Board of Supervisors (a copy of which is enclosed), California Government Code Section 53753, and California Constitution Article XIID Section 4(c).

Please be advised of the following:

- The Board of Supervisors will hold a public hearing on the proposed assessment at 3:00 p.m. on _____, 2011 or as soon thereafter as the matter may be heard, in the Board's Legislative Chambers, Second Floor, City Hall, 1 Dr. Carlton B. Goodlett Place, San Francisco, California, 94102. At this hearing, the Board will hear testimony regarding the proposed assessment. The reason for the assessment is to establish the property-based business improvement district (community benefit district) to be known as the "West Portal Community Benefit District". The annual assessments would last for) 13 years, the services will be implemented through .December 31, 2024
- The proposed West Portal Community Benefit District contains approximately 84 identified parcels, located on approximately 3 linear blocks or 8 partial blocks in the West Portal neighborhood commercial district area.. The District includes all parcels that front West Portal Avenue between Ulloa Street and 15th Avenue. It also includes the parcels on both sides of Ulloa between West Portal Avenue and Claremont Boulevard.

Reference should be made to the detailed maps and the lists of parcels identified by Assessor Parcel Number that are contained in the Management District Plan, in order to determine which specific parcels are included in the West Portal Community Benefit District.

- The West Portal Community Benefit District will fund the following services:
1) Maintenance & Streetscape Improvements



Examples of services and improvements to be funded under the budget category “Maintenance & Streetscape Improvements” include programs that provide a cleaner and more aesthetically appealing environment for business, employees and pedestrians. Cleaning Services will include sidewalk sweeping and litter removal, power washing and scrubbing of sidewalks, removal of illegal signs/posters/stickers, and graffiti removal. In addition to the enhanced maintenance services, the CBD will undertake efforts to beautify the public right of way streetscape with seasonal banners, flower baskets, tree installations or other such beautification efforts.

2) Economic Development

Examples of services and improvements to be funded under the budget category “Economic Development” business retention and attraction programs, market research, district promotions, marketing materials, current property and vacancy data.

3) Advocacy and Administration

Examples of services to be funded under the budget category “Advocacy and Administration” include staffing for program management and advocacy work for the West Portal business district. Day to day administrative expenses including but not limited to bookkeeping, annual reports, and insurance.

- The proposed fiscal year 2011-2012 assessment for your parcel is «Voter Proportional». The duration of the assessment district is 13 years, the authority to levy assessments on your property would be thirteen (13) years, with services to be implemented January 1, 2012 through December 31, 2024. The West Portal CBD assessment will appear as a separate line item on the property tax bill. The final assessment would be collected on your property tax bill for fiscal year 2023-2024. The City will directly bill any Assessor’s Parcels which do not regularly receive a property tax bill from the City. The amount of the annual assessment for years 2 through 10 would be subject to annual adjustment by an amount not to exceed the change in the Consumer Price Index for All Urban Consumers in the San Francisco-Oakland-San Jose Consolidated Metropolitan Statistical Area, or 3%, whichever is less. The amount of your assessment could also be reduced in a subsequent fiscal year if the amount collected during the prior fiscal year exceeded the costs incurred of providing authorized services in the district. In such a case, your assessment for the subsequent year would be reduced by the share of the excess funds collected that is allocable to your property.
- The total amount chargeable to the entire assessment district would be \$198,000 in the first year. The total amount assessed to the entire assessment district over the life of the district (*assuming the maximum annual CPI adjustment of 3% in years 2 through 13*) would be \$3,092,321. The maximum amount assessed to the entire assessment district for each of the thirteen fiscal years is set forth in the following table.



TOTAL MAXIMUM AMOUNT OF ASSESSMENTS ON ALL PARCELS INCLUDED IN THE PROPOSED DISTRICT FOR EACH FISCAL YEAR, ASSUMING MAXIMUM ANNUAL CPI INCREASE OF 3% IN YEARS 2 THROUGH 10 ONLY

Fiscal Year Assessment	Maximum Total Assessment, Adjusted with Maximum Annual CPI Increase of 3%
2011-2012	\$198,000
2012-2013	\$203,940
2013-2014	\$210,058
2014-2015	\$216,360
2015-2016	\$222,851
2016-2017	\$229,536
2017-2018	\$236,422
2018-2019	\$243,515
2019-2020	\$250,820
2020-2021	\$258,345
2021-2022	\$266,095
2022-2023	\$274,078
2023-2024	\$282,301
Total Maximum Assessments	\$3,092,321

- The first year annual assessment rate for each parcel is calculated at

Category	Annual Assmt Rate
Linear Street Frontage	\$29.94020
Building Square Footage	\$0.074515

- In accordance with Section 67.7-1 of the San Francisco Administrative Code, persons who are unable to attend the hearing on this matter may submit written comments to the City prior to the time the hearing begins. These comments will be made a part of the official public record in this matter, and shall be brought to the attention of the Board of Supervisors. Written comments should be addressed to Angela Calvillo, Clerk of the Board, San Francisco Board of Supervisors, Room 244, City Hall, 1 Dr. Carlton B. Goodlett Place, San Francisco, California, 94102.

ASSESSMENT BALLOT PROCEDURES

Enclosed with this notice, you will find an assessment ballot. Please follow the directions on the assessment ballot to express your view on the proposed assessment. The following is a summary of



the procedures governing the return and tabulation of ballots. More detailed information concerning the ballot procedures is set forth in the enclosed "Procedures for the Completion, Return and Tabulation of Ballots," which is also available on the City's website at www.sfelections.org.

1. You may mail or deliver your ballot to the Director of Elections at the Post Office Box location shown on the ballot, or submit the ballot in person at the Department of Elections, located at City Hall Room 48.
2. Ballots may be sent or delivered to the Director of Elections at any time, but MUST be received by the Director of Elections not later than the conclusion of the public input portion of the public hearing on _____, 2011 in the Board's Legislative Chambers, Second Floor, City Hall, 1 Dr. Carlton B. Goodlett Place, San Francisco, California, 94102, scheduled to commence at 3 p.m. or as soon thereafter as the matter may be heard. Depending on the nature and extent of public testimony, the public input portion of the hearing may not be concluded on that date, but may instead be continued to a later date. At any time prior to the conclusion of the public input portion of the hearing, you may withdraw your ballot and submit a new or changed ballot in place of the ballot previously submitted. If the public input portion of the hearing is continued to a later date, the deadline for submission of ballots will likewise be extended until the close of public input on that date.
3. The Director of Elections will pick up mailed ballots at 12 o'clock noon from the designated Department of Elections Post Office box on the date scheduled for the public hearing. To ensure that mailed ballots are received by the Director of Elections prior to the conclusion of the public input portion of the hearing, mailed ballots must be received by the Director of Elections by 12 o'clock noon on _____, 2011. Mailed ballots received after 12 o'clock noon on the date scheduled for the public hearing will only be counted if the public input portion of the hearing is continued to a later date and the ballots are received by the Director of Elections prior to the conclusion of the public input portion of the hearing.
4. Only ballots with original signatures - not photocopies of signatures - will be accepted.
5. The Director of Elections will not accept or tabulate a ballot:
 - which is a photocopy without an original signature;
 - which is unsigned;
 - which lacks an identifiable "yes" or "no" vote; or
 - which appears to have been tampered with based upon its appearance or method of delivery.
6. The assessment ballot shall be treated as a disclosable public record during and after the tabulation of the assessment ballots.
7. At the conclusion of the public input portion of the public hearing, the Director of Elections will tabulate the ballots, including those received during the public input portion of the public hearing. If the number of ballots received at the hearing is such that it is not feasible to



accurately tabulate the ballots that day, the Board of Supervisors may continue the meeting to a later date for the purpose of obtaining the final tabulation.

8. The Board of Supervisors will not impose the assessment if there is a majority protest. A majority protest exists if, upon the conclusion of the hearing, ballots submitted in opposition to the assessment exceed the ballots submitted in favor of the assessment. Ballots shall be weighted according to the proposed financial obligation of the affected property.

Should you have any questions, please call or write to: Mr. Cuong Quach, Department of Elections, Room 48, City Hall, 1 Dr. Carlton B. Goodlett Place, San Francisco, California, 94102. Telephone: (415) 554-4342.



**Ballot on Assessment for the renewal and expansion of a
property-based business improvement district to be known as the
"West Portal Community Benefit District"**

«Barcode»

Assessor's Parcel Number: _____ Address of Parcel: _____

Property Owner's Name: _____

Property Owner's Address: _____

Proposed Assessment for this Parcel Beginning 2011-2012 Fiscal Year: _____ of Total: \$ _____

Proposed Range of Inflation Adjustment Formula: Year 2 through 13 assessments may be subject to annual adjustments based upon changes in the Bay Area Consumer Price Index (CPI) for all urban consumers, not to exceed 3% increase per year.

Instructions for Completing and Delivering this Ballot

*To express your view on the proposed assessment and the proposed range of inflation adjustment, check above the line before the word "YES" or "NO" below, then sign and date the ballot.

_____ Yes, I approve the proposed annual assessment described above on the parcel identified in this ballot, and I understand that my assessment could be subject to the inflation adjustment formuladescribed above.

_____ No, I do not approve the proposed annual assessment, on the parcel identified in this ballot, nor the inflation adjustment formula described above.

I hereby declare by penalty of perjury that I am a record owner or authorized agent for the record owner of the parcel listed above.

Signature of Record Owner or Authorized Agent Date

Print Name of Record of Owner. If Agent of Owner, Print Name and State Authorization

***After completing your ballot, please mail to:**

**Director
Department of Elections
P.O. Box _____
San Francisco, CA 94142-2189**

To hand deliver, please use the following address:

**Director
Department of Elections
City Hall
1 Dr. Carlton B. Goodlett Place, Room 48
San Francisco, CA 94102**

Ballots may also be delivered to the Director at the Public Hearing prior to the close of public testimony.

*Ballots may be sent or delivered to the Director at any time, but MUST be received in the mail not later than 12 P.M. (noontime) on the day of the public hearing or in person before the conclusion of the public testimony portion of the public hearing on the proposed assessment and assessment range. That hearing is set for 3:00 p.m. on _____,



Ballots received after that time will only be counted if the Board elects to continue public comment until a date.

FINAL

**West Portal
Community Benefit District
Management District Plan**

**San Francisco, California
May 2011**

**Prepared by:
Kristin Lowell Inc.**

For additional copies and information visit www.wpcbd.org

West Portal Community Benefit District Management District Plan

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ATTACHMENTS:

CBD Boundary Map

SECTION 1: Management District Plan Summary

Developed by a coalition of property and business owners, the West Portal Community Benefit District (CBD) is a proposed benefit assessment district designed to improve and convey special benefits to properties within the central business district of West Portal Avenue. The CBD is being established pursuant to the state law; the "Property and Business Improvement District Law of 1994", as amended and augmented by Article 15 of the San Francisco Business and Tax Regulations Code. The West Portal CBD will provide new services and activities, including; enhanced maintenance, streetscape improvements and economic development activities above and beyond what the City currently provides.

Location: The CBD is approximately 3 linear blocks. It includes all parcels that front West Portal Avenue between Ulloa Street and 15th Avenue. It also includes the public library, Muni transfer station and the parcels on both side of Ulloa between West Portal Avenue and Claremont Boulevard. A map of the proposed CBD boundaries is attached.

Services and Activities Provided:

- ◆ **Maintenance and Streetscape Improvements:** Programs that provide a cleaner and more aesthetically appealing environment for businesses, employees and pedestrians.
- ◆ **Economic Development:** Activities to support the growth and vitality of existing businesses, attract new businesses, and enhance the image of West Portal as a destination for consumer and investment revenues.

Budget: Total CBD budget for its first year of operation is **\$200,000**.

Method of Financing: Levy of assessments upon real property that specially benefit from the proposed services and activities.

Assessments: Annual assessments are calculated based upon each property's special benefit received from the identified services and activities and their relative cost. The assessment factors are based on building square footage and linear street frontage. The first year's assessment rates per foot are as follows:

Category	Annual Assmt Rate	Monthly Assmt Rate
Linear Street Frontage	\$29.94020	\$2.49502
Building Square Footage	\$0.074515	\$0.00618

CPI Adjustments: The CBD budget and assessments may be adjusted for inflation based on the consumer price index (CPI) for the San Francisco-Oakland-San Jose Area for all urban consumers not to exceed 3% annually to keep pace with the consumer price index and other program costs.

Collection: Assessments will appear as a separate line item on the annual County of San Francisco Property Tax bills or as a separate handbill from the County.

City Services: The Board of Supervisors, by adopting this plan, will confirm its intention to ensure an existing level of services in the district equivalent to the level that is being provided elsewhere in the City.

District Formation: CBD formation requires submission of petitions from property owners representing more than 30% of total assessments. Following a public hearing, if ballots, weighted by assessments, submitted in opposition to the assessment do not exceed the ballots submitted in favor of the assessments, the Board of Supervisors may authorize the formation of the district and the levy of assessments.

Duration: The CBD will have a thirteen year term commencing January 1, 2012 and terminating December 31, 2024 unless the property owners within the CBD elect to renew the District. Any major modifications or new or increased assessments during the term of the district that are not consistent with the provisions of original Management District Plan will require a new mail ballot process.

Governance The CBD will have a governing board, the Owners Association, pursuant to Section 36650 and 36651 of the Streets and Highways Code that will annually review the CBD budgets and policies within the limitations of the Management District Plan and file annual reports with the Board of Supervisors. The owner's association will incorporate as a non profit organization pursuant to the State Business and Tax regulations Code and will enter into a contract with the City and County of San Francisco to administer the district.

Section 2: CBD Improvement and Activity Plan

West Portal CBD Management District Plan

As determined by area property and business owners, the top priority for services and activities within the West Portal CBD area include:

- ◆ Enhanced Maintenance and Streetscape Improvements, and
- ◆ Economic Development
- ◆ Advocacy and Administration

Based upon these findings, the following service and activity categories will be funded by the CBD. The following narrative provides recommendations for the CBD's first year of operation. Program activities may be amended in subsequent years within the following general categories. Final programs and budgets will be subject to the review and approval of the CBD Owners Association prior to Board of Supervisors approval.

MAINTENANCE AND STREETSCAPE IMPROVEMENTS

The top priority for the West Portal property owners is enhanced maintenance services and street beautification. CBD maintenance teams will provide enhanced cleaning services, including sidewalk sweeping and litter removal, power washing and scrubbing of sidewalks, removal of illegal signs/posters/stickers, and graffiti removal. In addition to the enhanced maintenance services, the CBD will undertake efforts to beautify the public right-of-way streetscape and provide maintenance thereof. Such beautification efforts may include such items as; seasonal banners, flower baskets, tree installation or any other beautification efforts that the property owners deem necessary.

ECONOMIC DEVELOPMENT

It is not enough to just provide a clean and attractive business corridor and expect new business development to automatically appear. Attention must be focused on recruiting new investors to West Portal Avenue and retaining those businesses that adhere to the goals and missions of the CBD.

CBD funds will be used to do the market research and develop the demographics needed to attract future development and investment. Additionally, this program will identify the types of businesses and activities that are missing and needed in the West Portal business corridor. It will be important to continue to develop a strategy to recruit those businesses and activities. The Owners' Association will develop the annual work programs and budgets from a wide variety of options that may include, but not necessarily be limited to:

- ♦ Design and disseminate investor marketing materials to assist real estate brokers, developers and property owners in business recruitment efforts.
 - ♦ Create and maintain a database with a variety of market and real estate information.
 - ♦ Provide counseling, financing referrals and business support to start locally-owned independent businesses.
 - ♦ Provide trouble-shooting and liaison services between property and business owners and the City in an effort to entice investment and business operations in West Portal.
-

ADVOCACY AND ADMINISTRATION

The CBD supports a professional staff that delivers programs and advocates on behalf of the West Portal business district. The CBD advocacy services will provide direction on policies and issues that affect the central business district.

Administrative services include compensation paid to the Executive Director and a part-time administrative assistant, if needed, for the day-to-day operations of the CBD. The budget for this item also pays for expenses relating to rent, office expenses, financial bookkeeping, annual reporting expenses, insurance (both general liability coverage and director and officer liability coverage), and any other expenses the CBD will incur during operation.

Section 3: CBD Operating Budget

2012 Operating Budget

The following table outlines the CBD maximum assessment operating budget for 2012.

ACTIVITY	TOTAL
Streetscape Improvements	\$128,000
Economic Development	\$24,000
Administration/Advocacy	\$48,000
Total Activities	\$200,000
LESS: Contribution from other sources, 1%	(\$2,000)
NET CBD ASSESSMENT BUDGET	\$198,000

- ♦ Approximately 1% of the overall budget will be revenues received from outside funds, e.g. grants, donations, contracts, in-kind services. *Note: Please see discussion in Exhibit C under General Benefit.*
- ♦ The CBD budget and assessments may be adjusted for inflation based on the consumer price index for the San Francisco-Oakland-San Jose Area for all urban consumers not to exceed 3% to keep pace with the consumer price index and other program costs.
- ♦ Every year the Owners' Association may reduce the annual budget and assessments, if it is deemed that not all services are needed for the following fiscal year.

13-Year Maximum Assessment Budget

The following table illustrates the CBD's maximum annual assessment budget for the 13-year life term adjusting it by the 3% inflation factor.

Fiscal Year Assessment	Maximum Total Assessment, Adjusted with Maximum Annual CPI Increase of 3%
2011-2012	\$198,000
2012-2013	\$203,940
2013-2014	\$210,058
2014-2015	\$216,360
2015-2016	\$222,851
2016-2017	\$229,536
2017-2018	\$236,422
2018-2019	\$243,515
2019-2020	\$250,820
2020-2021	\$258,345
2021-2022	\$266,095
2022-2023	\$274,078
2023-2024	\$282,301
Total Maximum Assessments	\$3,092,321

Section 4: Public Sector Participation

Existing City Services

The Board of Supervisors, by adopting this plan, will confirm its intention to ensure an existing level of services in the district equivalent to the level that is being provided elsewhere in the City.

Assessment funds will to pay for services that are above and beyond those services provided by the City.

Public Property Assessments

Proposition 218 states that no parcel is exempt from assessments if that parcel receives benefit from the improvements and activities. This includes government and Public use parcels. The City of San Francisco and any other government owned parcels within the CBD boundary will pay their assessment based on the special benefits conferred to those parcels. Government parcels receive benefit from the maintenance and streetscape improvements, but not from the economic development activities. Therefore, government uses will only be assessed on their fair share for the costs of the maintenance and streetscape improvements. The assessment methodology is to allocate the cost of these improvements on the basis of each parcel's linear street frontage. Please see Section 5: Assessment Methodology for further discussion.

The City and County of San Francisco owns 5 parcels within the CBD boundary, APNs: 2919 031, 2979A002, 2979A034, 2988A007, and 2979 013A.

Section 5: Assessment Methodology

General

This Management District Plan provides for the levy of assessments for the purpose of providing services and activities that specially benefit real property in the CBD. These assessments are not taxes for the general benefit of the City, but are assessments for the services and activities which confer special benefits upon the real property for which the services and activities are provided.

Assessment Factors

West Portal property owners and business owners have emphasized that the assessment formula for the West Portal CBD be fair, balanced and have a direct relationship to special benefits received. The State enabling legislation also states, "Assessments levied on real property...shall be levied on the basis of the estimated benefit to the real property within the...district."

The assessment methodology for the District applies linear street frontage for the Maintenance and Streetscape Improvements and building square footage for the Economic Development Programs.

Government and residential uses only receive benefit from the maintenance and streetscape improvements, and therefore will be assessed on their fair share for the costs of these improvements. These uses do not receive benefit from the economic development activities, so therefore will not be assessed for any cost of these activities. That is to say that government and residential parcels will only be assessed for their linear street frontage and not building square footage.

Linear Street Frontage: Is the primary assessment variable for the Maintenance and Streetscape improvements. This reflects the fact that services delivered to each property along West Portal Avenue and Ulloa Street will have the greatest benefit to properties in relation to their exposure on the streets. That is to say that the more linear frontage a parcel has the more benefit it will receive from the services. Linear street frontage is also the primary assessment variable for the Advocacy and Administration activities. This acknowledges the fact that the Maintenance and Streetscape improvements are the greatest portion of the CBD budget, and therefore will require the largest effort advocating and administering. Approximately 84% of the Advocacy and Administration budget is allocated to the linear street frontage. Linear frontage footage was obtained from the County Assessor's parcel maps.

Building Square Footage: Is the primary assessment variable for Economic Development activities. The intent of the economic development program is to recruit and retain business investment. The larger the building the more benefit that parcel will receive from

these business recruitment activities. It also acknowledges the benefits from the services to the buildings, including tenants, residents and employees. Building square footage is the secondary assessment variable for the Advocacy and Administration activities. This acknowledges the fact that the Economic Development activities will require significantly less advocating and administering than the Maintenance and Streetscape improvements. Approximately 16% of the Advocacy and Administration budget is allocated to the building square footage.

Assessment Calculation

As discussed in Exhibit A, there are three activities proposed for the West Portal CBD; maintenance/streetscape, economic development and CBD advocacy and administration. The CBD advocacy/administration expense and the 1% from other sources are allocated to the other two activities based on each activities budget percentage of the total.

Activity	Total Service Budget	% of Budget	LESS: Other Income (1%)	Total Assessment Budget (99%)
Maintenance & Streetscape Improvements	\$128,000	64.00%	\$1,684.20	\$166,737
Economic Development	\$24,000	12.00%	\$315.80	\$31,263
Advocacy/Administration	\$48,000	24.00%		
TOTAL:	\$200,000	100.00%	2,000.00	\$198,000

To calculate the assessment for the improvements and activities, take the cost for each of the activities and divide it by the appropriate footage. There are 5,569 assessable linear feet and 410,786 assessable building square feet within the district boundary.

Therefore the assessment rate for the Maintenance and Streetscape improvements is \$29.94206 per linear foot (\$166,737 divided by 5,569). The assessment rate for the Economic Development programs is \$0.07611 per buildings square foot (\$31,263 divided by 410,786). The first year's assessment rates are as follows:

Category	Annual Assmt Rate	Monthly Assmt Rate
Linear Street Frontage	\$29.94206	\$2.49517
Building Square Footage	\$0.07611	\$0.00634

Annual Assessment Adjustments

Residential and Government Owned Parcels: Proposition 218 states that no parcel zoned for commercial, mixed use or public is exempt from assessments if that parcel receives benefit from the improvements and activities, this includes mixed use residential and government use parcels. In the West Portal CBD residential and public uses receive benefit from the maintenance and streetscape improvements, but not from the economic development activities. Therefore, residential and public uses will only be assessed their fair share for the costs of the maintenance and streetscape improvements.

Budget Adjustment: Any annual budget surplus or deficit will be rolled over to the following year's CBD budget, and assessments recalculated proportionately as long as it stays within the annual maximum 3% CPI adjustment.

Time and Manner for Collecting Assessments

As provided by state law, the West Portal CBD assessment will appear as a separate line item on the annual San Francisco City and County property tax bills, or by a special manual bill prepared by the City and County of San Francisco and either paid in one lump sum or in two equal installments. Laws for enforcement and collection of property taxes also apply to the CBD assessment.

Disestablishment

State law provides for the disestablishment of a CBD pursuant to an annual process. The 30-day period begins each year on the anniversary day that the Board of Supervisors first establishes the District. Within this annual 30-day period, if the owners of real property who pay more than 50 percent of the assessments levied submit a written petition for disestablishment, the CBD may be dissolved by the Board of Supervisors. The Board of Supervisors must hold a public hearing on the proposed disestablishment before voting on whether or not to disestablish the district.

Duration

The CBD will have a thirteen year term commencing January 1, 2012 and terminating December 31, 2024 unless the property owners within the CBD elect to renew the District. Any major modifications or new or increased assessments during the term of the district that are not consistent with the provisions of original Management District Plan will require a new mail ballot process.

Bond Issuance

No bonds will be issued to finance improvements.

Section 6: CBD Governance

Board of Supervisors

Following the submission of petitions from property owners representing more than 30% of the assessments to be paid, the Board of Supervisors, upon holding a public hearing on the proposed District, may elect to form a CBD. The CBD is established by a Board of Supervisors resolution, including the levy of an assessment on property, if the assessment is first approved by parcel owners in a balloting process.

CBD Governance

Governance The CBD will have a governing board, the Owners Association, pursuant to Section 36650 and 36651 of the Streets and Highways Code that will annually review the CBD budgets and policies within the limitations of the Management District Plan and file annual reports with the Board of Supervisors. The owner's association will incorporate as a non profit organization pursuant to the State Business and Tax regulations Code and will enter into a contract with the City and County of San Francisco to administer the district.

Per Section 1511 of the San Francisco Tax Regulations Code at least 20% of the voting members of the owners association shall be comprised of business owners located within the district that do not own, or have ownership interest in, commercial property located within the district. The owner's association will annually review the CBD budgets and policies within the limitations of the Management District Plan and file annual reports with the Board of Supervisors.

Section 7: Implementation Timeline

The West Portal CBD will have a thirteen year life from January 1, 2012 to December 31, 2024.

In order for the CBD to meet the start-up date of January 1, 2012, the formation needs to adhere to the following schedule:

-
- | | |
|-----------------|--|
| 2010-2011 | - Gather petition signatures |
| May 2011 | - Board of Supervisors adopts Resolution of Intention |
| | - Ballots are mailed (pursuant to Prop 218) |
| August 2011 | - Ballot tally and final Public Hearing |
| | - Board of Supervisors adopts Resolution of Establishment |
| October 2011 | - Initiate Administrative Contract with Owners Association |
| Fall 2011 | - Owners Association starts implementation plan |
| January 1, 2012 | - Begin CBD operations |

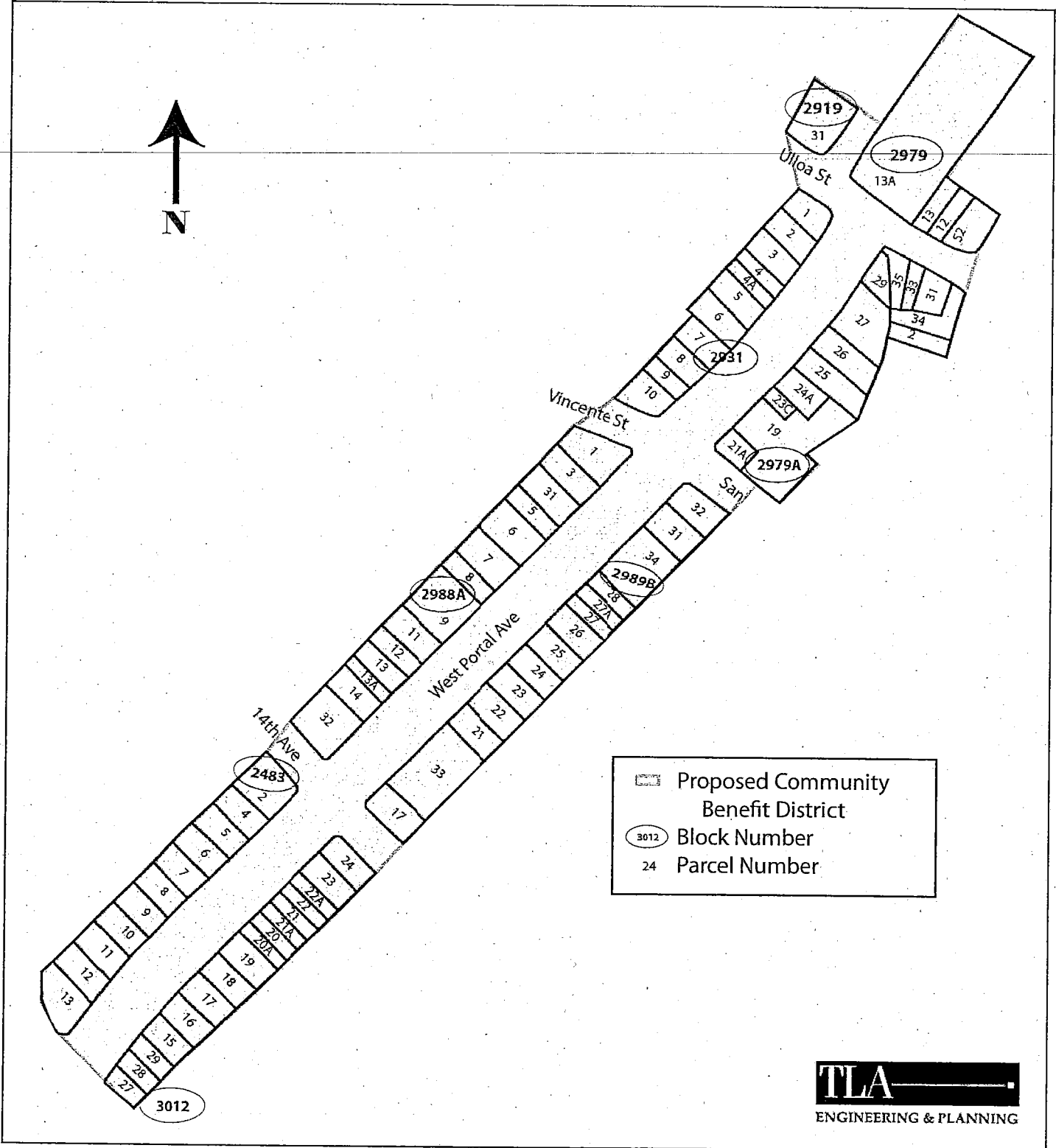
Section 8: Assessment Roll

The following table lists the assessment roll for 2012.

APN	Owner Name	Site Address	PARCEL ASSMT	MONTHLY ASSMT
3012 018	3 R Company Lp	343 West Portal Ave	\$2,342.87	\$195.24
3012 019	3 R Company Lp	343 West Portal Ave	\$2,151.61	\$179.30
2979A031	Aidel Corp Landlord Cafe Tsing	807 - 815 Ulloa St	\$2,110.08	\$175.84
2979A025	Aidel Corp The	49 - 57 West Portal Ave	\$1,920.10	\$160.01
2483 012	Ampek Company	380 West Portal Ave Ste G	\$2,035.70	\$169.64
2988A032	Bacciocco Enterprises Llc	290 West Portal Ave	\$6,079.83	\$506.65
3012 016	Balestrieri Family Revocable Tr	369 - 373 West Portal Ave	\$1,846.73	\$153.89
2979A026	Barbco Llc	41 - 47 West Portal Ave	\$1,791.38	\$149.28
2483 011	Basuino Joeph E & Ann M Trustees	372 West Portal Ave	\$1,497.10	\$124.76
3012 027	Beatty Marilee S Living Tr	393 West Portal Ave	\$3,313.96	\$276.16
2988A031	Burton D Goldstein Revoc Trust	130 - 140 West Portal Ave	\$2,087.69	\$173.97
2989B033	Chijan Living Trust	279 West Portal Ave	\$4,780.82	\$398.40
3012 024	Chouteau Walter C	301 - 309 West Portal Ave	\$4,702.37	\$391.86
2931 007	Choy Family Trust The	62 - 70 West Portal Ave	\$1,847.19	\$153.93
3012 022	Chung Enterprises Lp	323 - 325 West Portal Ave	\$1,137.07	\$94.76
3012 022A	Chung Enterprises Lp	319 - 321 West Portal Ave	\$1,140.12	\$95.01
2919 031	City Property	900 - 910 Ulloa St	\$5,362.62	\$446.89
2979A002	City Property	Parking Lot	\$898.26	\$74.86
2979A034	City Property	819 V	\$3,697.84	\$308.15
2988A007	City Property	174 - 180 West Portal Ave	\$1946.23	\$162.19
2989B027A	Dagemmijan, Arthur A	163-167 West Portal Ave	\$938.44	\$78.20
2979 013	Donahue Richard C & Pamela C	840 - 850 Ulloa St	\$1044.38	\$87.03
2988A013	Edwin R & Susan Rosenberg Revoc T	240 - 244 West Portal Ave	\$1479.12	\$123.26
2931 004	Ehikian Bradley R	32 West Portal Ave	\$939.81	\$78.32
2483 009	Eng 1990 Trust	360 West Portal Ave	\$1,994.99	\$166.25
3012 015	Espinosa Norma C Living Trust	377 West Portal Ave	\$1,708.45	\$142.37
2989B017	Fox Family Trust Bank Of America	299 West Portal Ave	\$5,041.14	\$420.10
2989B027	Froba Revocable Trust 2003	169 - 173 West Portal Ave	\$938.82	\$78.24
3012 017	Galli Mildred D Trustee	361 - 365 West Portal Ave	\$1,856.17	\$154.68
2483 013	Glass Properties Lp	398 West Portal Ave	\$2,754.67	\$229.56
2989B032	Greenspan Family Trust	101 - 107 West Portal Ave	\$5,101.12	\$425.09
2979A027	Greenspan Henry & Hedwa Fam Tr	21 - 37 West Portal Ave	\$3,294.16	\$274.51
3012 023	Harbin West Hldgs Llc	311 - 317 West Portal Ave	\$1,922.76	\$160.23
2989B026	Harvey & Nancy Rogers Fmly Lp	179 - 183 West Portal Ave	\$1,877.33	\$156.44
2931 004A	Hau Family Tr	36 - 40 West Portal Ave	\$942.62	\$78.55
2988A013A	Hodge Beverly Jean	248 - 250 West Portal Ave	\$923.21	\$76.93
2988A003	Hsu Arthur C&Glendy M Trustees	118 - 126 West Portal Ave	\$1807.83	\$150.65
3012 021	Huffman Bert	331 West Portal Ave	\$1,009.59	\$84.13
2989B022	Kermani Eleanore	233 West Portal Ave	\$2,257.55	\$188.13
2989B028	Kwack Myung Sook	157 - 161 West Portal Ave	\$1,371.66	\$114.31
2483 002	Lamorinda Development & Inv	300 West Portal Ave	\$5,350.48	\$445.87
2931 003	Landa Laurence D Trust	24 - 30 West Portal Ave	\$2,242.33	\$186.86
2483 006	Lasa Ignacio D	330 West Portal Ave	\$1,497.10	\$124.76
2979A035	Lasa Ignacio D	1 West Portal Ave	\$2,582.70	\$215.23

APN	Owner Name	Site Address	PARCEL ASSMT	MONTHLY ASSMT
2989B025	Lrs West Portal Investment Grp Llc	195 - 199 West Portal Ave	\$1,798.48	\$149.87
2989B031	Malouf Rodney	111 - 127 West Portal Ave	\$2,239.56	\$186.63
2988A009	Mar Living Trust	190 - 198 West Portal Ave	\$4,265.10	\$355.43
2483 010	Mark & Helen Pasquini Properti	362 - 366 West Portal Ave	\$1,835.77	\$152.98
2483 007	Martinucci Family Trust	338 - 342 West Portal Ave	\$1,835.55	\$152.96
2483 008	Martinucci Family Trust	346 - 350 West Portal Ave	\$1839.58	\$153.30
2979A033	Mary Virginia Beroldo Revoc Tr	819 - 823 Ulloa St	\$1,038.30	\$86.53
2979A024A	Mitchell Trust The	59 - 63 West Portal Ave	\$1,774.89	\$147.91
3012 028	Morehead Beaty S Living Tr	381 West Portal Ave	\$1,359.96	\$113.33
2931 008	Norack Betty J Exempt Trust	76 - 78 West Portal Ave	\$1,986.77	\$165.56
2989B023	Northshore Resources Vi Ltd Partnership,	201 - 225 West Portal Ave	\$1,877.33	\$156.44
2989B024	Northshore Resources Vi Ltd Partnership,	201 - 225 West Portal Ave	\$1,877.33	\$156.44
2979A021A	Olson Susan M	99 West Portal Ave	\$3,453.18	\$287.77
2979A019	Patricia O Shapiro 2006 Tr	75 - 91 West Portal Ave	\$7,743.38	\$645.28
2979A023C	Pedro A F & Madeleine Galletti Revoc Tr	69 West Portal Ave	\$971.06	\$80.92
2979 013A	Recreation And Park Department	Muni Station/ Park	\$7,485.52	\$623.79
2988A008	Roher Martin S & Anne	186 West Portal Ave	\$1,287.71	\$107.31
2989B021	Sallaberry, George Sarnowski Yv	243 - 255 West Portal Ave	\$1,877.33	\$156.44
2988A005	Sapone John Exempt Marital Tru	150 - 156 West Portal Ave	\$1,445.58	\$120.47
2931 006	Schainsinger Family Trust 1989	54 - 60 West Portal Ave	\$1,903.81	\$158.65
2979 012	Shim Tom J & In Soon	820 - 824 Ulloa St	\$1,125.29	\$93.77
2931 005	Stratigos Theodore G	44 - 50 West Portal Ave	\$1,744.45	\$145.37
2483 004	Sugrue Family Charitable Trust	312 - 318 West Portal Ave	\$1,801.53	\$150.13
2988A001	Survivors Trust	101 Vicente St	\$5,466.34	\$455.53
2988A014	Thompson Giusti Properties	260 West Portal Ave	\$1,777.60	\$148.13
2988A012	Tobriner Rosabelle R & Tobrine	230 - 238 West Portal Ave	\$1,295.54	\$107.96
2988A011	Totah John B&Sellweh M 1989 Rev Tr	220 - 226 West Portal Ave	\$1,827.33	\$152.28
2483 005	Villafuerte, Richard M	320 - 328 West Portal Ave	\$1,835.55	\$152.96
2931 009	Washington Mutual Bank	98 West Portal Ave	\$1,924.99	\$160.42
2931 010	Washington Mutual Bank	98 West Portal Ave	\$4,561.03	\$380.09
2979 052	West Portal Mobil	800 Ulloa St	\$2,046.54	\$170.55
2931 001	Westportal Lic	2 West Portal Ave	\$3,995.09	\$332.92
2931 002	Westportal Lic	16 West Portal Ave	\$1,850.16	\$154.18
2989B034	Wfc Holdings Corp.	145 West Portal Ave	\$3,898.41	\$324.87
2979A029	William A Siskin Exemption Tr	7 - 15 West Portal Ave	\$2,296.81	\$191.40
3012 029	Wipf Family Exemption Trust	379 West Portal Ave	\$1,298.50	\$108.21
2988A006	Wong Ying-Wood	170 West Portal Ave	\$2,501.34	\$208.45
3012 020	Yang Chi-Kuo & Lee Chen	335 - 337 West Portal Ave	\$1,011.12	\$84.26
3012 020A	Yang Chi-Kuo & Lee Chen	339 - 341 West Portal Ave	\$1140.12	\$95.01
3012 021A	Zhao/Zheng Family Tr	327 - 329 West Portal Ave	\$1,140.12	\$95.01
TOTAL:			\$198,000.00	

Proposed Boundaries of the West Portal CBD May 2011



Attachment A

FINAL

West Portal Community Benefit District Engineer's Report

San Francisco, California

May 2011

**Prepared by:
Kristin Lowell Inc.**

*Prepared pursuant to the State of California
Property and Business Improvement District Law of 1994
And Article XIII D of the California Constitution
to create a property-based business improvement district*

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ENGINEER'S STATEMENT

This Report is prepared pursuant to Section 36600 et. seq. of the California Streets and Highways Code (the "Property and Business Improvement District Law of 1994" as amended) (here and after "State Law") and pursuant to the provisions of Article XIID of the California Constitution (Proposition 218); augmented by Article 15 of the San Francisco Business and Tax Regulations Code.

The West Portal Community Benefit District ("CBD") is designed to improve and benefit properties in the West Portal area of San Francisco. Every assessed property within the CBD receives special benefit from the enhanced maintenance and streetscape improvements, economic development activities, and administration/advocacy activities. Only those properties within the CBD shall receive the special benefit of these proposed improvements and activities (Exhibit A).

The duration of the CBD is thirteen (13) years and an estimated budget for the CBD improvements and activities is set forth in Exhibit B. Assessments may be adjusted annually by the annual change in the Bay Area Consumer Price Index (CPI) for all urban consumers, or a maximum of 3%, whichever is less, to be determined by the Owners' Association. The CBD will have a governing board, the Owners Association, pursuant to Section 36650 and 36651 of the Streets and Highways Code that will annually review the CBD budgets and policies within the limitations of the Management District Plan and file annual reports with the Board of Supervisors. The owner's association will incorporate as a non profit organization pursuant to the State Business and Tax regulations Code and will enter into a contract with the City and County of San Francisco to administer the district.

Funding for the CBD improvements and activities shall be derived from a property based assessment of each benefited parcel in the CBD. A detailed description of the methodology for determining the benefit assessment for each parcel is set forth in Exhibit C.

This Report includes the following attached Exhibits:

- EXHIBIT A: A detailed description of the improvements and activities to be provided
- EXHIBIT B: The estimate of the cost of the improvements and activities
- EXHIBIT C: A statement of the method by which the undersigned determined the amount proposed to be assessed against each parcel, based on benefits to be derived by each parcel, respectively, from the improvements and activities.
- EXHIBIT D: An assessment roll, showing the amount proposed to be specially assessed against each parcel of real property within this assessment district.



Respectfully submitted,

Terrance E. Lowell
Terrance E. Lowell, P.E.

EXHIBIT A: IMPROVEMENTS AND ACTIVITIES

Through a lengthy process of working with the West Portal stakeholders to identify the improvements and activities that best suited the West Portal corridor, three (3) service categories are proposed:

- Maintenance and Street Beautification
- Economic Development
- Administration and Advocacy

All of the services provided such as the maintenance and streetscape improvements are over and above the City's baseline of services and are not provided by the City. These services are not provided outside of the District and because of their unique nature focusing on the particular needs of each property within the District provide distinct and special benefits to each of the parcels throughout the District. For further discussion of special benefit, please refer to Exhibit C.

Maintenance and Streetscape Improvements

The top priority for the West Portal property owners is enhanced maintenance services and street beautification. CBD maintenance teams will provide enhanced cleaning services, including sidewalk sweeping and litter removal, power washing and scrubbing of sidewalks, removal of illegal signs/posters/stickers, and graffiti removal. In addition to the enhanced maintenance services, the CBD will undertake efforts to beautify the public right-of-way streetscape and provide maintenance thereof. Such beautification efforts may include such items as; seasonal banners, flower baskets, tree installation or any other beautification efforts that the property owners deem necessary.

Economic Development Activities

It is not enough to just provide a clean and attractive business corridor and expect new business development to automatically appear. Attention must be focused on recruiting new investors to West Portal Avenue and retaining those businesses that adhere to the goals and missions of the CBD.

CBD funds will be used to do the market research and develop the demographics needed to attract future development and investment. Additionally, this program will identify the types of businesses and activities that are missing and needed in the West Portal business corridor. It will be important to continue to develop a strategy to recruit those businesses and activities. The Owners' Association will develop the annual work programs and budgets from a wide variety of options that may include, but not necessarily be limited to:

- ♦ Design and disseminate investor marketing materials to assist real estate brokers, developers and property owners in business recruitment efforts.

- ♦ Create and maintain a database with a variety of market and real estate information.
- ♦ Provide counseling, financing referrals and business support to start locally-owned independent businesses.
- ♦ Provide trouble-shooting and liaison services between property and business owners and the City in an effort to entice investment and business operations in West Portal.

Advocacy and Administration

The CBD supports a professional staff that delivers programs and advocates on behalf of the West Portal business district. The CBD advocacy services will provide direction on policies and issues that affect the central business district.

Administrative services include compensation paid to the Executive Director and a part-time administrative assistant, if needed, for the day-to-day operations of the CBD. The budget for this item also pays for expenses relating to rent, office expenses, financial bookkeeping, annual reporting expenses, insurance (both general liability coverage and director and officer liability coverage), and any other expenses the CBD will incur during operation.

EXHIBIT B: ESTIMATE OF COST

2012 Operating Budget

The following table outlines the CBD maximum assessment operating budget for 2012.

ACTIVITY	TOTAL	% of Total
Streetscape Improvements	\$128,000	64.0%
Economic Development	\$24,000	12.0%
Administration/Advocacy	\$48,000	24.0%
Total Activities	\$200,000	100.0%
LESS: Other Sources of Funds, 1%	<\$2,000>	
NET CBD ASSESSMENT BUDGET	\$198,000	

- ♦ Approximately 1% of the overall budget will be revenues received from outside funds, e.g. grants, donations, contracts, in-kind services. *Note: Please see discussion in Exhibit C under General Benefit.*
- ♦ The CBD budget and assessments may be adjusted for inflation based on the consumer price index for the San Francisco-Oakland-San Jose Area for all urban consumers or a maximum of 3%, whichever is less, to be determined by the management corporation to keep pace with the consumer price index and other program costs.
- ♦ Every year the Owners' Association may reduce the annual budget and assessments, if it is deemed that not all services are needed for the following fiscal year.

Bond Issuance: No bonds will be issued to finance improvements.

EXHIBIT C: METHOD OF APPORTIONMENT

CBD Boundary

The CBD is approximately 3 linear blocks. It includes all parcels that front West Portal Avenue between Ulloa Street and 15th Avenue. It also includes the public library, Muni transfer station and the parcels on both side of Ulloa between West Portal Avenue and Claremont Boulevard. A map of the proposed CBD boundaries is attached.

General Benefit

The law requires that any assessment district may only assess those parcels that receive a distinct special benefit from the services provided. If there is any benefit to the surrounding community or the public at large, then said properties may not be assessed for that portion that is determined to be of a general nature. General benefit is defined as a benefit to the surrounding community or the public, in general, resulting from the improvement, activity or service to be provided by the assessment levied. Inasmuch as all services will be provided to the properties within the District boundaries and no services will be provided outside the District boundaries only those parcels within the CBD will be assessed for the special benefits conferred.

The City of San Francisco along with the West Portal business district conducted an intercept street survey to quantify the general benefits, if any, the CBD improvements and activities will provide. The survey identified the likelihood of those passing by to engage in commerce activity within the business district. Of those surveyed less than 1% indicated that they do not nor do they ever have the intention of engaging in any type of commerce regardless of any future CBD services being provided. With that said, the West Portal CBD budget will incorporate the 1% survey results to address the general benefit that those passing by will not engage in any type of commerce activity regardless of the CBD provided services. The 1% of the district funds will be raised from a variety of sources, e.g., grants, charitable contributions, in-kind services, etc.

Special Benefit

The Property and Business Improvement District Law of 1994, as amended, and the State Constitution Article XIII D require that assessments be levied according to the special benefit each assessed parcel receives from the improvements and activities. Every parcel within the CBD will only be assessed for the special benefits each parcel receives from the improvements and activities.

West Portal, like other neighborhood districts in San Francisco, is a commercial corridor that is to serve the surrounding residential community. It has retail/commercial ground floor uses while the upper floors, if any, are residential uses. The types of retail/commercial uses are those that support the needs of the residential community; e.g. banking, local grocery stores, hardware stores, professional services, local retail and boutiques.

The improvements and activities that the West Portal CBD will provide are detailed below and are provided only within the boundaries of the District and provide special benefits to those properties within the CBD boundary. The special benefit must affect the assessed property 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.

We determined that the proposed improvements and activities discussed below provide primarily special benefits to the real property within the district area. Each of the programs is designed to meet the goals of each individual parcel; to improve the appearance, to increase building occupancy and lease rates, to encourage new business development and attract ancillary businesses and services, and encourage commerce. A basic premise of commercial business is that increased pedestrian traffic increases the economic return to the property. The increase in pedestrian traffic is likely to encourage commerce whether it on the first visit or in subsequent visits. All pedestrian traffic is considered to be potential customers who will become the target audience for future patronage of retail and business establishments and services, and the renting of space in commercial and residential buildings. The enhanced CBD services are a special benefit to each parcel because they are intended to increase the pedestrian traffic.

Maintenance and Streetscape Improvements

These activities as described in Exhibit A will provide maintenance and streetscape beautification activities above the base level of services provided by the City. The services the maintenance teams provide are specific to the West Portal area, thus, each assessed parcel located in the District specially benefits from this enhanced level of maintenance and streetscape activities. The maintenance and streetscape activities will not be delivered to any parcel outside the CBD boundary and are intended to meet the goals of the CBD as discussed above. Therefore, it is our opinion that each of the parcels in the district is only assessed for the special benefits conferred.

Economic Development

These activities, as described in Exhibit A, are intended to retain and attract new business. This is in an effort to encourage investment in the district. In order to accomplish this, the CBD proposes a myriad of economic development activities. These activities are designed to specially benefit only those parcels in the District boundaries by encouraging future investment and commerce. Therefore, it is our opinion that each parcel in the district is only assessed for the special benefits conferred.

Advocacy/Administration

This program as described in Exhibit A is designed to develop public/private partnerships that will enhance the goals and needs of the CBD area all in an effort to increase investment dollars and commerce. The program is geared to increase customers and pedestrian traffic to the area. The above benefits are to be provided only to the assessed parcels within the CBD boundaries. Therefore, it is our opinion that each parcel in the district is only assessed for the special benefits conferred.

In addition to the special benefits described above for the activities described above there are also less tangible reasons why these activities provide a special benefit to those properties within the CBD.

1. All improvements and activities to be provided through the CBD are special services and are above and beyond the general level of service the City currently provides.
2. All improvements and activities to be provided through the CBD are designed by the property owners to increase business revenue and provide special benefits that may result in increased rental occupancy rates and annual revenue incomes to the owners of real property within the district.
3. The California State Legislature found that assessments levied for the purpose of providing improvements and promoting activities that benefit real property are not taxes for the general benefit of a city, but are assessments for the improvements and activities which confer special benefits upon the real property for which the improvement and activities are provided. Streets and Highways Code Section 36601 (d).

Assessment Methodology

Determining the proportionate share of special benefit among the parcels of real property, including the government owned parcels, within the proposed assessment district which benefit from the proposed improvements is the result of a four-step process:

1. Defining the proposed improvements.
2. Identifying how each assessed parcel specially benefits from the proposed improvements and activities.
3. Determining the amount of the special benefit each assessed parcel receives in relation to the other parcels in the district.
4. Apportioning the cost of the proposed improvements and activities to each assessed parcel based on the special benefit received.

The proposed improvements and activities as outlined in Exhibit A will provide a higher level of service than the City provides with City funds to those parcels in the CBD area. Therefore, every parcel in the CBD benefits from the improvements and activities and will receive enhanced maintenance and streetscape activities, economic development, and administration/advocacy. The CBD programs are designed to deliver service to each parcel within the district.

Assessment Factors

The West Portal property owners and business owners have emphasized that the assessment formula for the CBD must be fair, balanced and have a direct relationship to benefits received. The State enabling legislation, Section 36632(a) of the Streets and Highways Code, also states, "Assessments levied on real property...shall be levied on the basis of the estimated benefit to the real property within the...district."

The assessment methodology for the West Portal CBD spreads the cost of the improvements and activities to linear street frontage and building square footage.

Government and residential uses only receive benefit from the maintenance and streetscape improvements, and therefore will be assessed on their fair share for the costs of these improvements. These uses do not receive benefit from the economic development activities, so therefore will not be assessed for any cost of these activities. That is to say that government and residential parcels will only be assessed for their linear street frontage and not building square footage.

Linear Street frontage is the primary assessment variable for the Maintenance and Streetscape improvements. This reflects the fact that services delivered to each property along West Portal Avenue and Ulloa Street will have the greatest benefit to properties in relation to their exposure on the streets. That is to say that the more linear frontage a parcel has the more benefit it will receive from the services. Linear street frontage is also the primary assessment variable for the Advocacy and Administration activities. This acknowledges the fact that the Maintenance and Streetscape improvements are the greatest portion of the CBD budget, and therefore will require the largest effort advocating and administering. Approximately 84% of the Advocacy and Administration budget is allocated to the linear street frontage. Properties are assessed for all street frontages. Properties with more than one street frontage such as corner lots are assessed for the sum of all the parcels' street frontage. Linear front footage was obtained from the County Assessor's parcel maps.

Building square footage is the primary assessment variable for Economic Development activities. The intent of the economic development program is to recruit and retain business investment. The larger the building the more benefit that parcel will receive from these business recruitment activities. It also acknowledges the benefits from the services to the buildings, including tenants, residents and employees. Building square footage is the secondary assessment variable for the Advocacy and Administration activities. This acknowledges the fact that the Economic Development activities will require significantly less advocating and administering than the Maintenance and Streetscape improvements. Approximately 16% of the Advocacy and Administration budget is allocated to the building square footage. Building square footage is defined as gross building square footage as determined by the outside measurements of a building.

Assessment Calculation

To allocate the administration/advocacy portion of the budget and the 1% from other sources is to spread those costs on a pro-rata basis to the streetscape improvements and economic development budgets, please see the table below:

Activity	Total Service Budget	% of Budget	LESS: Other Income (1%)	Total Assessment Budget (99%)
Streetscape Improvements	\$128,000	64.00%	\$1,684.20	\$166,737
Economic Development	\$24,000	12.00%	\$315.80	\$31,263
Advocacy/Administration	\$48,000	24.00%		
TOTAL:	\$200,000	100.00%	2,000.00	\$198,000

To calculate the assessment for the improvements and activities is to take the cost for each of the activities and divide it by the appropriate footage. There are 5,569 assessable linear feet and 410,786 assessable building square feet within the district boundary.

Therefore the assessment rate for the Maintenance and Streetscape improvements is \$29.94206 per linear foot (\$166,737 divided by 5,569). The assessment rate for the Economic Development programs is \$0.07611 per buildings square foot (\$31,263 divided by 410,786). The first year's assessment rates are as follows:

Assessment Factors:	# of Feet	Budget Assigned To	Annual Assmt Rate, per foot	Monthly Assmt Rate, per foot
Linear Frontage	5,569	\$166,737	\$29.94206	\$2.49517
Building Square Footage	410,786	\$31,263	\$0.07611	\$0.00634

Assessment Adjustments

Residential and Government Owned Parcels: Proposition 218 states that no parcel is exempt from assessments if that parcel receives benefit from the improvements and activities, this includes residential and government use parcels. This is based on the premise that in this case residential and government parcels receive benefit from the maintenance and streetscape improvements, but not from the economic development activities. Therefore, residential and government uses will only be assessed their fair share for the costs of the maintenance and streetscape improvements.

The City and County of San Francisco owns 5 parcels within the CBD boundary, APNs: 2919 031, 2979A002, 2979A034, 2988A007, and 2979 013A.

EXHIBIT D: ASSESSMENT ROLL

The total assessment amount for 2012 is \$198,000 apportioned as follows:

APN	Owner Name	Site Address	PARCEL ASSMT	MONTHLY ASSMT
3012 018	3 R Company Lp	343 West Portal Ave	\$2,342.87	\$195.24
3012 019	3 R Company Lp	343 West Portal Ave	\$2,151.61	\$179.30
2979A031	Aidel Corp Landlord Cafe Tsing	807 - 815 Ulloa St	\$2,110.08	\$175.84
2979A025	Aidel Corp The	49 - 57 West Portal Ave	\$1,920.10	\$160.01
2483 012	Ampek Company	380 West Portal Ave Ste G	\$2,035.70	\$169.64
2988A032	Bacciocco Enterprises Llc	290 West Portal Ave	\$6,079.83	\$506.65
3012 016	Balestrieri Family Revocable Tr	369 - 373 West Portal Ave	\$1,846.73	\$153.89
2979A026	Barbco Llc	41 - 47 West Portal Ave	\$1,791.38	\$149.28
2483 011	Basuino Joseph E & Ann M Trustees	372 West Portal Ave	\$1,497.10	\$124.76
3012 027	Beatty Marilee S Living Tr	393 West Portal Ave	\$3,313.96	\$276.16
2988A031	Burton D Goldstein Revoc Trust	130 - 140 West Portal Ave	\$2,087.69	\$173.97
2989B033	Chijan Living Trust	279 West Portal Ave	\$4,780.82	\$398.40
3012 024	Chouteau Walter C	301 - 309 West Portal Ave	\$4,702.37	\$391.86
2931 007	Choy Family Trust The	62 - 70 West Portal Ave	\$1,847.19	\$153.93
3012 022	Chung Enterprises Lp	323 - 325 West Portal Ave	\$1,137.07	\$94.76
3012 022A	Chung Enterprises Lp	319 - 321 West Portal Ave	\$1,140.12	\$95.01
2919 031	City Property	900 - 910 Ulloa St	\$5,362.62	\$446.89
2979A002	City Property	Parking Lot	\$898.26	\$74.86
2979A034	City Property	819 V	\$3,697.84	\$308.15
2988A007	City Property	174 - 180 West Portal Ave	\$1946.23	\$162.19
2989B027A	Dagemmijan, Arthur A	163-167 West Portal Ave	\$938.44	\$78.20
2979 013	Donahue Richard C & Pamela C	840 - 850 Ulloa St	\$1044.38	\$87.03
2988A013	Edwin R & Susan Rosenberg Revoc T	240 - 244 West Portal Ave	\$1479.12	\$123.26
2931 004	Ehikian Bradley R.	32 West Portal Ave	\$939.81	\$78.32
2483 009	Eng 1990 Trust	360 West Portal Ave	\$1,994.99	\$166.25
3012 015	Espinosa Norma C Living Trust	377 West Portal Ave	\$1,708.45	\$142.37
2989B017	Fox Family Trust Bank Of America	299 West Portal Ave	\$5,041.14	\$420.10
2989B027	Fróba Revocable Trust 2003	169 - 173 West Portal Ave	\$938.82	\$78.24
3012 017	Galli Mildred D Trustee	361 - 365 West Portal Ave	\$1,856.17	\$154.68
2483 013	Glass Properties Lp	398 West Portal Ave	\$2,754.67	\$229.56
2989B032	Greenspan Family Trust	101 - 107 West Portal Ave	\$5,101.12	\$425.09
2979A027	Greenspan Henry & Hedwa Fam Tr	21 - 37 West Portal Ave	\$3,294.16	\$274.51
3012 023	Harbin West Hldgs Llc	311 - 317 West Portal Ave	\$1,922.76	\$160.23
2989B026	Harvey & Nancy Rogers Fmly Lp	179 - 183 West Portal Ave	\$1,877.33	\$156.44
2931 004A	Hau Family Tr	36 - 40 West Portal Ave	\$942.62	\$78.55
2988A013A	Hodge Beverly Jean	248 - 250 West Portal Ave	\$923.21	\$76.93
2988A003	Hsu Arthur C&Glendy M Trustees	118 - 126 West Portal Ave	\$1807.83	\$150.65
3012 021	Huffman Bert	331 West Portal Ave	\$1,009.59	\$84.13
2989B022	Kermani Eleanore	233 West Portal Ave	\$2,257.55	\$188.13
2989B028	Kwack Myung Sook	157 - 161 West Portal Ave	\$1,371.66	\$114.31
2483 002	Lamorinda Development & Inv	300 West Portal Ave	\$5,350.48	\$445.87
2931 003	Landa Laurence D Trust	24 - 30 West Portal Ave	\$2,242.33	\$186.86
2483 006	Lasa Ignacio D	330 West Portal Ave	\$1,497.10	\$124.76
2979A035	Lasa Ignacio D	1 West Portal Ave	\$2,582.70	\$215.23
2989B025	Lrs West Portal Investment Grp Llc	195 - 199 West Portal Ave	\$1,798.48	\$149.87
2989B031	Malouf Rodney	111 - 127 West Portal Ave	\$2,239.56	\$186.63

APN	Owner Name	Site Address	PARCEL ASSMT	MONTHLY ASSMT
2988A009	Mar Living Trust	190 - 198 West Portal Ave	\$4,265.10	\$355.43
2483 010	Mark & Helen Pasquini Properti	362 - 366 West Portal Ave	\$1,835.77	\$152.98
2483 007	Martinucci Family Trust	338 - 342 West Portal Ave	\$1,835.55	\$152.96
2483 008	Martinucci Family Trust	346 - 350 West Portal Ave	\$1,839.58	\$153.30
2979A033	Mary Virginia Beroldo Revoc Tr	819 - 823 Ulloa St	\$1,038.30	\$86.53
2979A024A	Mitchell Trust The	59 - 63 West Portal Ave	\$1,774.89	\$147.91
3012 028	Morehead Beaty S Living Tr	381 West Portal Ave	\$1,359.96	\$113.33
2931 008	Norack Betty J Exempt Trust	76 - 78 West Portal Ave	\$1,986.77	\$165.56
2989B023	Northshore Resources Vi Ltd Partnership,	201 - 225 West Portal Ave	\$1,877.33	\$156.44
2989B024	Northshore Resources Vi Ltd Partnership,	201 - 225 West Portal Ave	\$1,877.33	\$156.44
2979A021A	Olson Susan M	99 West Portal Ave	\$3,453.18	\$287.77
2979A019	Patricia O Shapiro 2006 Tr	75 - 91 West Portal Ave	\$7,743.38	\$645.28
2979A023C	Pedro A F & Madeleine Galletti Revoc Tr	69 West Portal Ave	\$971.06	\$80.92
2979 013A	Recreation And Park Department	Muni Station/ Park	\$7,485.52	\$623.79
2988A008	Roher Martin S & Anne	186 West Portal Ave	\$1,287.71	\$107.31
2989B021	Sallaberry, George Sarnowski Yv	243 - 255 West Portal Ave	\$1,877.33	\$156.44
2988A005	Sapone John Exempt Marital Tru	150 - 156 West Portal Ave	\$1,445.58	\$120.47
2931 006	Schainsinger Family Trust 1989	54 - 60 West Portal Ave	\$1,903.81	\$158.65
2979 012	Shim Tom J & In Soon	820 - 824 Ulloa St	\$1,125.29	\$93.77
2931 005	Stratigos Theodore G	44 - 50 West Portal Ave	\$1,744.45	\$145.37
2483 004	Sugrue Family Charitable Trust	312 - 318 West Portal Ave	\$1,801.53	\$150.13
2988A001	Survivors Trust	101 Vicente St	\$5,466.34	\$455.53
2988A014	Thompson Giusti Properties	260 West Portal Ave	\$1,777.60	\$148.13
2988A012	Tobriner Rosabelle R & Tobrine	230 - 238 West Portal Ave	\$1,295.54	\$107.96
2988A011	Totah John B&Sellweh M 1989 Rev Tr	220 - 226 West Portal Ave	\$1,827.33	\$152.28
2483 005	Villafuerte, Richard M	320 - 328 West Portal Ave	\$1,835.55	\$152.96
2931 009	Washington Mutual Bank	98 West Portal Ave	\$1,924.99	\$160.42
2931 010	Washington Mutual Bank	98 West Portal Ave	\$4,561.03	\$380.09
2979 052	West Portal Mobil	800 Ulloa St	\$2,046.54	\$170.55
2931 001	Westportal Lic	2 West Portal Ave	\$3,995.09	\$332.92
2931 002	Westportal Lic	16 West Portal Ave	\$1,850.16	\$154.18
2989B034	Wfc Holdings Corp.	145 West Portal Ave	\$3,898.41	\$324.87
2979A029	William A Siskin Exemption Tr	7 - 15 West Portal Ave	\$2,296.81	\$191.40
3012 029	Wipf Family Exemption Trust	379 West Portal Ave	\$1,298.50	\$108.21
2988A006	Wong Ying-Wood	170 West Portal Ave	\$2,501.34	\$208.45
3012 020	Yang Chi-Kuo & Lee Chen	335 - 337 West Portal Ave	\$1,011.12	\$84.26
3012 020A	Yang Chi-Kuo & Lee Chen	339 - 341 West Portal Ave	\$1,140.12	\$95.01
3012 021A	Zhao/Zheng Family Tr	327 - 329 West Portal Ave	\$1,140.12	\$95.01
TOTAL:			\$198,000.00	

Fillmore CBD Renewal Petitions In Favor (YES)

Block #	Parcel	Weight	\$
2483	5	0.93	1835.55
2931	4	0.47	939.81
2931	6	0.96	1903.81
2931	8	1	1986.77
2931	9	0.97	1924.99
2931	10	2.3	4561.03
2979A	21A	1.74	3453.18
2979A	23C	0.49	971.06
2979A	26	0.9	1791.38
2979A	29	1.16	2296.81
2988A	1	2.76	5466.34
2988A	8	0.65	1287.71
2988A	9	2.15	4265.10
2988A	12	0.65	1295.54
2988A	13	0.75	1479.12
2988A	13A	0.47	923.21
2989B	21	0.95	1877.33
2989B	26	0.95	1877.33
2989B	27	0.47	938.82
2989B	33	2.41	4780.82
2989B	34	1.97	3898.41
3012	16	0.93	1846.73
3012	17	0.94	1856.17
3012	18	1.18	2342.87
3012	19	1.09	2151.61
3012	21	0.51	1009.59
3012	22	0.57	1137.07
3012	22A	0.58	1140.12
Total		30.90	\$ 61,238.28

Fillmore CBD Renewal Petition Results

Opposed

Block #	Parcel	Weight
2483	2	2.7
2483	7	0.93
2483	8	0.93
2483	10	0.93
2483	11	0.76
2931	1	2.02
2931	2	0.93
2931	3	1.13
2931	5	0.88
2979	12	0.57
2979	13	0.53
2979A	24A	0.9
2979A	25	0.97
2979A	27	1.66
2979A	31	1.07
2988A	3	0.91
2988A	11	0.92
2988A	32	3.07
2989B	22	1.14
2989B	23	0.95
2989B	24	0.95
2989B	25	0.91
2989B	27A	0.47
2989B	32	2.58
3012	20	0.51
3012	20A	0.58
3012	23	0.97
3012	29	0.66
Total		31.53

No Votes Cast

Block #	Parcel	Weight
2483	4	0.91
2483	6	0.76
2483	9	1.01
2483	12	1.03
2483	13	1.39
2919	31	2.71
2931	4A	0.48
2931	7	0.93
2979	13A	3.78
2979	52	1.03
2979A	2	0.45
2979A	19	3.91
2979A	33	0.52
2979A	34	1.87
2979A	35	1.3
2988A	5	0.73
2988A	6	1.26
2988A	7	0.98
2988A	14	0.9
2988A	31	1.05
2989B	17	2.55
2989B	28	0.69
2989B	31	1.13
3012	15	0.86
3012	21A	0.58
3012	24	2.37
3012	27	1.67
3012	28	0.69
Total		37.54

**PETITION TO THE SAN FRANCISCO BOARD OF SUPERVISORS
TO ESTABLISH THE
WEST PORTAL COMMUNITY BENEFIT DISTRICT**

1. We are the owner(s) of property, or are authorized to represent the owners(s), within the proposed special assessment district to be named the "**WEST PORTAL COMMUNITY BENEFIT DISTRICT**" (hereafter "West Portal CBD" or "District"), the boundaries of which are shown on the attached map and in the Management District Plan for the Excelsior CBD (hereafter "Plan").

2. We are or represent the persons and/or entities that would be obligated to pay the special assessments for the improvements and activities described in the Plan if the proposed District is approved by the Board of Supervisors following the ballot election and public hearing.

3. We petition the Board of Supervisors to initiate special assessment proceedings in accordance with applicable state and local laws (California Streets and Highways Code Sections 36600 *et seq.* "Property and Business Improvement District Law of 1994" as augmented by City and County of San Francisco Business and Tax Regulation Code Article 15 "Business Improvement District Procedure Code").

4. We understand that upon receipt of this petition signed by property owners who will pay more than thirty percent (30%) of the proposed assessments, the Board of Supervisors may initiate proceedings to authorize the District. These proceedings will include a balloting of property owners under which a majority of weighted property owners who return a ballot will authorize the establishment of the district.

Assessor Parcel Number (APN): 2483 002

Street Address: 300 WEST PORTAL AVE

Proposed Annual Assessment: \$6,688.09

Owner Percent of Total Assessment: 2.70%

Legal Owner Contact Information: LAMORINDA DEVELOPMENT & INV

Yes, I petition the Board of Supervisors to initiate special assessment proceedings.

No, I do not petition the Board of Supervisors to initiate special assessment proceedings.

Carol J. Haymesch
Signature of Owner or Authorized Representative

7/28/09
Date

CAROL J. Haymesch, VP
Print Name of Owner or Authorized Representative

for Lamorinda Development

PLEASE **RETURN BY JULY 31, 2009** TO:

fax (415) 681-0203; email: matt@papenhausen.com; or use the enclosed self-addressed envelope.

Please contact Matt Rogers at (415) 215-2094 to request copies of the CBD Management District Plan or for more information about the CBD.

