



OCEAN AVENUE
ASSOCIATION

**2012-2013 Annual Report and
2013-2014 Services Plan**

OCEAN AVENUE ASSOCIATION (OAA) Annual Report

Narrative of Work Performed FY 2012-13

This is the second Annual Report for the Ocean Avenue Community Benefits District submitted by the Ocean Avenue Association. The OACBD was formed in December 2010. During its first full fiscal year, July 1 2010 through June 30, 2011, the OAA received assessment revenue, but did not commence active operations until July 2011, and did not submit an annual report for its first fiscal year because it provided no services. (The OAA anticipates that its contract with the City will be amended to exempt the OAA from the filing requirement for its first fiscal year.)

Public Rights of Way and Sidewalk Operations; Public Safety

Cleaning and Public Realm Management services are provided by 2 CleanScapes staff members 5 days a week, 1 staff member on Saturdays and a weekly walk through with the Supervisor. The services they perform include

- Sweeping sidewalks and Muni-boarding islands.
- Graffiti removal within 24 hours of notification.
- Regularly scheduled steam cleaning sidewalks and Muni-boarding islands.
- Spot pressure washing.
- Topping off city trash cans.
- Weeding tree wells.
- Watering newly planted trees.
- Painting city poles.
- Removal of illegally posted notices on poles and other street furniture.
- Wiping down street furniture.
- Reporting and monitoring removal of items illegally deposited on the public right-of-way.

The OAA continued working with San Francisco Safe to address safety issues impacting businesses within the district and continued the formation work for an Ocean Avenue Business Watch. The Public Safety Committee meets monthly to recruit new business for the watch.

The Executive Director reports incidents and other information to the Ingleside and Taraval Police Districts or 911 as they occur. OAA worked with the Ingleside police district to deal with the pedestrian bridge public safety districts and with the Taraval district to deal with a spate of glass window and door breakages in the retail area of the district.

District Identity and Streetscape Improvements

- Continued working with Lowercase Productions to develop the OAA website.
- Partnered with Friends of the Urban Forest to plant 26 new trees on or near the Ocean Avenue CBD in March.
- Developed an outline to prepare a Fifteen Year Plan for Improvements of the Ocean Avenue corridor and sought support for this community planning effort through the Streets Repaving Bond Issue allocation for Ocean Avenue.
- Worked with volunteers from the Lick-Wilmerding Women's Varsity Basketball Team and other volunteers to hang holiday decorations on the Ocean Avenue palm trees.
- Pruned all trees in the corridor, on or near to Ocean Avenue, except the large palms which DPW pruned for the final time in 2012. Arborist Now is our tree maintenance contractor.

- Applied with Friends of the Urban Forest and won a \$10,000 city grant for sidewalk gardens along the corridor. Installation is scheduled for October.
- Applied for a Mayor's Office of Economic and Workforce Development Community Development Block Grant for 2013-2014. Awarded \$30,000 for business technical assistance, focusing on small business façade improvements.
- Won an SF Shines grant award of \$100,000 to provide up to 10 small businesses on the corridor with façade improvements. OAA staff time will be covered by the Block Grant.
- The Street Life Committee meets monthly to discuss and plan streetscape improvements and marketing events in the district.
- OAA is committed to economic vitality; the board supports growing our existing small businesses and attracting new businesses to the district. Successes include:
 - Working with OEWD to attract Champa Garden, YogurtLand and Sherwin Williams to Ocean Avenue.
 - Providing additional resources to existing small businesses through the SF Shines program.

Administrative and Corporate Operations

- Ensure functioning of CBD and compliance with City contract and management plan.
- Work on organizational development issues including long-term goals for the CBD.
- Apply for grants to bring additional resources to the CBD.
- Ensure compliance with the California Brown Act in noticing and conducting our meetings.
- Collaborate with residential and other community organizations to address issues in the community and raise awareness about the improvements on Ocean Avenue.
- Monitor contracts and services. Assist contractors in problem solving as is necessary.
- Develop a website, neighborhood newspaper, and online social media branding campaign.
- Increase and improve upon communication between CBD Board and property owners.
- Publish CBD Mid-Year Report and Annual Report.
- Continue as active participants of the San Francisco CBD/BID Consortium.
- Support all committees of the Board of Directors including Street Life and Public Safety.
- Work with the City on quality of life issues.

Fundraising

- *Total funds raised through outside dollars, in-kind services and volunteer services since the last Annual Report, \$140,000.*
- *The CBD also raised and distributed \$15,000 to assist the 8 small businesses impacted by the August 2012 Ocean Ave. fire.*
- In-kind donations include office space, electricity, internet from Lick Wilmerding High School at 31 Howth Street \$400/month x 12 months = \$4,800
- Total of 6 hrs of volunteer service provided by 20 volunteers on December 2012 at a value of \$14/hr. = \$2,240. Total of 4 hours of volunteer services provided by 50 volunteers at the FUF March tree planting = \$2,800.

Ocean Avenue Association (OAA) Services Plan for FY 2013-14

Public Rights of Way and Sidewalk Operations

- CleanScapes will continue to provide cleaning and graffiti removal services for the OAA. Services provided include 2 CleanScapes workers covering the district 5 days a week and one worker on Saturday. The services they perform include:
 - Sweeping sidewalks and public plazas and maintaining an inviting environment in the district.
 - Graffiti removal within 24 hours of notification.
 - Regularly scheduled pressure washing of sidewalks and Muni-boarding islands.
 - Spot pressure washing.
 - Topping off city trash cans.
 - Weeding tree wells.
 - Painting city poles and other street furniture.
 - Reporting and monitoring pick-up large items deposited on the sidewalk as trash.

Public Safety Services

- The OAA will continue to organize Ocean Avenue Business Safe, working with SF SAFE and continue to work with the San Francisco Police Department.
- OAA will address other security/safety issues that may arise.

District Identity and Streetscape Improvements

- OAA Board will develop its fifteen year improvement plan, working with DPW.
- Continue to work with DPW on the installation of pedestal news racks throughout the district to replace the existing news racks.
- Work with MTA, PUC and community groups on the Phelan and Ocean Community Garden and provide feedback regarding the Phelan Loop project.
- Maintain the existing 80 OAA banners throughout the district, remove the existing frayed banners when necessary.
- Encourage, help to fund and participate in marketing efforts to develop district identity such as the Ocean Avenue Festival in September, the March 2013 tree planting, and so forth.

Administrative and Corporate Operations

- Ensure functioning of CBD and compliance with City contract and management plan.
- Work on organizational development issues including long term goals for the CBD. Work on fundraising activities that bring additional, outside resources to the CBD.
- Ensure compliance with the California Brown Act.
- Monitor contracts and services. Assist contractors in problem solving as is necessary.
- Continue to update website.
- Increase and improve upon communication between CBD Board and property owners.
- Publish CBD Annual Report.
- Continue as active member of CBD/BID Consortium.
- Support all working committees of the Board of Directors including: Streetscape, Services, Board Development, Executive, and Finance.
- Work with the City on quality of life issues.

Description of Changes to the District Boundaries, Parcels or Assessment Calculations

- No parcels were reassessed in 2012-13.
- The assessment was raised 2.4% for FY 2013-14 to account for cost of living increases calculated by the City, and applied for the first time by OAA.
- The proposed annual budget, including a cost estimate of providing the improvements and activities for 2013/14 Fiscal Year, is shown on the following pages.
- There are no proposed changes in the boundaries of the improvement district or in any benefit zones or classification of property or businesses within the district.
- The method and basis of levying the assessment in sufficient detail to allow each real property or business owner to estimate the amount of the assessment to be levied against his or her property for that fiscal year is presented below.
- The amount of surplus or deficit revenues to be carried over from a previous fiscal year is \$82,045.24, from unpaid assessments for years i-iii.
- The contributions made other than assessments levied for 2012-13 are CDBG Grant funds- \$12,149.41, and funds donated to the CBD for distribution to fire victims, \$15,000.

Assessment Calculations

Zone 1 Assessment Calculation Rates

Zone 1 – Assessment Category Description	2010-2013 Rate	2013/14 Rate
Linear Street Foot for Commercial Property Use, Residential Property Use, Public Property Use, and Phelan Loop Parcel	\$26.28 per linear street foot	\$26.91 per linear street foot
Linear Street Foot for Non-Profit Service Organization Property Use, and Religious Institutional Property Use	\$21.00 per linear street foot	\$21.50 per linear street foot
Building Square Foot for Commercial Property Use	\$0.1110 per building square foot	\$0.1136 per building square foot
Lot Square Foot for Commercial Property Use	\$0.0276 per lot square foot	\$0.0282 per lot square foot
Lot Square Foot for Phelan Loop Corner Landscaped Parcel	\$1.31 per lot square foot	\$1.34 per lot square foot
Lot Square Foot for Phelan Parcels Fronting and Accessed off of the Phelan Plaza	\$0.0574 per lot square foot	\$0.0587 per lot square foot

Zone 1 Annual Assessment Calculation:

Linear Street Frontage Assessment	=	Assigned Linear Street Frontage	x	Linear Street Frontage Assessment Rate
Building Square Footage Assessment	=	Commercial Property Use Building Square Footage	x	Building Square Footage Assessment Rate
Lot Square Foot Assessment	=	Commercial Property Use Lot Square Footage	x	Lot Square Footage Assessment Rate

Zone 1 Assessor's Parcel Annual Assessment:

$$\text{Assessor's Parcel Annual Assessment} = \text{Linear Street Frontage Assessment} + \text{Building Square Footage Assessment} + \text{Lot Square Footage Assessment}$$

Zone 1 Phelan Loop Parcel Annual Assessment:

$$\text{Phelan Loop Parcel Annual Assessment} = \text{Assigned Linear Street Frontage} \times \text{Linear Street Frontage Assessment Rate} + \text{Assigned Lot Square Footage} \times \text{Lot Square Footage Assessment Rate}$$

Zone 2 Assessment Calculation Rates

Zone 2- Assessment Category Description	2010-2013 Rate	2013/14 Rate
Linear Street Foot for Educational Institutional Property Use and Public Property Use	\$13.90 per Linear Street Foot	\$14.23 per Linear Street Foot

Zone 2 Annual Assessment Calculation:

$$\text{Linear Street Frontage Assessment} = \text{Linear Street Frontage} \times \text{Linear Street Frontage Assessment Rate}$$

Zone 2 Assessor's Parcel Annual Assessment:

$$\text{Assessor's Parcel Annual Assessment} = \text{Linear Street Frontage Assessment}$$

Maximum Annual Assessments

The Zone 1 Fiscal Year 2013/14 maximum annual assessment rates are as follows:

- Per Linear Street Foot (Commercial Property Use, Residential Property Use, Public Property Use, and Phelan Loop Parcel): \$26.91
- Per Linear Street Foot for (Non-Profit Service Organization Property Use, and Religious and Institutional Property Use): \$21.50
- Per Commercial Property Use Building Square Foot: \$0.1136
- Per Commercial Property Use Lot Square Foot: \$0.0282
- Per Phelan Loop Parcel Lot Square Foot: \$1.34

The Zone 2 Fiscal Year 2013/14 maximum annual assessment rate is as follows:

- Per Linear Street Foot (Educational Institutional Property Use and Public Property Use): \$14.23

**Ocean Avenue Association
Budget for FY July 1, 2013 - June 30, 2014
(Year 4)**

**Year IV
Budget Rev#1
7-1-13**

INCOME	BUDGET	ACTUAL (as of 7/1/13)	VARIANCE
Assessment Revenue			
Current Year Assessment	253,034.00	0.00	-253,034.00
Prior Year(s) Assessment	82,045.24	0.00	-82,045.24
Prior Year(s) Assessment Refund	0.00	0.00	0.00
Subtotal Assessment Revenue	335,079.24	0.00	-335,079.24
Other Revenue			
Donations	2,530.00	0.00	-2,530.00
Fees (Fiscal Sponsorship, Other)	0.00	0.00	0.00
Fiscal Sponsorship Pass Through-McCoppin TBD	0.00	0.00	0.00
Fundraisers	0.00	0.00	0.00
Prior Year(s) Other Revenue	840.00	0.00	-840.00
Subtotal Other Revenue	3,370.00	0.00	-3,370.00
Grants			
Grants-Government (CDBG 8/2013)	30,000.00	0.00	-30,000.00
Grants-Government	0.00	0.00	0.00
Grants-Corporate	0.00	0.00	0.00
Grants-Foundations	0.00	0.00	0.00
Subtotal Grants	30,000.00	0.00	-30,000.00
Operating Reserve			
Carryover Net Income from FY 12-13	219,517.53	219,517.53	0.00
Carryover Other Income from FY 12-13	0.00	0.00	0.00
Subtotal Operating Reserve	219,517.53	219,517.53	0.00
Total Income	587,966.77	219,517.53	-368,449.24

**Ocean Avenue Association
Budget for FY July 1, 2013 - June 30, 2014
(Year 4)**

**Year IV
Budget Rev #1
7-1-13**

EXPENSES	BUDGET	ACTUAL (as of 7/1/13)	VARIANCE	MDP BUDGET RATIO
Management & Operations (M&O)				
Executive Director Salary	43,000.00	0.00	43,000.00	
Payroll Taxes	4,000.00	0.00	4,000.00	
Payroll Processing Fees	1,020.00	0.00	1,020.00	
<i>Subtotal of M&O Payroll</i>	<u>48,020.00</u>	<u>0.00</u>	<u>48,020.00</u>	
Accounting Fees	5,000.00	0.00	5,000.00	
Bookkeeping Fees	3,000.00	0.00	3,000.00	
Legal Fees (Gin)	5,000.00	0.00	5,000.00	
Office Supplies	3,500.00	0.00	3,500.00	
Printing, Copying, Postage & Mailing Services	500.00	0.00	500.00	
Telephone, Telecom, Meeting Expense, Other	750.00	0.00	750.00	
Licenses, Permits, Filing Fees	500.00	0.00	500.00	
Insurance - Liability, D&O	3,000.00	0.00	3,000.00	
Workers Compensation Insurance	500.00	0.00	500.00	
Dues and Subscriptions	500.00	0.00	500.00	
Annual Report Expenses	1,600.00	0.00	1,600.00	
Assessment Role Updating	1,000.00	0.00	1,000.00	
<i>Subtotal of M&O Non Payroll</i>	<u>24,850.00</u>	<u>0.00</u>	<u>24,850.00</u>	
Subtotal M&O	72,870.00	0.00	72,870.00	25.3%
Cleaning, Maintenance, & Safety				
Sanitation and Graffiti Removal	115,000.00	0.00	115,000.00	
Maintenance	29,000.00	0.00	29,000.00	
Security	2,000.00	0.00	2,000.00	
Subtotal Cleaning & Maintenance	146,000.00	0.00	146,000.00	50.6%
Marketing & Beautification				
Graphic Designer	750.00	0.00	750.00	
Website Designer	2,000.00	0.00	2,000.00	
Photography	600.00	0.00	600.00	
Beautification-Summer Social Parklet	1,500.00	0.00	1,500.00	
Holiday Decorations	1,500.00	0.00	1,500.00	
Webhosting	1,000.00	0.00	1,000.00	
Printing and Copying	1,000.00	0.00	1,000.00	
Advertising & Marketing	5,000.00	0.00	5,000.00	
Special Events (Ocean Ave Festival)	5,500.00	0.00	5,500.00	
Grants to Other Organizations	3,000.00	0.00	3,000.00	
Streetscape Improvements - Phelan Garden	500.00	0.00	500.00	
Streetscape Improvements - Benches	9,220.00	0.00	9,220.00	
Other Streetscape Improvements	7,000.00	0.00	7,000.00	
Other Marketing & Beautification	15,000.00	0.00	15,000.00	
Landscape Improvements	2,000.00	0.00	2,000.00	
Subtotal Marketing & Beautification	55,570.00	0.00	55,570.00	19.3%
Contingency & Reserves				
Contingency and Reserves	14,000.00	0.00	14,000.00	
Bank Deficit Analysis	0.00	0.00	0.00	
Subtotal Contingency & Reserves	14,000.00	0.00	14,000.00	4.9%
Supplemental Non-OAA Expenses				
Executive Director Salary (OEWD Grant)	27,000.00	0.00	27,000.00	
Payroll Taxes	3,000.00	0.00	3,000.00	
<i>Subtotal of Supplemental Payroll</i>	<u>30,000.00</u>	<u>0.00</u>	<u>30,000.00</u>	
Facade Projects-SF Shines TBD	0.00	0.00	0.00	
Other Projects TBA	0.00	0.00	0.00	
<i>Subtotal of Grant Expenses</i>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	
Fiscal Sponsorship Pass-Through Exp. (McCoppin)	0.00	0.00	0.00	
<i>Subtotal of Fiscal Sponsorship</i>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	
Subtotal Supplemental Non-OAA Expenses	30,000.00	0.00	30,000.00	
Total OAA Expenses	288,440.00	0.00	288,440.00	100.0%
Net OAA Income*	299,526.77	219,517.53	80,009.24	
Net Income/Cash Balance**	269,526.77	219,517.53	50,009.24	

* Total Income less Total OAA Expenses

** Total Income less Total OAA Expenses plus Subtotal Supplemental Non-OAA Expenses.