

PROPERTY BUSINESS IMPROVEMENT
DISTRICT ANNUAL REPORT CHECKLIST

FY _____

PBID NAME: _____ CONTRACT # _____

AUTHORITY (CS&H Code Section)	REQUIREMENT	PAGE FOUND
36650(b)	Specify PBID name	
-Does the PBID name exactly match the previous year's PBID name? (Check one) YES NO		
36650(b)	Specify fiscal year to which report applies	
36650(b)(1)	Any proposed changes in the boundaries	
36650(b)(1)	Any proposed changes in any benefit zones	
-Do the boundaries and benefit zones exactly match the previous year? (Check one) YES NO (If not, describe change(s) in the NOTES section)		
36650(b)(2)	The improvements and activities for that fiscal year	
-Are the improvements and activities in line with the Original MDP? (Check one) YES NO		
36650(b)(3)	An estimate of the cost of providing the improvements and activities for that fiscal year	
- How does the overall budget compare to last year? (Check one) HIGHER SAME LOWER - What is the greatest change (by percentage) between line items from last year to this year _____		
36650(b)(4)	The method of levying the assessment in sufficient detail to allow each real property owner to estimate the amount of the assessment to be levied against his or her property for that fiscal year	
36650(b)(4)	The basis of levying the assessment in sufficient detail to allow each real property owner to estimate the amount of the assessment to be levied against his or her property for that fiscal year	
-Does the Method and Basis match the MDP? (Check one) YES NO -Is there a CPI increase for this year? (Check one) YES NO - If so: What is the rate? _____		
36650(b)(5)	The amount of any surplus revenues to be carried over from a previous fiscal year	
-Is the surplus identified for use in specific categories? (Check one) YES NO if yes, What category(ies) _____		
36650(b)(5)	The amount of any deficit revenues to be carried over from a previous fiscal year	
36650(b)(6)	The amount of any contributions to be made from sources other than assessments levied pursuant to this part	
-Are the contributions identified for use in a specific category? (Check one) YES NO		
-Did an authorized representative of the nonprofit Board sign the report? (Check one) YES NO		
-Does the report state the date the Board approved the Report/Budget? (Check one) YES NO		

NOTES:

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April 26, 2023

Susanne Tam
City of Sacramento
Finance Department
915 I Street, 5th Floor
Sacramento, CA 95814

Dear Ms. Tam:

Attached you will find the FY 2023-24 Annual Report for the Oak Park Property and Business Improvement District (OPPBID). This report outlines our Budget, Service Plan and Assessment Recommendations for the coming Fiscal Year 2023/24.

I have included a budget summary for the district as outlined in the Management District Plan (MDP), which was adopted in 2016. The first assessments were distributed to the district in 2017. The Board of Directors increased the assessment four years ago, but have not elected to increase the assessment since that time. A summary table of the assessment calculation and estimated revenues (for the duration of the new district) is included in this report.

The projects and programs in the new MDP are consistent with those outlined in the previous plan, with some minor adjustments to the allocations. The OPPBID will continue to actively manage safety and security programs, as well as maintenance and economic development efforts. A detailed, annual budget is reviewed at two consecutive Board meetings and it was unanimously approved by the Board of Directors on November 9, 2022.

We look forward to sharing successes in the coming year. Thank you for your continued support and guidance.

Sincerely,

A handwritten signature in black ink, appearing to read 'Seann Rooney', with a stylized flourish at the end.

Seann Rooney
Executive Director

Attachments

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Fiscal Year 2023/24

ANNUAL REPORT AND BUDGET ESTIMATES

The Oak Park Property and Business Improvement District (OPPBID) renewed for an additional 10-year term in the Summer 2016. At the conclusion of the renewal process the organization made some administrative changes, but the Board continues to focus Image Enhancement, Safety, Security, Maintenance and Special Events.

The assessment methodology is based on parcel size, type and benefit zone.

	Rate	
Parcel Type	Zone 1	Zone 2
Standard	\$0.149375	\$0.050181
Public Housing	\$0.072100	\$0.072100
Private Tax-Exempt	\$0.038213	\$0.012226

The prospective assessment schedule (pending board action to increase annual assessments), as outlined in the Management District Plan (MDP), was as follows:

Year	Maintenance, Security & Infrastructure	Contingency, Advocacy & Administration	Image Enhancement	Total Budget
2017	\$211,130.77	\$79,973.78	\$28,790.56	\$319,895.10
2018	\$217,464.69	\$82,372.99	\$29,654.28	\$329,491.95
2019	\$223,988.63	\$84,844.18	\$30,543.90	\$339,376.71
2020	\$230,708.29	\$87,389.50	\$31,460.22	\$349,558.01
2021	\$237,629.54	\$90,011.19	\$32,404.03	\$360,044.75
2022	\$244,758.42	\$92,711.52	\$33,376.15	\$370,846.10
2023	\$252,101.18	\$95,492.87	\$34,377.43	\$381,971.48
2024	\$259,664.21	\$98,357.66	\$35,408.76	\$393,430.62
2025	\$267,454.14	\$101,308.39	\$36,471.02	\$405,233.54
2026	\$275,477.76	\$104,347.64	\$37,565.15	\$417,390.55

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The property owners in the OPPBID have approved the following budget for FY 2023/24 (detailed worksheets used by the Board of Directors to outline program allocations are not shown in this report):

Service	Percentage	Zone 1	Zone 2
Maintenance, Security & Infrastructure	66%	\$141,146.17	\$72,711.66
Contingency, Advocacy & Admin	25%	\$53,464.49	\$27,542.31
<u>Image Enhancement</u>	<u>9%</u>	<u>\$19,247.22</u>	<u>\$9,915.22</u>
Sub-Total (Zone)	100%	\$213,857.88	\$110,169.20
Total Annual Budget			\$324,027.08

Note: totals have been rounded in calculation

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Total Assessment (Calculated by APN)

APN	AMOUNT
0100251020000	\$2,294.40
01002520190000	\$1,732.74
01002520200000	\$1,912.00
01002520210000	\$4,932.36
01002540200000	\$3,340.76
01002550010000	\$1,041.14
01002550020000	\$954.50
01002550030000	\$954.50
01002550160000	\$4,003.24
01003010090000	\$1,350.44
01003010140000	\$1,078.48
01003030030000	\$691.90
01003030040000	\$1,723.48
01003030050000	\$967.94
01003040020000	\$862.64
01003040030000	\$1,729.00
01003040090000	\$1,344.36
01003040110000	\$2,307.84
01003060080000	\$586.94
01003060090000	\$249.68
01003060110000	\$2,078.44
01003060140000	\$978.24
01003070010000	\$187.80
01003080010000	\$890.26
01003080040000	\$429.30
01003080050000	\$303.22
01003080060000	\$707.44
01003080140000	\$18.66
01003080150000	\$856.50
01003080160000	\$1,405.46
01003120010000	\$2,084.08
01003120150000	\$10,410.84
01003130010000	\$185.36
01003150010000	\$478.00
01003150020000	\$1,314.50
01003150110000	\$896.24

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01003150120000	\$896.24
01003150160000	\$896.24
01003150170000	\$896.24
01003150180000	\$896.24
01003220170000	\$896.24
01003220180000	\$896.24
01003220190000	\$896.24
01003220210000	\$836.50
01003220250000	\$1,519.28
01003730020000	\$298.74
01003730030000	\$883.24
01003730040000	\$896.24
01003730080000	\$722.96
01003730170000	\$1,831.00
01003730180000	\$1,434.00
01003740020000	\$120.74
01003740080000	\$650.66
01003740090000	\$1,106.10
01003740150000	\$455.44
01003740170000	\$1,604.94
01003750050000	\$910.88
01003750060000	\$896.24
01003750090000	\$476.64
01003750100000	\$420.78
01003760010000	\$780.78
01003760020000	\$548.04
01003760050000	\$582.10
01003770010000	\$842.88
01003770020000	\$896.24
01003770030000	\$896.24
01003770110000	\$896.24
01003770140000	\$896.24
01003770170000	\$1,794.44
01003770180000	\$3,492.08
01003810010000	\$1,366.48
01003810070000	\$229.26
01003810080000	\$242.60
01003810110000	\$233.02
01003810190000	\$859.26
01003820010000	\$672.92
01003820020000	\$588.22
01003820030000	\$754.64

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01003820040000	\$973.76
01003820050000	\$715.80
01003820060000	\$381.34
01003830030000	\$761.20
01003830120000	\$1,853.28
01003830130000	\$1,523.62
01003830140000	\$1,232.78
01003850050000	\$910.88
01003850120000	\$896.24
01003850140000	\$1,309.86
01003850150000	\$1,073.24
01004200060000	\$1,478.66
01004200070000	\$880.26
01004200150000	\$663.66
01004200170000	\$302.62
01004200180000	\$339.22
01004200190000	\$197.92
01004200200000	\$185.82
01004200210000	\$161.46
01004200220000	\$161.32
01301330200000	\$196.70
01301330210000	\$131.16
01301330220000	\$109.28
01301330250000	\$3,563.00
01301360010000	\$175.62
01301360050000	\$87.40
01301360150000	\$10,579.66
01301410040000	\$961.96
01301410050000	\$841.72
01301410060000	\$1,055.62
01301410070000	\$455.44
01301410080000	\$520.56
01301410090000	\$910.88
01301410100000	\$826.04
01301410130000	\$696.20
01301410140000	\$558.62
01301420110000	\$219.82
01301420120000	\$648.90
01301420130000	\$677.44
01301420260000	\$458.88
01301420370000	\$4,773.80
01301420380000	\$1,344.36

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01301420390000	\$792.04
01301420400000	\$490.26
01301420410000	\$383.92
01301430040000	\$418.24
01301430080000	\$896.24
01301430300000	\$125.58
01301430310000	\$1,792.50
01301430320000	\$896.24
01301430380000	\$8,165.74
01301430390000	\$229.30
01301510030000	\$373.28
01301510040000	\$455.44
01301510050000	\$1,805.94
01301520010000	\$1,540.92
01301520060000	\$1,431.46
01301520070000	\$1,172.88
01301530010000	\$478.00
01301530130000	\$337.60
01301530140000	\$467.90
01301530170000	\$56.54
01301530180000	\$520.56
01301530410000	\$345.28
01301530450000	\$455.44
01301530480000	\$2,868.00
01301530490000	\$394.94
01301530500000	\$1,561.56
01301540310000	\$983.92
01301540330000	\$4,388.32
01302430430000	\$9,399.30
01302440270000	\$9,202.58
01302510010000	\$33,225.44
01302510020000	\$1,366.48
01302510050000	\$183.10
01302510090000	\$183.42
01302510100000	\$715.80
01302510110000	\$715.80
01302510270000	\$550.26
01302510280000	\$736.70
01302830480000	\$2,317.04
01302910300000	\$1,874.10
01302920030000	\$322.10
01303010130000	\$581.06

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01303540060000	\$845.90
01303540070000	\$845.90
01303540080000	\$875.78
01303540090000	\$659.92
01303540100000	\$743.58
01303540110000	\$98.34
01303540120000	\$249.80
01303540130000	\$249.80
01303540140000	\$249.80
01303540150000	\$87.40
01303540160000	\$126.44
01303550070000	\$478.92
01303550080000	\$109.28
01303550090000	\$291.90
01401310240000	\$443.26
01401310270000	\$1,490.76
01401310310000	\$845.90
01401320010000	\$29,280.48
01401320160000	\$520.56
01401320170000	\$550.58
01401410510000	\$611.02
01401410520000	\$1,292.88
01401710140000	\$484.86
01401710240000	\$1,264.30
01401710270000	\$2,667.50
01401720010000	\$252.34
01401720280000	\$806.62
01401720290000	\$537.74
01401720300000	\$612.40
01401720310000	\$1,163.62
01401730010000	\$909.98
01401730180000	\$695.62
01401740160000	\$652.76
01401740170000	\$780.78
01402020020000	\$437.16
01402020030000	\$6,164.18
01402020160000	\$1,158.52
01402020170000	\$306.00
01402020180000	\$174.88
01402020190000	\$677.64
01402020200000	\$590.16
01402020210000	\$502.76

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01402020220000	\$918.06
01402020230000	\$568.34
01402020240000	\$708.20
01402020250000	\$507.78
01402020260000	\$359.78
01402020270000	\$196.70
01402020280000	\$197.90
01402020290000	\$413.24
01402020300000	\$284.16
01402020310000	\$349.76
01402020320000	\$344.74
01402020330000	\$284.16
01402020340000	\$240.86
01402020350000	\$240.86
01402020360000	\$331.18
01402020370000	\$284.16
01402020380000	\$218.58
01402020390000	\$240.46
01402310430000	\$6,426.46
01402310460000	\$12,612.54
<u>01402310490000</u>	<u>\$321.50</u>
Total	\$324,027.08