



AGENDA

REGULAR JOINT MEETING OF THE OAKLEY CITY COUNCIL/OAKLEY CITY COUNCIL ACTING AS THE SUCCESSOR AGENCY TO THE OAKLEY REDEVELOPMENT AGENCY AND SPECIAL MEETING OF THE OAKLEY PUBLIC FINANCING AUTHORITY

Tuesday, September 24, 2024

6:30 PM

Oakley City Council Chambers located at 3231 Main Street, Oakley, California 94561. Unless stated otherwise on the agenda, every item on the agenda is exempt from CEQA Guidelines Sections 15060(c), 15061(b)(3), 15273, 15378, 15301, 15323 and/or Public Resources Code Section 21065.

MISSION STATEMENT: The City of Oakley will create a resilient future that fosters and attracts a vibrant and evolving community that welcomes and values all people.

VISION STATEMENT: The City of Oakley celebrates our unique Delta lifestyle and small-town feel where we Live in a safe, dynamic community, **Work** together to build the future, and **Play** in our own backyard.

Agendas are posted in Oakley at Oakley City Hall-3231 Main Street, outside the gym at Delta Vista Middle School-4901 Frank Hengel Way and outside the Library at Freedom High School-1050 Neroly Road. Agendas are also posted on the City's Internet Website www.ci.oakley.ca.us.

A complete packet of information containing staff reports and exhibits related to each item is available for public review prior to an Oakley City Council and/or City Council Acting as the Successor Agency to the Oakley Redevelopment Agency/Oakley Public Financing Authority meeting at Oakley City Hall, 3231 Main Street, Oakley, CA 94561. Any writings or documents provided to a majority of the Oakley City Council, Oakley City Council Acting as the Successor Agency to the Oakley Redevelopment Agency or Oakley Public Financing Authority regarding any item on this agenda will be made available for public inspection, during regular business hours, at the front counter in the Main Lobby of the Oakley City Hall located at 3231 Main Street, Oakley, CA 94561. Agendas may be picked up at the Oakley City Hall located at 3231 Main Street, Oakley, CA 94561 for no charge. To request information regarding placement on the City's agenda e-mail distribution list, please contact us at (925) 625-7000.

The City of Oakley provides social media options to stay connected to City Hall through Facebook, Twitter, Next Door and Instagram. Other opportunities to connect with City Hall include Envision Oakley, Oakley OnDemand on the City's website, and by emailing info@ci.oakley.ca.us.

If you require special accommodation, please call the City Clerk's office at (925) 625-7000 before the meeting or contact City staff at the meeting.

Please keep cell phones/electronic devices turned off during the meeting. Please be advised that City Council meetings are video recorded and attendees may appear on video.

Information Regarding Public Comment

Members of the public may address the Council on items of interest that are within the City's jurisdiction. In compliance with State law, the council may not take action or have discussion on any item that is not specifically listed on the agenda. Public comment on items not listed on the agenda will be heard under the Public Comments section of the agenda. Public comments on items listed on the agenda will be heard as the Mayor calls the items. In compliance with State law, the Council may not take action on an item that is not specifically listed on the agenda. If you would like to speak on any agenda item, please fill out a public speaker card available in the lobby and submit it to the City Clerk seated in the Council Chamber **prior to the agenda item being called**. The Mayor will call you by name to the podium to hear your comment. PUBLIC COMMENTS ARE LIMITED TO THREE (3) MINUTES. Online public comments are accepted until 5 p.m. the day of the meeting and can be submitted at <https://www.ci.oakley.ca.us/online-public-comment-card/>.

1. OPENING MATTERS

1.1 Call to Order and Roll Call of the Oakley City Council/Oakley City Council Acting as the Successor Agency to the Oakley Redevelopment Agency/Oakley Public Financing Authority

1.2 Pledge of Allegiance to the Flag

2. PUBLIC COMMENTS

At this time, the public is permitted to address the Oakley City Council/Oakley City Council Acting as the Successor Agency to the Oakley Redevelopment Agency/Oakley Public Financing Authority on non-agendized items.

3. COUNCILMEMBER COMMENTS

4. CONSENT CALENDAR

Consent Calendar items are typically non-controversial in nature and are considered for approval by the Oakley City Council/ Oakley City Council Acting as the Successor Agency to the Oakley Redevelopment Agency/Oakley Public Financing Authority with one single action. Members of the audience, Staff or the Oakley City Council/ Oakley City Council Acting as the Successor Agency to the Oakley Redevelopment Agency/Oakley Public Financing Authority who would like an item removed from the Consent Calendar for purposes of public input may request the Mayor remove the item. The public may request to remove an item(s) to provide input by completing a public speaker card and submitting it to the City Clerk prior to the item(s) being called by the Mayor.

4.1 Approve Minutes from the Regular Joint City Council/City Council Acting as the Successor Agency to the Redevelopment Agency/Public Financing Authority Meeting held September 10, 2024 (Libby Vreonis, City Clerk) [Minutes 09-10-24](#)

4.2 Report Out of Closed Session Memo (Derek Cole, City Attorney) [Memo](#)

- 4.3 Adopt a Resolution Authorizing the City Manager to Execute an Agreement for Tree Pruning and Removal Services with West Coast Arborists, Inc. for the City of Oakley for Fiscal Years 2024/25 and 2025/26 (Kevin Rohani, P.E., Public Works Director/City Engineer)**

[Staff Report](#)

[1. WCA Proposal 2024-2026](#)

[2. Resolution](#)

- 4.4 Annexation No. 40 (Rosewood Estates SD 8787) to the City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services) (Kevin Rohani, P.E., Public Works Director/City Engineer)**

[Staff Report](#)

[1. Unanimous Approval Form](#)

[2. Resolution Approving Annexation](#)

[3. CFD 2015-2 Amended Boundary Map](#)

[4. Amendment to Notice of Special Tax Lien](#)

- 4.5 Adopt a Resolution Updating Job Classifications and Related Disclosure Categories as set forth in Chapter 9 of Title 2 of the Oakley Municipal Code Regarding the Conflict of Interest Code (Libby Vreonis, City Clerk)**

[Staff Report](#)

[1. Resolution](#)

[2. Appendix](#)

5. PUBLIC HEARINGS

6. REGULAR CALENDAR

7. REPORTS

7.1 CITY MANAGER

(a) City Manager

(b) Report from the Oaks Apartments

(c) E. Cypress Road Widening (Jersey Island Road to Bethel Island Road) (CIP No. 247) Update

(d) Laurel Road Widening (O'Hara Avenue to Cloverbrook Avenue) Project (CIP No. 280) Update

[\(b\) Report from the Oaks Apartments](#)

7.2 OAKLEY CITY COUNCIL/OAKLEY CITY COUNCIL ACTING AS THE SUCCESSOR AGENCY TO THE OAKLEY REDEVELOPMENT AGENCY

(a) Reports from Council Liaisons to Regional Committees, Commissions and Boards AND Oakley City Council/Oakley City Council Acting as the Successor Agency to the Oakley Redevelopment Agency

(b) Requests for Future Agendas

8. WORK SESSION
9. CLOSED SESSIONS
10. ADJOURN



Minutes of the Regular Joint Meeting of the Oakley City Council/Oakley City Council Acting as the Successor Agency to the Oakley Redevelopment Agency/Oakley Public Financing Authority held September 10, 2024

1) OPENING MATTERS

1.1 Call to Order and Roll Call of the Oakley City Council/Oakley City Council Acting as the Successor Agency to the Oakley Redevelopment Agency/Oakley Public Financing Authority

Mayor Anissa Williams called the meeting to order at 6:30 p.m. in the Oakley City Council Chambers located at 3231 Main Street, Oakley, California. Vice Mayor Shannon Shaw and Councilmembers Dr. George Fuller, Hugh Henderson and Aaron Meadows were also present.

1.2 Pledge of Allegiance to the Flag (Isabella Brown, Laurel Elementary School Student)

Mayor Williams introduced the item and the student. Laurel Elementary Student Isabella Brown led the Pledge of Allegiance to the Flag.

1.3 Update on the Delta (Roger Mammon)

Roger Mammon presented an update on the Delta.

1.4 BART Update (Mark Foley, BART Vice President-Director, District 2)

Mark Foley, BART Vice President-Director, District 2, provided a PowerPoint presentation and update. He introduced Bradley Dunn, BART Manager of Local Government and Community Relations.

Dr. Fuller and Mayor Williams asked questions and made comments which Mr. Foley responded to.

2) PUBLIC COMMENTS

Mayor Williams mentioned one online public comment was submitted and will be entered into the minutes and another comment will be followed up on. No other public comments were submitted.

3) COUNCILMEMBER COMMENTS

Dr. Fuller and Vice Mayor Shaw provided comments.

4) CONSENT CALENDAR

- 4.1 **Approve Minutes from the Regular Joint City Council/City Council Acting as the Successor Agency to the Redevelopment Agency/Public Financing Authority Meeting held August 13, 2024 (Libby Vreonis, City Clerk)**
- 4.2 **Approve Minutes from the Special City Council Meeting held August 21, 2024 (Libby Vreonis, City Clerk)**
- 4.3 **Adopt a Resolution Designating Mayor Anissa Williams as Voting Delegate and Vice Mayor Shannon Shaw as an Alternate Voting Delegate for the General Assembly to be held at the Cal Cities Annual Conference and Expo October 16-18, 2024, and directing the City Clerk to complete the Cal Cities online Voting Delegate submission form by September 25, 2024, to attest the Council action taken (Libby Vreonis, City Clerk)**
- 4.4 **Adopt a Resolution Accepting the subdivision improvements associated with Baldocchi Property Subdivision 8904 located at the southeast corner of East Cypress Road and Sellers Avenue (Kevin Rohani, P.E., Public Works Director/City Engineer)**
- 4.5 **Adopt a Resolution Accepting the subdivision improvements associated with Woodbury Subdivision 9516 located at the northeast corner of East Cypress Road and Emerson Ranch Way (Kevin Rohani, P.E., Public Works Director/City Engineer)**
- 4.6 **Adopt a Resolution Creating Zone 193 within the Oakley Special Police Tax Area consisting of the Oakley Shops at Laurel Fields project located at 998 Laurel Road (Parcels 1 and 2 of Minor Subdivision Map 24-976) (Kevin Rohani, P.E., Public Works Director/City Engineer)**
- 4.7 **Ratify Election: Adopt Ordinance No. 13-24 Authorizing the Levy of a Special Tax on Parcels of Land within Tax Area Zone 192 within the Oakley Special Police Tax Area for Police Protection Services for the Rosewood Estates project (Subdivision 8787) located at 4073 Rose Avenue (APN 035-220-035-6) (Kevin Rohani, P.E., Public Works Director/City Engineer)**

4.8 Adopt a Resolution Amending the City's Proclamation Policy to Add Eating Disorder Awareness Week to the Approved Proclamation List (Kim Snodgrass, Deputy City Clerk)

Dr. Fuller pulled items 4.1 and 4.3.

It was moved by Vice Mayor Shaw and seconded by Councilmember Meadows to approve the remainder of the Consent Calendar. Motion was unanimous and so ordered. (5-0)

Item 4.1

Dr. Fuller commented that the minutes are incomplete, and he will vote 'no'.

It was moved by Councilmember Meadows and seconded by Vice Mayor Shaw to approve the minutes as submitted. AYES: Henderson, Meadows, Shaw, Williams. NOES: Fuller. (4-1)

Item 4.3

Dr. Fuller commented that he will vote 'no'.

It was moved by Councilmember Henderson and seconded by Councilmember Meadows to adopt the resolution. AYES: Henderson, Meadows, Shaw, Williams. NOES: Fuller. (4-1)

5) PUBLIC HEARINGS

Mayor Williams announced there are no public hearings.

6) REGULAR CALENDAR

6.1 Adopt a Resolution Authorizing the Execution of a Memorandum of Understanding with Civic Summer Lake North, LLC (Derek Cole, City Attorney)

City Attorney Derek Cole presented the staff report.

Mayor Williams asked a question. Mr. McMurray responded.

There were no public comments.

It was moved by Dr. Fuller and seconded by Vice Mayor Shaw to adopt the resolution. Motion was unanimous and so ordered. (5-0)

7) REPORTS

7.1 CITY MANAGER

(a) City Manager

(b) Business License Update

City Manager Joshua McMurray announced the Heart of Oakley Festival on 9/21/24, 11am-4pm in Civic Center Plaza and Downtown, he mentioned the August new business license list was provided in the agenda packet, he shared a video made in partnership with CCTV regarding the library/community center project, and he mentioned fundraisers for the library/community center project.

7.2 OAKLEY CITY COUNCIL/OAKLEY CITY COUNCIL ACTING AS THE SUCCESSOR AGENCY TO THE OAKLEY REDEVELOPMENT AGENCY

(a) Reports from Council Liaisons to Regional Committees, Commissions and Boards AND Oakley City Council/Oakley City Council Acting as the Successor Agency to the Oakley Redevelopment Agency

Reports were provided by Vice Mayor Shaw, Councilmembers Henderson, Meadows and Fuller, and Mayor Williams.

(b) Requests for Future Agendas

Dr. Fuller requested pop filter screens for the microphones. Mr. McMurray confirmed staff can look into the screens without having to bring it back as a future agenda item.

Mayor Williams requested an item on an inclusionary housing policy. Dr. Fuller explained what is currently happening and supported having it as an item to look at.

8) WORK SESSIONS

Mayor Williams announced there are no work sessions.

9) CLOSED SESSION

Mayor Williams announced the item and indicated after closed session, the meeting will be adjourned. She announced the next regular meeting will be held September 24, 2024.

9.1 CONFERENCE WITH REAL PROPERTY NEGOTIATORS pursuant to Government Code Section 54956.8

Property: Neroly Road, Oakley, CA, APN 041-021-025

Agency Negotiator: Joshua McMurray, City Manager

Negotiating Party: Diane E. Schatz

Under Negotiation: Price and term of payment

10) ADJOURN

There being no further business, the meeting was adjourned at 7:45 p.m.

Respectfully Submitted,

Libby Vreonis
City Clerk

Date: September 10, 2024
To: Mayor and City Councilmembers
From: Derek P. Cole, City Attorney
CC: Joshua McMurray, City Manager
Subject: Closed Session Report-Out Memo

For Consideration at the City Council Meeting of September 24, 2024

Background and Analysis

The City Council considered the following closed session item during its regular meeting held September 10, 2024:

CONFERENCE WITH REAL PROPERTY NEGOTIATORS

(Pursuant to Government Code Section 54956.8)

Property: Neroly Road, Oakley, CA APN 041-021-025

Agency Negotiator: Joshua McMurray, City Manager

Negotiating Party: Diane E. Schatz

Under Negotiation: Price and term of payment

Direction was provided to staff. There was no reportable action.

Fiscal Impact

None.

Recommendation

Receive and file this report.

Attachments

None.



DATE: September 24, 2024
TO: Joshua McMurray, City Manager
FROM: Kevin Rohani, P.E., Public Works Director/City Engineer
SUBJECT: Adopt a Resolution Authorizing the City Manager to Execute an Agreement for Tree Pruning and Removal Services with West Coast Arborists, Inc. for the City of Oakley for Fiscal Years 2024/25 and 2025/26

Approved and
Forwarded to the
City Council

Background and Analysis

The City of Oakley has limited in-house resources to be able to address all of the on-going maintenance needs of the public infrastructure and facilities in the community. Outside contractors have been used to supplement City staff in performing maintenance activities. The various types of public works maintenance activities that the City needs for outside contractor resources generally are for: major street repair, storm drain pipe repair and rehabilitation, ditch cleaning, large scale brush removal from open ditches and drainage basins, tree services, striping of streets and parking lots, guard rail repair and replacement and concrete repair and street lighting repair and maintenance.

West Coast Arborists, Inc. specializes in providing municipalities tree-related services and work for many of the other agencies in the Bay Area. This firm recently performed the work for the City's annual tree pruning contract which was successfully completed.

The award of the agreement is exempt from competitive bidding under Section 3.6.010 of the Oakley Municipal Code paragraph 8) which provides an exception for competitive bidding "For maintenance and repair of buildings and facilities." Currently, for all such contract services above the \$50,000 amount, the City Council must authorize the work by simple majority per the City's purchasing policy.

Consistency with the Oakley Strategic Plan 27+

This item is consistent with the Strategic Plan 27+ Community Health and Safety goals.

Fiscal Impact

Approval of the resolution will authorize the City Manager to execute the On-Call Tree Services agreement with West Coast Arborists, Inc. for Fiscal Year 2024/25 and FY 2025/26, and if at the end of the term the services have been performed satisfactorily, the City Manager has the discretion to approve an extension of the agreement to June 30, 2028, under the same terms as the original agreement. The funding for this service



is included in the Public Works Department operations budget for the respective fiscal years.

Staff Recommendation

Staff recommends that the City Council adopt the resolution approving the Tree Services Maintenance Agreement with West Coast Arborists, Inc. for a two-year period and authorize the City Manager to execute the agreement with the ability to approve an extension to the agreement through June 30, 2028, if work is performed satisfactorily.

Attachments

Attachment 1 – West Coast Arborists, Inc. Proposal

Attachment 2 - Resolution





September 06, 2024

CITY OF OAKLEY
ATTN: JESSE DELA CRUZ
3231 MAIN STREET
OAKLEY, CA 94561

RE: Tree Maintenance Services performed by WCA, Inc.

Dear Mr. Dela Cruz,

At West Coast Arborists, Inc., we pride ourselves on delivering the caliber of quality, integrity, and customer service that you expect and deserve from your tree care provider. We deeply appreciate you and your team's commitment to caring for the City's urban forest.

As we reached the conclusion of the contract year under our agreement, we wish to express our interest in continuing our partnership. Over the course of this contract, we've encountered notable escalations in operational costs, particularly in labor, fuel, recycling, and insurance premiums. As a result, we respectfully request a cost adjustment of 5.0% and agree to hold the rates the same for a new two-year period through June 30, 2026.

Effective Date:	July 01, 2024 - June 30, 2026
Cost Adjustment Requested:	5.00%
Region Area:	San Francisco-Oakland-Hayward

We sincerely value your attention to this matter. Our aim is to continue as your trusted provider for urban forest management and maintenance services. If you have any questions or need further information, please feel free to reach out to me via email at vgonzalez@wcainc.com or at **(714) 991-1900**.

Sincerely,

Victor M. Gonzalez
Vice President, Business Development



Schedule of Compensation for Year 2024 - 2026

Tree Maintenance Services performed by WCA, Inc.

Item	Description	Unit	Proposed Prices
1	Grid Pruning	Each	\$113.40
2	Svc Rqst Pruning 0-6 DSH	Each	\$58.50
3	Svc Rqst Pruning 7-18 DSH	Each	\$118.25
4	Svc Rqst Pruning 19-24 DSH	Each	\$225.75
5	Svc Rqst Pruning 25-36 DSH	Each	\$440.85
6	Svc Rqst Pruning >36 DSH	Each	\$596.05
7	Tree & Stump Removal 0-24 DSH	Inch	\$46.60
8	Tree & Stump Removal >24 DSH	Inch	\$58.50
9	Tree Only Removal 0-24 DSH	Inch	\$28.70
10	Tree Only Removal >24 DSH	Inch	\$40.65
11	Stump Only Removal	Inch	\$17.85
12	Plant 24" Box Tree	Each	\$417.90
13	Plant 36" Box Tree	Each	\$1,433.25
14	Plant 48" Box Tree	Each	\$2,628.15
15	Plant 60" Box Tree	Each	\$7,047.60
16	Root Pruning - 24" depth	Linear Foot	\$28.70
17	Root Pruning - 36" depth	Linear Foot	\$43.05
18	Pesticide Treatment 0-12 DSH	Each	\$28.70
19	Pesticide Treatment >12 DSH	Each	\$59.70
20	Watering	Each	\$10.70
21	GPS Inventory	Each	\$6.00
22	Arborist Report	Each	\$597.30
23	Certified Arborist - 2 hour min	Man Hour	\$149.10
24	Specialty Equipment Rental	Hour	\$107.50
25	Crew Rental - per man	Man Hour	\$107.50
26	Emergency Call Out - 3 hour min	Man Hour	\$149.10

The proposed rates reflect a one-time cost adjustment of 5% for two years FY24-25 and FY25-26.

RESOLUTION NO. ____-24

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF OAKLEY APPROVING AN AWARD OF CONTRACT WITH WEST COAST ARBORISTS, INC. FOR ON-CALL TREE MAINTENANCE SERVICES AND AUTHORIZING THE CITY MANAGER TO EXECUTE AN AGREEMENT FOR FISCAL YEARS 2024/25 AND 2025/26

WHEREAS, the City of Oakley Public Works Department frequently seeks outside contractor maintenance services for City-owned infrastructure; and

WHEREAS, the continues growth of trees in the community necessitates professional tree pruning services to ensure the trees grow properly and stay vibrant and healthy; and

WHEREAS, West Coast Arborists, Inc. has performed tree maintenance services competently for the term of the previous contract; and

WHEREAS, the award of the agreement is exempt from competitive bidding under Section 3.6.010 of the Oakley Municipal Code paragraph 8) which provides an exception for competitive bidding "*For maintenance and repair of buildings and facilities*".

NOW, THEREFORE, BE IT RESOLVED AND ORDERED, by the City Council of the City of Oakley that the On-Call Tree Maintenance Services agreement with West Coast Arborists, Inc. for each Fiscal Year 2024/25 and FY 2025/26 is hereby approved, and the City Manager is authorized to execute said agreement. The proposal is attached hereto as Exhibit A.

BE IT FURTHER RESOLVED AND ORDERED, if at the end of the term, the services have been performed satisfactorily the City Manager has the discretion to approve an extension of the agreement to June 30, 2028, under the same terms as the original agreement.

PASSED AND ADOPTED by the City Council of the City of Oakley at a meeting held on the 24th of September 2024 by the following vote:

AYES:

NOES:

ABSENT:

ABSTENTIONS:

APPROVED:

Anissa Williams, Mayor

ATTEST:

Libby Vreonis, City Clerk

Date

DATE: September 24, 2024
TO: Joshua McMurray, City Manager
FROM: Kevin Rohani, P.E., Public Works Director/City Engineer
SUBJECT: Annexation No. 40 (Rosewood Estates SD 8787) to the City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services)

Background and Analysis

On March 23, 2010, the City Council approved a vesting tentative map with certain Conditions of Approval for the proposed Rosewood Estates project (Subdivision 8787) (the "Project"). The Project located at the Northeast corner of Laurel Road and Rose Avenue, is currently comprised of Assessor Parcel No. 035-220-035-6, which is expected to be subdivided into 58 single-family residential parcels at build-out.

The Conditions of Approval for the Project require the property owner to mitigate their project's financial impact on the City's parks, streetlighting, landscape and stormwater service budgets. On January 12, 2016, the Oakley City Council formed City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services) ("CFD No. 2015-2"). CFD No. 2015-2 authorizes the annual levy of a special tax on parcels located within CFD No. 2015-2 to mitigate their financial impact to the City's parks, streetlighting, landscape and stormwater service budgets. The property owner for the Project has requested the City assist them with the annexation of their development into CFD No. 2015-2 to satisfy their conditions of approval.

Prior to tonight's City Council meeting, the property owner for the Project executed the attached Unanimous Approval Form. This form constitutes unanimous approval and a unanimous vote by the property owner in favor of annexing their property to CFD No. 2015-2 including the subsequent annual levy of special taxes to mitigate their project's financial impact on the City's parks, streetlighting, landscape and stormwater service budgets.

Consistency with the Oakley Strategic Plan 27+

This item is consistent with the Strategic Plan 27+ Park and Open Space and Finance and Fiscal Responsibility section goals.

Fiscal Impact

There will be no financial impact to the City's General Fund. The applicant has funded all costs associated with the annexation of their project to CFD No. 2015-2. The FY 2024-25 special tax rates per single-family parcel are as follows:



FY 2024-25 Maximum Special Tax Rates per Single-Family Parcel	
Special Tax Component	Maximum Annual Special Tax Rates
Regional Park Maintenance Tax	\$170.12
Community Parks Maintenance Tax	\$375.68
Streetlighting Maintenance Tax	\$74.17
Neighborhood Parks & Landscape Maintenance Tax	\$485.92
Stormwater/Water Quality Maintenance Tax	<u>\$298.06</u>
Total	\$1,403.95

The Project is anticipated to consist of 58 single-family parcels. Therefore, successful annexation of the Project into CFD 2015-2 could provide up to \$81,429 (in FY 2024-25 dollars) in revenue annually when all commercial buildings are constructed. The taxes will be collected on the property tax rolls commencing in FY 2025-26.

Staff Recommendation

The conditions of approval for the Project require the property owner to mitigate their project's financial impact on the City's parks, streetlighting, landscape and stormwater service budgets. Staff recommends that the City Council:

1. Adopt a Resolution Approving the Annexation (Annexation No. 40) of Property Located in the Future Annexation Area of the City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services)

Attachments

1. Unanimous Approval of Annexation to a Community Facilities District and Related Matters - City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services)
 1. Exhibit A – Description of Services
 2. Exhibit B – Cost Estimate
 3. Exhibit C – Supplement to the Rate and Method of Apportionment of Special Tax – Tax Zone No. 36
2. Resolution Approving the Annexation (Annexation No. 40) of Property Located in the Future Annexation Area of the City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services)
3. Map – Annexation No. 40 to City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services)
4. Amendment No. 40 to Notice of Special Tax Lien – City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services)



**UNANIMOUS APPROVAL
of Annexation to a Community Facilities District
and Related Matters**

**CITY OF OAKLEY
Community Facilities District No. 2015-2
(Parks, Streetlight, Landscape and Stormwater Services)**

Annexation No. 40 – Tax Zone No. 36

September 24, 2024

To the Honorable City Council,
City of Oakley
3231 Main Street
Oakley, CA 94561

Members of the City Council:

This constitutes the Unanimous Approval (the “Unanimous Approval”) of the record owner(s) (the “Property Owner”) of the fee title to the real property identified below (the “Property”) contemplated by Section 53339.3 et seq. of the Mello-Roos Community Facilities Act of 1982, as amended (the “Act”) to annexation of the Property to the "City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services)" (the “CFD”), and it states as follows:

1. Property Owner. This Unanimous Approval is submitted by the Property Owner as the record owner(s) of fee title to the Property. The Property Owner has supplied to the City current evidence of its ownership of fee title to the Property.

2. Approval of Annexation. This Unanimous Approval constitutes the unanimous approval and unanimous vote by the Property Owner in favor of the annexation of the Property to the CFD. The CFD was formed to finance the municipal services (the “Services”) described in Exhibit A hereto and made a part hereof.

3. Approval of Special Tax and the Services. This Unanimous Approval constitutes the unanimous approval and unanimous vote by the Property Owner in favor of the levy of special taxes (the “Special Taxes”) on the Property to finance the Services. The Special Taxes will be levied according to the “Supplement to the Rate and Method of Apportionment of Special Tax – Tax Zone No. 36” attached hereto as Exhibit C and made a part hereof (the “Rate and Method”). The cost estimate for the Services is attached hereto as Exhibit B.

4. Waivers and Vote. The Property Owner hereby confirms that this Unanimous Approval constitutes its approval and unanimous vote as described herein and as contemplated by Section 53339.3 et seq. of the Act and Article XIII A of the California Constitution. The Property Owner hereby waives all other rights with respect to the annexation of the Property, the levy of the Special Taxes on the Property and the other matters covered in this Unanimous Approval.

5. Recordation of Amendment to Notice of Special Tax Lien. The Notice of Special Tax Lien for the CFD was recorded in the Office of the County Recorder of the County of Contra Costa, State of California on January 19, 2016, as Document No. 20160009045. The Property Owner hereby authorizes and directs the City Clerk to execute and cause to be recorded in the office of the County Recorder of the County of Contra Costa an amendment to the Notice of Special Tax Lien for the CFD as required by Section 3117.5 of the California Streets and Highways Code. The amendment to the Notice of Special Tax Lien shall include the Rate and Method as an exhibit thereto.

6. Authority Warranted. The Property Owner warrants to the City that the presentation of this Unanimous Approval, any votes, consents or waivers contained herein, and other actions mandated by the City for the annexation of the Property to the CFD shall not constitute or be construed as events of default or delinquencies under any existing or proposed financing documents entered into or to be entered into by the Property Owner for the Property, including any “due-on-encumbrance” clauses under any existing security instruments secured by the Property.

7. Due Diligence and Disclosures. The Property Owner agrees to cooperate with the City and its attorneys and consultants and to provide all information and disclosures required by the City about the Special Taxes to purchasers of the Property or any part of it.

8. Agreements. The Property Owner further agrees to execute such additional or supplemental agreements as may be required by the City to provide for any of the actions and conditions described in this Unanimous Approval, including any cash deposit required to pay for the City’s costs in annexing the Property to the CFD.

9. The Property. The Property is identified as follows:

Assessor’s Parcel No: 035-220-035-6

Acres: 12.64

By executing this Unanimous Approval, the Property Owner agrees to all of the above.

Annexation No. 40 - Tax Zone No. 36

Property Owner

By: ADS III HOLDINGS LLC

Name: _____

Title: _____

Notice Address: _____

EXHIBIT A

CITY OF OAKLEY Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services)

DESCRIPTION OF SERVICES

The captioned Community Facilities District will finance, in whole or in part, the following services ("services" shall have the meaning given that term in the Mello-Roos Community Facilities Act of 1982), including all related administrative costs, expenses and related reserves for replacement of vehicles, equipment and facilities:

Regional Parks

Maintenance, including servicing, repair, replacement and removal of regional parks (includes park amenities such as buildings, sports fields, sports courts, playground equipment, play courts, play structures, picnic tables, lighting, drinking fountains, barbeques, etc.), both (i) in the CFD and (ii) outside the CFD but within the boundaries of the City if the City has concluded that such maintenance would benefit the CFD. Maintenance also includes cleaning and removal of graffiti, and associated electric, water and other utility costs.

Community Parks

Maintenance, including servicing, repair, replacement and removal of community parks (includes park amenities such as buildings, sports fields, sports courts, playground equipment, play courts, play structures, picnic tables, lighting, drinking fountains, barbeques, etc.), both (i) in the CFD and (ii) outside the CFD but within the boundaries of the City if the City has concluded that such maintenance would benefit the CFD. Maintenance also includes cleaning and removal of graffiti, and associated electric, water and other utility costs.

Streetlighting

Maintenance, including servicing, repair, replacement and removal of streetlights (includes poles, fixtures, bulbs, conduits, equipment, including guys, anchors, posts, pedestals and metering devices, etc.), both (i) in the CFD and (ii) outside the CFD but within the boundaries of the City if the City has concluded that such maintenance would benefit the CFD. Maintenance also includes cleaning and removal of graffiti, and associated electric and other utility costs.

Neighborhood Parks & Landscaping

Maintenance, including servicing, repair, replacement and removal of neighborhood parks (includes park amenities such as playground equipment, play courts, play structures, picnic tables, lighting, drinking fountains, barbeques, etc.), both (i) in the CFD and (ii) outside the CFD but within the boundaries of the City if the City has concluded that such maintenance would benefit the CFD. Maintenance also includes cleaning and removal of graffiti, and associated electric, water and other utility costs.

Maintenance, including servicing, repair, replacement and removal of parkways, landscape setbacks, landscaped roadway medians, open space, environmental preserves (including performance and management of environmental mitigation monitoring and annual reporting), publicly-owned masonry walls, fences, monuments and features, trails, bike paths, etc., both (i) in the CFD and (ii) outside the CFD but within the boundaries of the City if the City has concluded that such maintenance would benefit the CFD. Maintenance also includes cleaning and removal of graffiti, and associated electric, water and other utility costs.

Stormwater

Maintenance, including servicing, repair, replacement and removal of bio-retention facilities and drainage facilities (includes field inspections, record keeping, cost of permits and regulatory fees, environmental mitigation monitoring, annual reporting, vegetation management, removal of silt, sediment, trash and debris from the drainage areas, bio-retention basins and City catch basins, etc.), both (i) in the CFD and (ii) outside the CFD but within the boundaries of the City if the City has concluded that such maintenance would benefit the CFD. Maintenance also includes cleaning and removal of graffiti, and associated electric, water and other utility costs.

In addition, the following costs will also be financed by the special taxes levied within the CFD and be allocated to each improvement described above based upon their pro-rata share of needed administrative costs, operating reserves and capital reserves, and actual or estimated delinquencies.

1. Administrative Expenses including the costs incurred to determine, levy and collect the special taxes, including compensation of City employees for administrative work performed in relation to the CFD, the fees of consultants and legal counsel, the costs of collecting installments of the special taxes upon the general tax rolls, preparation of required reports, and any other costs incurred in the administration of the CFD by the City;
2. Any amounts needed for operating reserves and capital reserves; and
3. Any amounts needed to cure actual or estimated delinquencies in special taxes for the current or previous fiscal years.

EXHIBIT B

**CITY OF OAKLEY
Community Facilities District No. 2015-2
(Parks, Streetlight, Landscape and Stormwater Services)**

**Cost Estimate
(FY 2024-25 Dollars)**

Table 3 - Annual Requirement	
Special Tax Component	FY 2024-25 Special Tax Requirement
Regional Park Maintenance Tax	\$9,867
Community Parks Maintenance Tax	\$21,789
Streetlighting Maintenance Tax	\$4,302
Neighborhood Parks & Landscape Maintenance Tax	\$28,183
Stormwater/Water Quality Maintenance Tax	<u>\$17,287</u>
Total	<u>\$81,428</u>

EXHIBIT C

CITY OF OAKLEY Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services)

SUPPLEMENT TO THE RATE AND METHOD OF APPORTIONMENT OF SPECIAL TAX – TAX ZONE NO. 36

Special Taxes in the City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services) (the “CFD” or “CFD No. 2015-2”) shall be levied and collected according to the tax liability determined by the Administrator through the application of the appropriate amount or rate for Taxable Property, as described below. All the property in CFD No. 2015-2, unless exempted by law or by the provisions of Section E herein, shall be taxed for the purposes, to the extent, and in the manner herein provided, including property subsequently annexed to CFD No. 2015-2, unless a separate Rate and Method of Apportionment of Special Tax is adopted for such annexation area.

Property annexed to City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services) pursuant to Annexation No. 41 will be annexed to Tax Zone No. 36 per the Supplement to the Rate and Method of Apportionment of Special Tax shown below.

A. DEFINITIONS

The terms hereinafter set forth have the following meanings:

“**Accessory Unit**” means a second residential unit of reduced size (e.g., granny cottage, etc.) that shares a Parcel with a Residential Unit.

“**Acre**” or “**Acreage**” means the land area of an Assessor’s Parcel as shown on an Assessor’s Parcel Map, or if the land area is not shown on an Assessor’s Parcel Map, the land area shown on the applicable Final Map or other recorded County parcel map.

“**Act**” means the Mello-Roos Community Facilities Act of 1982, as amended, being Chapter 2.5 (commencing with Section 53311), Division 2, of Title 5 of the Government Code of the State of California.

“**Administrative Expenses**” means the following actual or reasonably estimated costs directly related to the administration of CFD No. 2015-2: the costs of computing the Special Tax and preparing the annual Special Tax collection schedules (whether by the City or any designee thereof or both); the costs of collecting the Special Taxes; the costs to the City, CFD No. 2015-2, or any designee thereof of complying with

disclosure requirements associated with the Act; the costs associated with preparing Special Tax disclosure statements and responding to public inquiries, protests, or appeals regarding the Special Taxes; and the City's annual administration fees and third party expenses. Administrative Expenses shall also include amounts estimated or advanced by the City or CFD No. 2015-2 for any other administrative purposes of CFD No. 2015-2, including attorney's fees, costs associated with annexations to CFD No. 2015-2, and other costs related to commencing and pursuing to completion any foreclosure of delinquent Special Taxes.

"Administrator" means an official of the City, or any designee thereof, responsible for determining the Special Tax Requirement and providing for the levy and collection of the Special Tax.

"Assessor's Parcel" or "Parcel" means a lot or parcel shown on an Assessor's Parcel Map with an assigned Assessor's Parcel Number.

"Assessor's Parcel Map" means an official map of the County Assessor designating parcels by Assessor's Parcel Number.

"Assessor's Parcel Number" or "APN" means a unique number assigned to an Assessor's Parcel by the County Assessor for purposes of identifying a property.

"Authorized Services" means the public services authorized to be funded by CFD No. 2015-2 as set forth in the documents adopted by the Council when CFD No. 2015-2 was formed.

"Building Permit" means a building permit issued by the City and having a building structure improvement valuation over \$50,000. Building Permits for the construction of ancillary structures such as fences, swimming pools, retaining walls, etc. are excluded.

"CFD" or "CFD No. 2015-2" means the City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services).

"City" means the City of Oakley.

"City Landscape Maintenance Standards" means the then applicable landscape maintenance standards or then applicable level of service for then applicable landscape maintenance contracts executed by the City that are in effect and relate to similar landscaping improvements.

"City Manager" means the City Manager of the City of Oakley.

"Commercial Unit" means an individual building structure for commercial uses as defined per the County Assessor (e.g., grocery stores, shopping centers, motel, hotel, service stations, and offices).

“Condominium Parcel” means a Parcel designated by the County Assessor as having a condominium, townhome, cluster home and co-op land use.

“Council” means the City Council of the City of Oakley, acting as the legislative body for CFD No. 2015-2.

“County” means the County of Contra Costa.

“County Assessor” means the Contra Costa County Assessor.

“County Land Use Code” means the land use code assigned to an Assessor’s Parcel as indicated in the records of the County Assessor.

“Developed Property” means, in any Fiscal Year, all Parcels of Taxable Property for which a Building Permit was issued by the City for construction of a residential structure or a non-residential structure on or prior to June 30 of the preceding Fiscal Year. In the absence of a Building Permit, any Parcel of Taxable Property shall be classified as “Developed Property” if it has been occupied by a user as determined by the Administrator on or prior to June 30 of the preceding Fiscal Year.

“Final Map” or “Parcel Map” means a final map approved by the City pursuant to the Subdivision Map Act (California Government Code Section 66410, *et seq.*) that creates individual lots on which a Building Permit can be issued for construction of Residential Units without further subdivision of the lots.

“Fiscal Year” means the period starting on July 1 and ending on the following June 30.

“Industrial” means an individual building structure for industrial uses as defined per the County Assessor (e.g., research and development, mini-warehouse, etc.).

“Institutional” means an individual building structure for institutional uses as defined per the County Assessor (e.g., churches, hospitals, assisted living, schools, etc.).

“Land Use Classification” means the current or intended use of a Taxable Parcel as determined by the Taxable Parcel’s County Land Use Code.

“Maximum Special Tax” means, for each Special Tax Component, the maximum Special Tax, determined in accordance with Section C herein, which can be levied in any Fiscal Year.

“Mixed Use Parcel” means a Parcel designated by the County Assessor as having a multiple land uses such as residential land uses and commercial land uses, or multi-family land uses and commercial land uses.

“Multi-Family Parcel” means a Parcel designated by the County Assessor as having a multi-family residential land uses which includes duplexes, triplexes, fourplexes and apartments.

“Non-Residential Parcel” means for each Fiscal Year, all Assessor Parcels designated by the County Assessor with a County Land Use Code of Commercial, Industrial, or Institutional. If it is determined by the Administrator that the County Assessor has assigned an incorrect County Land Use Code or the assigned County Land Use Code does not correctly describe the intended or current use of the Taxable Parcel, the Administrator may assign a Land Use Classification to the Taxable Parcel described in Section C below.

“Non-Residential Parcel – In Compliance” this definition only applies for the purpose of calculating the annual neighborhood parks and landscaping maintenance tax component and means for each Fiscal Year, an Assessor Parcel designated by the County Assessor with a County Land Use Code of Commercial, Industrial, or Institutional for which the Property Owner of the Commercial, Industrial, or Institutional Parcel has notified the City in writing by the preceding February 1st that it will maintain its parcel’s frontage landscaping during the immediate following fiscal year and the City Manager or his/her designee has determined that the Property Owner has maintained its Parcel’s frontage landscaping in previous Fiscal Years to City Landscape Maintenance Standards. In addition, in order for any Commercial, Industrial, or Institutional Parcel within a Tax Zone of CFD No. 2015-2 to be defined as a Non-Residential Parcel – In Compliance, all Non-Residential Parcels within the Tax Zone must also be defined as Non-Residential Parcel – In Compliance.

“Non-Residential Parcel – Out of Compliance” this definition only applies for the purpose of calculating the annual neighborhood parks and landscaping maintenance tax component and means for each Fiscal Year, an Assessor Parcel designated by the County Assessor with a County Land Use Code of Commercial, Industrial, or Institutional for which the Property Owner of the Non-Residential Parcel has not notified the City in writing by the preceding February 1st that it will maintain its parcel’s frontage landscaping during the immediate following fiscal year or the City Manager or his/her designee has determined that the Property Owner has not maintained its Parcel’s frontage landscaping in previous Fiscal Years to City Landscape Maintenance Standards. In addition, if any Non-Residential Parcel within a Tax Zone of CFD No. 2015-2 is defined as a Non-Residential Parcel – Out of Compliance, then all Non-Residential Parcels within the Tax Zone must also be defined as Non-Residential Parcel – Out of Compliance.

“Property Owner” means the Property Owner of record per current County Assessor records unless more current information is available such as recorded deed of sale, etc.

“Proportionately” means, for Developed Property, that the ratio of the actual annual Special Tax levied in any Fiscal Year to the Maximum Special Tax authorized

to be levied in that Fiscal Year is equal for all Assessor's Parcels of Developed Property. For Undeveloped Property, "Proportionately" means that the ratio of the actual annual Special Tax levied in any Fiscal Year to the Maximum Special Tax authorized to be levied in that Fiscal Year is equal for all Assessor's Parcels of Undeveloped Property.

"Public Property" means, for each Fiscal Year: (i) any property within the boundaries of CFD No. 2015-2 that is owned by or irrevocably offered for dedication to the federal government, the State of California, the City or any other public agency; provided, however, that any property leased by a public agency to a private entity and subject to taxation under Section 53340.1 of the Act (as such section may be amended or replaced) shall be taxed and classified in accordance with its use; or (ii) any property within the boundaries of CFD No. 2015-2 that is encumbered by an unmanned utility easement making impractical its utilization for other than the purpose set forth in the easement.

"Residential Unit" means an individual building structure for residential or multi-family residential uses as defined per the County Assessor. An Accessory Unit that shares a Parcel with a Residential Unit shall not be considered a separate Residential Unit for purposes of this RMA.

"RMA" means this Rate and Method of Apportionment of Special Tax.

"Single-Family Parcel" means a Parcel designated by the County Assessor as having a single-family residential land use. If it is determined by the Administrator that the County Assessor has assigned an incorrect County Land Use Code or the assigned County Land Use Code does not correctly describe the intended or current use of the Taxable Parcel, the Administrator may assign a Land Use Classification to the Taxable Parcel described in Section C below.

"Special Tax" means any tax levied within CFD No. 2015-2 to pay the Special Tax Requirement, and includes each Special Tax Component.

"Special Tax Component" means one of the following components of the Special Tax: Community Park Maintenance Tax, Streetlighting Maintenance Tax, Neighborhood Parks and Landscape Maintenance Tax, or Stormwater Maintenance Tax.

"Special Tax Requirement" means, for each Special Tax Component, the amount of revenue needed in any Fiscal Year to pay for the following: (i) Authorized Services related to the Special Tax Component; (ii) Administrative Expenses attributable to the Special Tax Component; and (iii) amounts needed to cover any delinquencies in the payment of the Special Tax Component which occurred in the previous Fiscal Year or, based on delinquency rates in prior years, may be expected to occur in the Fiscal Year in which the Special Tax will be collected.

“Taxable Property” or “Taxable Parcels” means all Assessors’ Parcels within the boundaries of CFD No. 2015-2 that are not exempt from the Special Tax pursuant to law or Section E herein.

“Tax Zone” means a mutually exclusive geographic area within which the Special Tax may be levied pursuant to this RMA. All the property within CFD No. 2015-2 at the time of CFD Formation is within Tax Zone 1. Additional Tax Zones may be created when property is annexed to CFD No. 2015-2, and a separate Maximum Special Tax shall be identified for property within the new Tax Zone at the time of such annexation. The Assessor’s Parcels included within a new Tax Zone established when such Parcels are annexed to CFD No. 2015-2 shall be identified by Assessor’s Parcel Number in the Unanimous Approval Form that is signed by the owner(s) of the Parcels at the time of annexation.

“Unanimous Approval Form” means that form executed by the record owner of fee title to a Parcel or Parcels annexed into CFD No. 2015-2 that constitutes the property owner’s approval and unanimous vote in favor of annexing into CFD No. 2015-2, the levy of the Special Tax against his/her Parcel or Parcels pursuant to this RMA.

“Undeveloped Property” means, in any Fiscal Year, all Parcels of Taxable Property in CFD No. 2015-2 that are not classified as Developed Property.

B. DATA FOR ANNUAL TAX LEVY

Each Fiscal Year, the Administrator shall identify the current Assessor’s Parcel Numbers for all Parcels of Taxable Property within CFD No. 2015-2. The Administrator shall also determine: (i) whether each Assessor’s Parcel of Taxable Property is Developed Property or Undeveloped Property, and (ii) the Special Tax Requirement for each Special Tax Component for the then-current Fiscal Year. Each Special Tax Component shall be levied only to pay for the related Special Tax Requirement.

In any Fiscal Year, if it is determined that (i) a Final Map or Parcel Map for a portion of property in CFD No. 2015-2 was recorded after the last date upon which the County Assessor will incorporate the newly-created Parcels into the then current tax roll, (ii) because of the date the Final Map or Parcel Map was recorded, the County Assessor does not yet recognize the new Parcels that will be created by the Final Map or Parcel Map, and (iii) one or more of the newly-created Parcels would meet the definition of Developed Property, the Administrator shall calculate the Special Tax for the property affected by recordation of the Final Map or Parcel Map by determining the Special Tax that applies separately to each new Parcel that will be created by that Final Map or Parcel Map, then applying the sum of the individual Special Taxes to the Parcel that was subdivided by recordation of the Final Map or Parcel Map.

C. MAXIMUM SPECIAL TAXES

1. Developed Property - The Fiscal Year 2024-25 Maximum Special Tax for each Special Tax Component for all Parcels of Developed Property shall be as shown in Table 1 below:

Table 1: Developed Property		
Special Tax Component	Land Use Classification	FY 2024-25 Maximum Tax
Regional Park Maintenance Tax	Single-Family Parcel	\$170.12 per Parcel
Regional Park Maintenance Tax	Condominium Parcel	\$127.59 per Parcel
Regional Park Maintenance Tax	Multi-Family Parcel	\$85.06 per Unit
Regional Park Maintenance Tax	Non-Residential Parcel	\$510.36 per Acre
Community Parks Maintenance Tax	Single-Family Parcel	\$375.68 per Parcel
Community Parks Maintenance Tax	Condominium Parcel	\$281.76 per Parcel
Community Parks Maintenance Tax	Multi-Family Parcel	\$187.85 per Unit
Community Parks Maintenance Tax	Non-Residential Parcel	\$1,127.04 per Acre
Streetlighting Maintenance Tax	Single-Family Parcel	\$74.17 per Parcel
Streetlighting Maintenance Tax	Condominium Parcel	\$55.63 per Parcel
Streetlighting Maintenance Tax	Multi-Family Parcel	\$37.09 per Unit
Streetlighting Maintenance Tax	Non-Residential Parcel	\$222.52 per Acre
Neighborhood Parks & Landscaping Maintenance Tax	Single-Family Parcel	\$485.92 per Parcel
Neighborhood Parks & Landscaping Maintenance Tax	Condominium Parcel	\$364.44 per Parcel
Neighborhood Parks & Landscaping Maintenance Tax	Multi-Family Parcel	\$242.96 per Unit
Neighborhood Parks & Landscaping Maintenance Tax	Non-Residential Parcel - In Compliance	\$0.00 per Acre
Neighborhood Parks & Landscaping Maintenance Tax	Non-Residential Parcel - Out of Compliance	\$3,353.95 per Acre
Stormwater/Water Quality Maintenance Tax	Single-Family Parcel	\$298.06 per Parcel
Stormwater/Water Quality Maintenance Tax	Condominium Parcel	\$223.55 per Parcel
Stormwater/Water Quality Maintenance Tax	Multi-Family Parcel	\$149.03 per Unit
Stormwater/Water Quality Maintenance Tax	Non-Residential Parcel	\$2,057.27 per Acre

Mixed Use Parcels will have their Maximum Tax calculated each Fiscal Year based upon their combined uses on the Parcel. For example, if a one-acre parcel has commercial on the ground floor and 50 condominiums on the second floor the property owner will be charged the Non-Residential Parcel rate for one acre and the Condominium Parcel Rate for the 50 condominiums.

2. Undeveloped Property - The Fiscal Year 2024-25 Maximum Special Tax for each Special Tax Component for all Parcels of Undeveloped Property shall be as shown in Table 2 below:

Table 2: Undeveloped Property		
Special Tax Component	Land Use Classification	FY 2024-25 Maximum Tax
Regional Park Maintenance Tax	Single-Family Parcel	\$510.36 per Acre
Regional Park Maintenance Tax	Condominium Parcel	\$382.77 per Acre
Regional Park Maintenance Tax	Multi-Family Parcel	\$255.18 per Acre
Regional Park Maintenance Tax	Non-Residential Parcel	\$255.18 per Acre
Community Parks Maintenance Tax	Single-Family Parcel	\$1,127.04 per Acre
Community Parks Maintenance Tax	Condominium Parcel	\$845.28 per Acre
Community Parks Maintenance Tax	Multi-Family Parcel	\$563.52 per Acre
Community Parks Maintenance Tax	Non-Residential Parcel	\$563.52 per Acre
Streetlighting Maintenance Tax	Single-Family Parcel	\$222.52 per Acre
Streetlighting Maintenance Tax	Condominium Parcel	\$166.88 per Acre
Streetlighting Maintenance Tax	Multi-Family Parcel	\$111.27 per Acre
Streetlighting Maintenance Tax	Non-Residential Parcel	\$111.27 per Acre
Neighborhood Parks & Landscaping Maintenance Tax	Single-Family Parcel	\$3,353.95 per Acre
Neighborhood Parks & Landscaping Maintenance Tax	Condominium Parcel	\$3,353.95 per Acre
Neighborhood Parks & Landscaping Maintenance Tax	Multi-Family Parcel	\$3,353.95 per Acre
Neighborhood Parks & Landscaping Maintenance Tax	Non-Residential Parcel - In Compliance	\$0.00 per Acre
Neighborhood Parks & Landscaping Maintenance Tax	Non-Residential Parcel - Out of Compliance	\$3,353.95 per Acre
Stormwater/Water Quality Maintenance Tax	Single-Family Parcel	\$2,057.27 per Acre
Stormwater/Water Quality Maintenance Tax	Condominium Parcel	\$2,057.27 per Acre
Stormwater/Water Quality Maintenance Tax	Multi-Family Parcel	\$2,057.27 per Acre
Stormwater/Water Quality Maintenance Tax	Non-Residential Parcel	\$2,057.27 per Acre

3. Escalation of Maximum Special Tax

On July 1, 2025, and each July 1 thereafter, the Maximum Special Tax for each Special Tax Component for the current Fiscal Year for Developed Property and Undeveloped Property shall be increased from the Maximum Special Tax for the respective Special Tax Component for the previous Fiscal Year by Consumer Price Index – All Urban Consumers (San Francisco-Oakland-San Jose, CA) (from February) with a minimum annual increase of three (3.00%) percent and a maximum annual increase of five (5.00%) percent for any given year.

D. METHOD OF LEVY AND COLLECTION OF SPECIAL TAXES

Each Fiscal Year, the Administrator shall determine the Special Tax Requirement for each Special Tax Component for that Fiscal Year and levy each Special Tax Component on all Parcels of Taxable Property as follows:

Step 1: Each Special Tax Component shall be levied Proportionately on each Parcel of Developed Property up to 100% of the Maximum Special Tax for each Parcel of Developed Property for such Fiscal Year until the amount levied is equal to the Special Tax Requirement for such Special Tax Component;

Step 2: If additional revenue is needed after Step 1, each Special Tax Component shall be levied Proportionately on each Parcel of Undeveloped Property up to 100% of the Maximum Special Tax for each Parcel of Undeveloped Property for such Fiscal Year until the amount levied, when combined with the amount of the Special Tax Component levied pursuant to Step 1, is equal to the Special Tax Requirement for such Special Tax Component.

The Special Tax for CFD No. 2015-2 shall be collected at the same time and in the same manner as ordinary ad valorem property taxes provided, however, that the City may (under the authority of Government Code Section 53340) collect Special Taxes at a different time or in a different manner if necessary to meet the financial obligations of CFD No. 2015-2, and the Special Tax shall be subject to foreclosure if delinquent regardless of the manner in which it was collected.

E. EXEMPTIONS

No Special Tax shall be levied on Parcels of Public Property or any privately-owned Parcels that are non-developable, such as common areas, wetlands, and open space, parks, etc. except as otherwise provided in this RMA and in the Act.

F. INTERPRETATION OF SPECIAL TAX FORMULA

The City reserves the right to make minor administrative and technical changes to this document that does not materially affect the rate and method of apportioning Special Taxes. In addition, the interpretation and application of any section of this document shall be left to the City's discretion. Interpretations may be made by the City through a resolution of the Council for purposes of clarifying any vagueness or ambiguity in this RMA.

G. TERM OF THE SPECIAL TAX

The Special Tax shall be levied in perpetuity as necessary to pay the Special Tax Requirement.

H. REPEAL OF THE SPECIAL TAX

CFD No. 2015-2 was established to levy the Special Tax to finance the Authorized Services as a condition of the entitlement to develop the Developed Property in CFD No. 2015-2. If the levy of the Special Tax is repealed by initiative or any other action participated in by the owners of Parcels in CFD No. 2015-2, the City shall cease to levy the Special Tax and shall cease to be obligated to provide the Authorized Services for which the Special Tax was levied.

I. SEVERABILITY

The invalidity or unenforceability of any provisions of this Rate and Method of Apportionment of Special Tax shall not affect the validity or enforceability of any other provision of this Rate and Method of Apportionment of Special Tax, which shall remain in full force and effect.

RESOLUTION NO. _____

**RESOLUTION APPROVING THE ANNEXATION (ANNEXATION NO. 40) OF
PROPERTY LOCATED IN THE FUTURE ANNEXATION AREA OF**

**CITY OF OAKLEY
Community Facilities District No. 2015-2
(Parks, Streetlight, Landscape and Stormwater Services)**

RESOLVED by the City Council (the "Council") of the City of Oakley (the "City"), County of Contra Costa, State of California, that:

WHEREAS, this Council has adopted a resolution entitled "Resolution of Formation of Community Facilities District" (the "Resolution of Formation"), ordering the formation of the (i) the "City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services)" (the "CFD") and (ii) the "City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services) (Future Annexation Area)," authorizing the levy of a special tax on property within the CFD, and preliminarily establishing an appropriations limit for the CFD, all pursuant to Chapter 2.5 of Part 1 of Division 2 of Title 5, commencing with Section 53311, of the California Government Code (the "Act").

WHEREAS, under the Resolution of Formation and a resolution calling special election heretofore adopted by this Council, the propositions of the levy of the special tax and the establishment of the appropriations limit were submitted to the qualified electors of the CFD as required by the Act.

WHEREAS, on January 12, 2016, a special election was held among the landowner voters within the CFD, wherein such propositions were approved by the two-thirds vote required by the Act, as confirmed by resolution of this Council.

WHEREAS, on January 19, 2016, a notice of special tax lien (the "Notice of Special Tax Lien") was recorded with the Contra Costa County Recorder's office, thereby giving notice that the lien to secure payment of the Special Tax was imposed on the land in the CFD.

WHEREAS, the owner (the "Property Owner") of Assessor's Parcel Number 035-220-035-6 located within the Future Annexation Area (the "Property") has agreed to mitigate certain impacts of the proposed development of the Property by paying for certain services financed by the CFD.

WHEREAS, pursuant to the Act, the Property Owner has executed a Unanimous Approval constituting a unanimous approval and unanimous vote by the Property Owner in favor of the annexation of the Property to the CFD and the levy of the Special Tax.

NOW, THEREFORE, BE IT RESOLVED AND ORDERED, as follows:

- 1. Recitals.** The foregoing recitals are all true and correct.
- 2. Approval of Annexation.** The City Council hereby determines that Assessor's Parcel Number 035-220-035-6 is annexed into Tax Zone No. 36 of the CFD.
- 3. Amendment to Notice of Special Tax Lien.** The City Council hereby directs the Clerk of the City Council to record an Amendment to Notice of Special Tax Lien, evidencing that Assessor's Parcel Number 035-220-035-6 is added to the CFD.
- 4. Boundaries Described.** The revised boundaries of the CFD including Assessor's Parcel Number 035-220-035-6 are described in an amended boundary map, which this City Council hereby directs the City Clerk to record with the Contra Costa County Recorder's office.
- 5. General Authority; Ratification of Previous Actions.** The officers of the City are hereby authorized and directed, jointly and severally, to do any and all things and to execute and deliver any and all documents which they may deem necessary or advisable in order to consummate the transactions described herein or to otherwise effectuate the purposes of this resolution. Any actions previously taken by such officers that are consistent with the purposes of this resolution are hereby ratified and confirmed.
- 6. Effective Date.** This Resolution shall take effect upon its adoption.

PASSED AND ADOPTED by the City Council of the City of Oakley at a meeting held on September 24, 2024, by the following vote:

AYES:
NOES:
ABSENT:
ABSTENTIONS:

APPROVED:

Anissa Williams, Mayor

ATTEST:

Libby Vreonis, City Clerk

Date

ANNEXATION MAP No. 40 TO
CITY OF OAKLEY COMMUNITY FACILITIES DISTRICT No. 2015-2
(PARKS, STREETLIGHTS, LANDSCAPE MAINTENANCE AND STORMWATER)

CITY OF OAKLEY
CONTRA COSTA COUNTY, STATE OF CALIFORNIA

FILED IN THE OFFICE OF THE CITY CLERK OF THE CITY OF OAKLEY THIS
____ DAY OF _____, 2024.

LIBBY VREONIS, CITY CLERK
CITY OF OAKLEY
CONTRA COSTA COUNTY
STATE OF CALIFORNIA

I HEREBY CERTIFY THAT THE WITHIN MAP SHOWING ANNEXATION
No. 40 TO CITY OF OAKLEY COMMUNITY FACILITIES DISTRICT No. 2015-2
(PARKS, STREETLIGHTS, LANDSCAPE MAINTENANCE AND STORMWATER),
CITY OF OAKLEY, CONTRA COSTA COUNTY, STATE OF CALIFORNIA,
WAS APPROVED BY THE CITY COUNCIL OF THE CITY OF OAKLEY, AT A
REGULAR MEETING THEREOF, HELD ON THE ____ DAY OF
_____, 2024, BY ITS RESOLUTION No. _____.

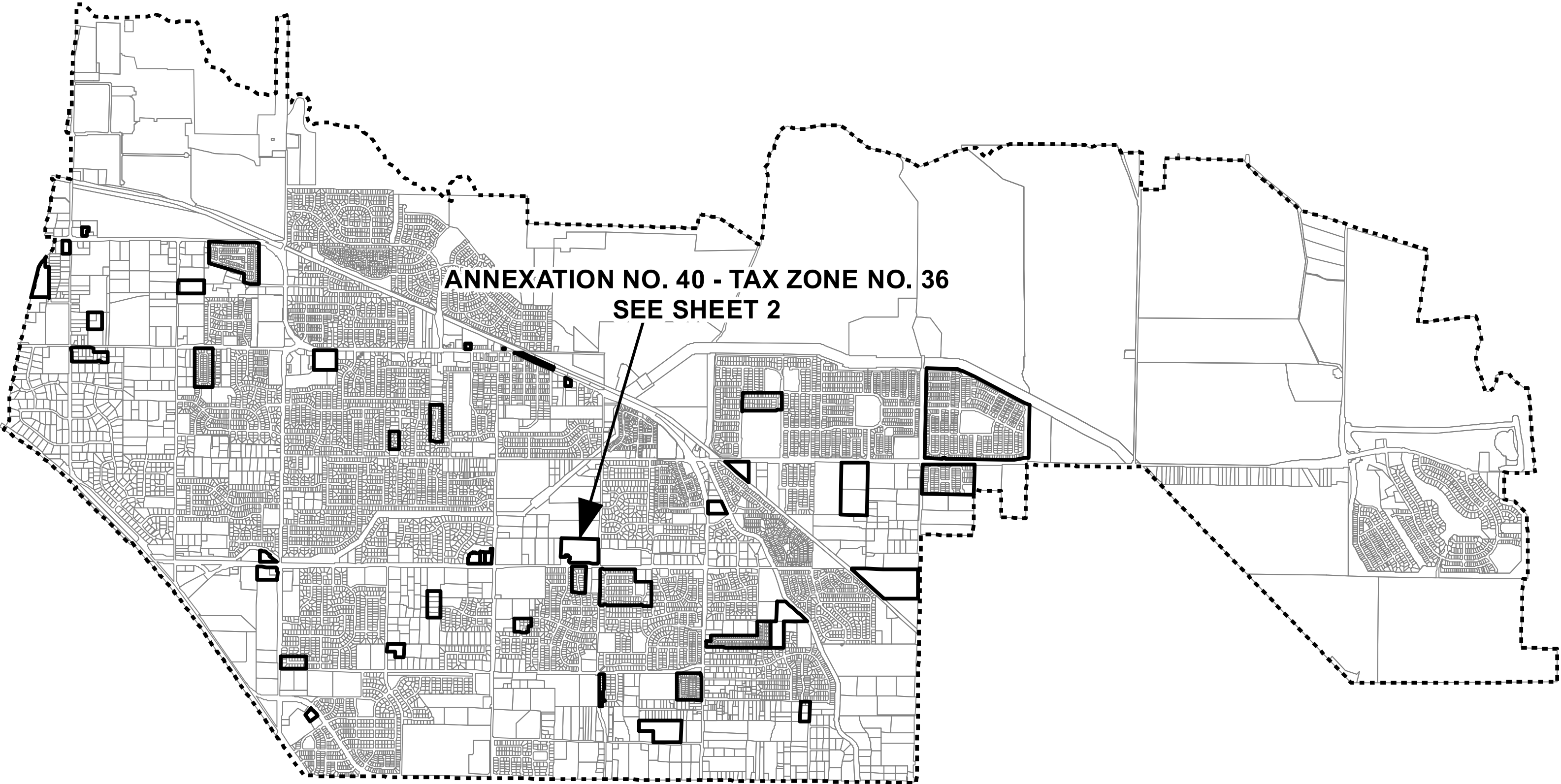
LIBBY VREONIS, CITY CLERK
CITY OF OAKLEY
CONTRA COSTA COUNTY
STATE OF CALIFORNIA

FILED THIS ____ DAY OF _____, 2024, AT THE HOUR
OF ____ M IN BOOK ____ OF MAPS OF ASSESSMENT
AND COMMUNITY FACILITIES DISTRICTS AT PAGE _____, DOCUMENT
No. _____ IN THE OFFICE OF THE COUNTY RECORDER
IN CONTRA COSTA COUNTY, STATE OF CALIFORNIA.

COUNTY RECORDER
CONTRA COSTA COUNTY
STATE OF CALIFORNIA

NOTE: THIS ANNEXATION MAP ANNEXES TERRITORY TO CITY OF OAKLEY
COMMUNITY FACILITIES DISTRICT No. 2015-2 (PARKS,
STREETLIGHTS, LANDSCAPE MAINTENANCE AND STORMWATER),
CITY OF OAKLEY, CONTRA COSTA COUNTY, STATE OF CALIFORNIA,
FILED IN THE OFFICE OF THE COUNTY RECORDER OF CONTRA
COSTA COUNTY, STATE OF CALIFORNIA, ON THE 9TH DAY OF
NOVEMBER, 2015 IN BOOK 85 OF MAPS OF ASSESSMENT AND
COMMUNITY FACILITIES DISTRICT AT PAGE 20.

ASSESSOR PARCELS WITHIN BOUNDARY: FOR PARTICULARS OF
LINES AND DIMENSIONS OF PARCELS, REFERENCE IS MADE TO
ASSESSOR'S PARCEL NO. 035-220-035-6.

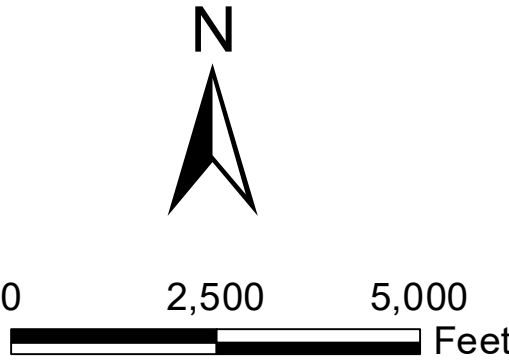


Legend

CFD No. 2015-2 Boundary

Oakley City Limits/CFD No. 2015-2 Future Annexation Area

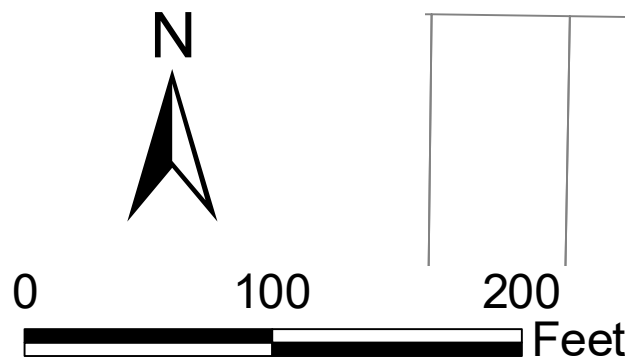
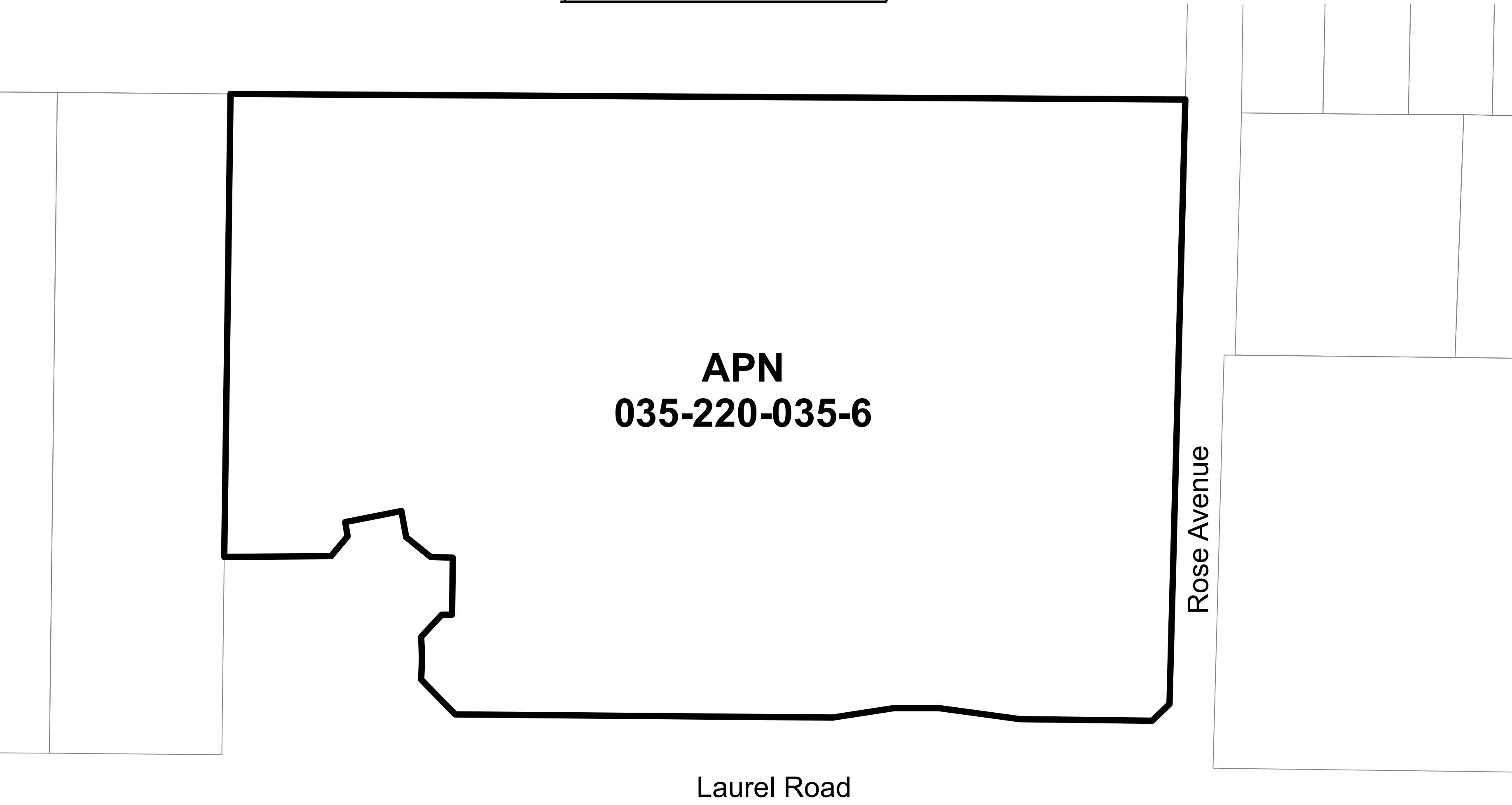
Parcel Lines



ANNEXATION MAP No. 40 TO
CITY OF OAKLEY COMMUNITY FACILITIES DISTRICT No. 2015-2
(PARKS, STREETLIGHTS, LANDSCAPE MAINTENANCE AND STORMWATER)

CITY OF OAKLEY
CONTRA COSTA COUNTY, STATE OF CALIFORNIA

Annexation No. 40 - Tax Zone No. 36
(Rosewood Estates SD 8787)



Legend

-  CFD No. 2015-2 Annexation Area No. 40
-  Parcel Lines

**RECORDING REQUESTED BY AND
AFTER RECORDATION RETURN TO:**

City Clerk
City of Oakley
City Hall
3231 Main Street
Oakley, California 94561

**AMENDMENT NO.41 TO
NOTICE OF SPECIAL TAX LIEN**

**CITY OF OAKLEY
Community Facilities District No. 2015-2
(Parks, Streetlight, Landscape and Stormwater Services)**

**Annexation No. 40 - Tax Zone No. 36
(Rosewood Estates SD 8787)**

Pursuant to the requirements of Section 3117.5 of the Streets and Highways Code of California and the Mello-Roos Community Facilities Act of 1982, as amended, section 53311, et seq., of the California Government Code (the "Act"), the undersigned City Clerk of the City of Oakley (the "City"), County of Contra Costa, State of California, hereby gives notice that a lien to secure payment of a special tax, which the City is authorized to levy, is hereby imposed on the property described herein. The special tax secured by this lien is authorized to be levied for the purpose of paying for certain municipal services set forth in that certain Notice of Special Tax Lien heretofore recorded in the Office of the County Recorder of the County of Contra Costa, State of California on January 19, 2016, as Document No. 20160009045, to which reference is hereby made and the provisions of which are hereby incorporated by this reference.

This Amendment No. 40 to Notice of Special Tax Lien amends the Notice of Special Tax Lien to add to the territory of the City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services) (the "CFD"). The territory included in the existing CFD is set forth in the map of the CFD heretofore recorded as Document No. 15-234174 in the Office of the County Recorder of the County of Contra Costa, State of California on November 9, 2015, in Book 85 at Page 20 of Maps of Assessment and Community Facilities Districts, to which reference is hereby made. The territory to be added is set forth in that certain "Annexation Map No. 40 to Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services), County of Contra Costa, State of California," heretofore recorded at _____ on _____, 2024, in Book _____ at Page _____ of Maps of Assessment and Community Facilities Districts in the office of the County Recorder of the County of Contra Costa, State of California.

The rate, method of apportionment, and manner of collection of the authorized special tax, as supplemented with respect to the annexation of the territory described herein to the CFD, is set forth in Exhibit B hereto and hereby made a part hereof. The lien of the special tax is a continuing lien which shall secure the annual levy of the special tax and which shall continue in force and effect until the special tax obligation is permanently satisfied and canceled in accordance with law or until the special tax ceases to be levied and a notice of cessation of special tax is recorded in accordance with Government Code Section 53330.5.

Notice is further given that upon the recording of this notice in the office of the county recorder, the obligation to pay the special tax levy shall become a lien upon all nonexempt real property within the territory to be added to the CFD in accordance with Section 3115.5 of the Streets and Highways Code.

The assessor's tax parcel(s) numbers of all parcels or any portion thereof which are included in this Amendment No. 40 to Notice of Special Tax Lien, together with the name(s) of the owner(s) thereof, as they appear on the latest secured assessment roll as of the date of recording hereof or as are otherwise known to the City are as set forth in Exhibit A hereto and hereby made a part hereof.

For further information concerning the current and estimated future tax liability of owners or purchasers of real property subject to this special tax lien, interested persons should contact the Finance Director of the City of Oakley, City Hall, 3231 Main Street, Oakley, California 94561, telephone number (925) 625-7000.

Dated: As of _____, 2024

By: _____
Libby Vreonis, City Clerk,
City of Oakley

EXHIBIT A

**CITY OF OAKLEY
Community Facilities District No. 2015-2
(Parks, Streetlight, Landscape and Stormwater Services)**

Annexation No. 40 – Tax Zone No. 36

**PARCEL DESCRIPTION AND OWNER OF LAND WITHIN
ANNEXATION NO. 40 – TAX ZONE NO. 36**

Assessor's Parcel No.

Name(s) of Property Owner(s)

035-220-035-6

ADS III HOLDINGS LLC

EXHIBIT B

CITY OF OAKLEY Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services)

SUPPLEMENT TO THE RATE AND METHOD OF APPORTIONMENT OF SPECIAL TAX – TAX ZONE NO. 36

Special Taxes in the City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services) (the “CFD” or “CFD No. 2015-2”) shall be levied and collected according to the tax liability determined by the Administrator through the application of the appropriate amount or rate for Taxable Property, as described below. All the property in CFD No. 2015-2, unless exempted by law or by the provisions of Section E herein, shall be taxed for the purposes, to the extent, and in the manner herein provided, including property subsequently annexed to CFD No. 2015-2, unless a separate Rate and Method of Apportionment of Special Tax is adopted for such annexation area.

Property annexed to City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services) pursuant to Annexation No. 41 will be annexed to Tax Zone No. 36 per the Supplement to the Rate and Method of Apportionment of Special Tax shown below.

A. DEFINITIONS

The terms hereinafter set forth have the following meanings:

“**Accessory Unit**” means a second residential unit of reduced size (e.g., granny cottage, etc.) that shares a Parcel with a Residential Unit.

“**Acre**” or “**Acreage**” means the land area of an Assessor’s Parcel as shown on an Assessor’s Parcel Map, or if the land area is not shown on an Assessor’s Parcel Map, the land area shown on the applicable Final Map or other recorded County parcel map.

“**Act**” means the Mello-Roos Community Facilities Act of 1982, as amended, being Chapter 2.5 (commencing with Section 53311), Division 2, of Title 5 of the Government Code of the State of California.

“**Administrative Expenses**” means the following actual or reasonably estimated costs directly related to the administration of CFD No. 2015-2: the costs of computing the Special Tax and preparing the annual Special Tax collection schedules (whether by the City or any designee thereof or both); the costs of collecting

the Special Taxes; the costs to the City, CFD No. 2015-2, or any designee thereof of complying with disclosure requirements associated with the Act; the costs associated with preparing Special Tax disclosure statements and responding to public inquiries, protests, or appeals regarding the Special Taxes; and the City's annual administration fees and third party expenses. Administrative Expenses shall also include amounts estimated or advanced by the City or CFD No. 2015-2 for any other administrative purposes of CFD No. 2015-2, including attorney's fees, costs associated with annexations to CFD No. 2015-2, and other costs related to commencing and pursuing to completion any foreclosure of delinquent Special Taxes.

"Administrator" means an official of the City, or any designee thereof, responsible for determining the Special Tax Requirement and providing for the levy and collection of the Special Tax.

"Assessor's Parcel" or **"Parcel"** means a lot or parcel shown on an Assessor's Parcel Map with an assigned Assessor's Parcel Number.

"Assessor's Parcel Map" means an official map of the County Assessor designating parcels by Assessor's Parcel Number.

"Assessor's Parcel Number" or **"APN"** means a unique number assigned to an Assessor's Parcel by the County Assessor for purposes of identifying a property.

"Authorized Services" means the public services authorized to be funded by CFD No. 2015-2 as set forth in the documents adopted by the Council when CFD No. 2015-2 was formed.

"Building Permit" means a building permit issued by the City and having a building structure improvement valuation over \$50,000. Building Permits for the construction of ancillary structures such as fences, swimming pools, retaining walls, etc. are excluded.

"CFD" or "CFD No. 2015-2" means the City of Oakley Community Facilities District No. 2015-2 (Parks, Streetlight, Landscape and Stormwater Services).

"City" means the City of Oakley.

"City Landscape Maintenance Standards" means the then applicable landscape maintenance standards or then applicable level of service for then applicable landscape maintenance contracts executed by the City that are in effect and relate to similar landscaping improvements.

"City Manager" means the City Manager of the City of Oakley.

“Commercial Unit” means an individual building structure for commercial uses as defined per the County Assessor (e.g., grocery stores, shopping centers, motel, hotel, service stations, and offices).

“Condominium Parcel” means a Parcel designated by the County Assessor as having a condominium, townhome, cluster home and co-op land use.

“Council” means the City Council of the City of Oakley, acting as the legislative body for CFD No. 2015-2.

“County” means the County of Contra Costa.

“County Assessor” means the Contra Costa County Assessor.

“County Land Use Code” means the land use code assigned to an Assessor’s Parcel as indicated in the records of the County Assessor.

“Developed Property” means, in any Fiscal Year, all Parcels of Taxable Property for which a Building Permit was issued by the City for construction of a residential structure or a non-residential structure on or prior to June 30 of the preceding Fiscal Year. In the absence of a Building Permit, any Parcel of Taxable Property shall be classified as “Developed Property” if it has been occupied by a user as determined by the Administrator on or prior to June 30 of the preceding Fiscal Year.

“Final Map” or “Parcel Map” means a final map approved by the City pursuant to the Subdivision Map Act (California Government Code Section 66410, *et seq.*) that creates individual lots on which a Building Permit can be issued for construction of Residential Units without further subdivision of the lots.

“Fiscal Year” means the period starting on July 1 and ending on the following June 30.

“Industrial” means an individual building structure for industrial uses as defined per the County Assessor (e.g., research and development, mini-warehouse, etc.).

“Institutional” means an individual building structure for institutional uses as defined per the County Assessor (e.g., churches, hospitals, assisted living, schools, etc.).

“Land Use Classification” means the current or intended use of a Taxable Parcel as determined by the Taxable Parcel’s County Land Use Code.

“Maximum Special Tax” means, for each Special Tax Component, the maximum Special Tax, determined in accordance with Section C herein, which can be levied in any Fiscal Year.

“Mixed Use Parcel” means a Parcel designated by the County Assessor as having a multiple land uses such as residential land uses and commercial land uses, or multi-family land uses and commercial land uses.

“Multi-Family Parcel” means a Parcel designated by the County Assessor as having a multi-family residential land uses which includes duplexes, triplexes, fourplexes and apartments.

“Non-Residential Parcel” means for each Fiscal Year, all Assessor Parcels designated by the County Assessor with a County Land Use Code of Commercial, Industrial, or Institutional. If it is determined by the Administrator that the County Assessor has assigned an incorrect County Land Use Code or the assigned County Land Use Code does not correctly describe the intended or current use of the Taxable Parcel, the Administrator may assign a Land Use Classification to the Taxable Parcel described in Section C below.

“Non-Residential Parcel – In Compliance” this definition only applies for the purpose of calculating the annual neighborhood parks and landscaping maintenance tax component and means for each Fiscal Year, an Assessor Parcel designated by the County Assessor with a County Land Use Code of Commercial, Industrial, or Institutional for which the Property Owner of the Commercial, Industrial, or Institutional Parcel has notified the City in writing by the preceding February 1st that it will maintain its parcel's frontage landscaping during the immediate following fiscal year and the City Manager or his/her designee has determined that the Property Owner has maintained its Parcel's frontage landscaping in previous Fiscal Years to City Landscape Maintenance Standards. In addition, in order for any Commercial, Industrial, or Institutional Parcel within a Tax Zone of CFD No. 2015-2 to be defined as a Non-Residential Parcel – In Compliance, all Non-Residential Parcels within the Tax Zone must also be defined as Non-Residential Parcel – In Compliance.

“Non-Residential Parcel – Out of Compliance” this definition only applies for the purpose of calculating the annual neighborhood parks and landscaping maintenance tax component and means for each Fiscal Year, an Assessor Parcel designated by the County Assessor with a County Land Use Code of Commercial, Industrial, or Institutional for which the Property Owner of the Non-Residential Parcel has not notified the City in writing by the preceding February 1st that it will maintain its parcel's frontage landscaping during the immediate following fiscal year or the City Manager or his/her designee has determined that the Property Owner has not maintained its Parcel's frontage landscaping in previous Fiscal Years to City Landscape Maintenance Standards. In addition, if any Non-Residential Parcel within a Tax Zone of CFD No. 2015-2 is defined as a Non-Residential Parcel – Out of Compliance, then all Non-Residential Parcels within the Tax Zone must also be defined as Non-Residential Parcel – Out of Compliance.

“Property Owner” means the Property Owner of record per current County Assessor records unless more current information is available such as recorded deed of sale, etc.

“Proportionately” means, for Developed Property, that the ratio of the actual annual Special Tax levied in any Fiscal Year to the Maximum Special Tax authorized to be levied in that Fiscal Year is equal for all Assessor’s Parcels of Developed Property. For Undeveloped Property, “Proportionately” means that the ratio of the actual annual Special Tax levied in any Fiscal Year to the Maximum Special Tax authorized to be levied in that Fiscal Year is equal for all Assessor’s Parcels of Undeveloped Property.

“Public Property” means, for each Fiscal Year: (i) any property within the boundaries of CFD No. 2015-2 that is owned by or irrevocably offered for dedication to the federal government, the State of California, the City or any other public agency; provided, however, that any property leased by a public agency to a private entity and subject to taxation under Section 53340.1 of the Act (as such section may be amended or replaced) shall be taxed and classified in accordance with its use; or (ii) any property within the boundaries of CFD No. 2015-2 that is encumbered by an unmanned utility easement making impractical its utilization for other than the purpose set forth in the easement.

“Residential Unit” means an individual building structure for residential or multi-family residential uses as defined per the County Assessor. An Accessory Unit that shares a Parcel with a Residential Unit shall not be considered a separate Residential Unit for purposes of this RMA.

“RMA” means this Rate and Method of Apportionment of Special Tax.

“Single-Family Parcel” means a Parcel designated by the County Assessor as having a single-family residential land use. If it is determined by the Administrator that the County Assessor has assigned an incorrect County Land Use Code or the assigned County Land Use Code does not correctly describe the intended or current use of the Taxable Parcel, the Administrator may assign a Land Use Classification to the Taxable Parcel described in Section C below.

“Special Tax” means any tax levied within CFD No. 2015-2 to pay the Special Tax Requirement, and includes each Special Tax Component.

“Special Tax Component” means one of the following components of the Special Tax: Community Park Maintenance Tax, Streetlighting Maintenance Tax, Neighborhood Parks and Landscape Maintenance Tax, or Stormwater Maintenance Tax.

“Special Tax Requirement” means, for each Special Tax Component, the amount of revenue needed in any Fiscal Year to pay for the following: (i) Authorized

Services related to the Special Tax Component; (ii) Administrative Expenses attributable to the Special Tax Component; and (iii) amounts needed to cover any delinquencies in the payment of the Special Tax Component which occurred in the previous Fiscal Year or, based on delinquency rates in prior years, may be expected to occur in the Fiscal Year in which the Special Tax will be collected.

“Taxable Property” or “Taxable Parcels” means all Assessors’ Parcels within the boundaries of CFD No. 2015-2 that are not exempt from the Special Tax pursuant to law or Section E herein.

“Tax Zone” means a mutually exclusive geographic area within which the Special Tax may be levied pursuant to this RMA. All the property within CFD No. 2015-2 at the time of CFD Formation is within Tax Zone 1. Additional Tax Zones may be created when property is annexed to CFD No. 2015-2, and a separate Maximum Special Tax shall be identified for property within the new Tax Zone at the time of such annexation. The Assessor’s Parcels included within a new Tax Zone established when such Parcels are annexed to CFD No. 2015-2 shall be identified by Assessor’s Parcel Number in the Unanimous Approval Form that is signed by the owner(s) of the Parcels at the time of annexation.

“Unanimous Approval Form” means that form executed by the record owner of fee title to a Parcel or Parcels annexed into CFD No. 2015-2 that constitutes the property owner’s approval and unanimous vote in favor of annexing into CFD No. 2015-2, the levy of the Special Tax against his/her Parcel or Parcels pursuant to this RMA.

“Undeveloped Property” means, in any Fiscal Year, all Parcels of Taxable Property in CFD No. 2015-2 that are not classified as Developed Property.

B. DATA FOR ANNUAL TAX LEVY

Each Fiscal Year, the Administrator shall identify the current Assessor’s Parcel Numbers for all Parcels of Taxable Property within CFD No. 2015-2. The Administrator shall also determine: (i) whether each Assessor’s Parcel of Taxable Property is Developed Property or Undeveloped Property, and (ii) the Special Tax Requirement for each Special Tax Component for the then-current Fiscal Year. Each Special Tax Component shall be levied only to pay for the related Special Tax Requirement.

In any Fiscal Year, if it is determined that (i) a Final Map or Parcel Map for a portion of property in CFD No. 2015-2 was recorded after the last date upon which the County Assessor will incorporate the newly-created Parcels into the then current tax roll, (ii) because of the date the Final Map or Parcel Map was recorded, the County Assessor does not yet recognize the new Parcels that will be created by the Final Map or Parcel Map, and (iii) one or more of the newly-created Parcels would meet the definition of Developed Property, the Administrator shall calculate the Special Tax for

the property affected by recordation of the Final Map or Parcel Map by determining the Special Tax that applies separately to each new Parcel that will be created by that Final Map or Parcel Map, then applying the sum of the individual Special Taxes to the Parcel that was subdivided by recordation of the Final Map or Parcel Map.

C. MAXIMUM SPECIAL TAXES

1. Developed Property - The Fiscal Year 2024-25 Maximum Special Tax for each Special Tax Component for all Parcels of Developed Property shall be as shown in Table 1 below:

Table 1: Developed Property		
Special Tax Component	Land Use Classification	FY 2024-25 Maximum Tax
Regional Park Maintenance Tax	Single-Family Parcel	\$170.12 per Parcel
Regional Park Maintenance Tax	Condominium Parcel	\$127.59 per Parcel
Regional Park Maintenance Tax	Multi-Family Parcel	\$85.06 per Unit
Regional Park Maintenance Tax	Non-Residential Parcel	\$510.36 per Acre
Community Parks Maintenance Tax	Single-Family Parcel	\$375.68 per Parcel
Community Parks Maintenance Tax	Condominium Parcel	\$281.76 per Parcel
Community Parks Maintenance Tax	Multi-Family Parcel	\$187.85 per Unit
Community Parks Maintenance Tax	Non-Residential Parcel	\$1,127.04 per Acre
Streetlighting Maintenance Tax	Single-Family Parcel	\$74.17 per Parcel
Streetlighting Maintenance Tax	Condominium Parcel	\$55.63 per Parcel
Streetlighting Maintenance Tax	Multi-Family Parcel	\$37.09 per Unit
Streetlighting Maintenance Tax	Non-Residential Parcel	\$222.52 per Acre
Neighborhood Parks & Landscaping Maintenance Tax	Single-Family Parcel	\$485.92 per Parcel
Neighborhood Parks & Landscaping Maintenance Tax	Condominium Parcel	\$364.44 per Parcel
Neighborhood Parks & Landscaping Maintenance Tax	Multi-Family Parcel	\$242.96 per Unit
Neighborhood Parks & Landscaping Maintenance Tax	Non-Residential Parcel - In Compliance	\$0.00 per Acre
Neighborhood Parks & Landscaping Maintenance Tax	Non-Residential Parcel - Out of Compliance	\$3,353.95 per Acre
Stormwater/Water Quality Maintenance Tax	Single-Family Parcel	\$298.06 per Parcel
Stormwater/Water Quality Maintenance Tax	Condominium Parcel	\$223.55 per Parcel
Stormwater/Water Quality Maintenance Tax	Multi-Family Parcel	\$149.03 per Unit
Stormwater/Water Quality Maintenance Tax	Non-Residential Parcel	\$2,057.27 per Acre

Mixed Use Parcels will have their Maximum Tax calculated each Fiscal Year based upon their combined uses on the Parcel. For example, if a one-acre parcel has commercial on the ground floor and 50 condominiums on the second floor the property owner will be charged the Non-Residential Parcel rate for one acre and the Condominium Parcel Rate for the 50 condominiums.

2. Undeveloped Property - The Fiscal Year 2024-25 Maximum Special Tax for each Special Tax Component for all Parcels of Undeveloped Property shall be as shown in Table 2 below:

Table 2: Undeveloped Property		
Special Tax Component	Land Use Classification	FY 2024-25 Maximum Tax
Regional Park Maintenance Tax	Single-Family Parcel	\$510.36 per Acre
Regional Park Maintenance Tax	Condominium Parcel	\$382.77 per Acre
Regional Park Maintenance Tax	Multi-Family Parcel	\$255.18 per Acre
Regional Park Maintenance Tax	Non-Residential Parcel	\$255.18 per Acre
Community Parks Maintenance Tax	Single-Family Parcel	\$1,127.04 per Acre
Community Parks Maintenance Tax	Condominium Parcel	\$845.28 per Acre
Community Parks Maintenance Tax	Multi-Family Parcel	\$563.52 per Acre
Community Parks Maintenance Tax	Non-Residential Parcel	\$563.52 per Acre
Streetlighting Maintenance Tax	Single-Family Parcel	\$222.52 per Acre
Streetlighting Maintenance Tax	Condominium Parcel	\$166.88 per Acre
Streetlighting Maintenance Tax	Multi-Family Parcel	\$111.27 per Acre
Streetlighting Maintenance Tax	Non-Residential Parcel	\$111.27 per Acre
Neighborhood Parks & Landscaping Maintenance Tax	Single-Family Parcel	\$3,353.95 per Acre
Neighborhood Parks & Landscaping Maintenance Tax	Condominium Parcel	\$3,353.95 per Acre
Neighborhood Parks & Landscaping Maintenance Tax	Multi-Family Parcel	\$3,353.95 per Acre
Neighborhood Parks & Landscaping Maintenance Tax	Non-Residential Parcel - In Compliance	\$0.00 per Acre
Neighborhood Parks & Landscaping Maintenance Tax	Non-Residential Parcel - Out of Compliance	\$3,353.95 per Acre
Stormwater/Water Quality Maintenance Tax	Single-Family Parcel	\$2,057.27 per Acre
Stormwater/Water Quality Maintenance Tax	Condominium Parcel	\$2,057.27 per Acre
Stormwater/Water Quality Maintenance Tax	Multi-Family Parcel	\$2,057.27 per Acre
Stormwater/Water Quality Maintenance Tax	Non-Residential Parcel	\$2,057.27 per Acre

3. Escalation of Maximum Special Tax

On July 1, 2025, and each July 1 thereafter, the Maximum Special Tax for each Special Tax Component for the current Fiscal Year for Developed Property and Undeveloped Property shall be increased from the Maximum Special Tax for the respective Special Tax Component for the previous Fiscal Year by Consumer Price Index – All Urban Consumers (San Francisco-Oakland-San Jose, CA) (from February) with a minimum annual increase of three (3.00%) percent and a maximum annual increase of five (5.00%) percent for any given year.

D. METHOD OF LEVY AND COLLECTION OF SPECIAL TAXES

Each Fiscal Year, the Administrator shall determine the Special Tax Requirement for each Special Tax Component for that Fiscal Year and levy each Special Tax Component on all Parcels of Taxable Property as follows:

Step 1: Each Special Tax Component shall be levied Proportionately on each Parcel of Developed Property up to 100% of the Maximum Special Tax for each Parcel of Developed Property for such Fiscal Year until the amount levied is equal to the Special Tax Requirement for such Special Tax Component;

Step 2: If additional revenue is needed after Step 1, each Special Tax Component shall be levied Proportionately on each Parcel of Undeveloped Property up to 100% of the Maximum Special Tax for each Parcel of Undeveloped Property for such Fiscal Year until the amount levied, when combined with the amount of the Special Tax Component levied pursuant to Step 1, is equal to the Special Tax Requirement for such Special Tax Component.

The Special Tax for CFD No. 2015-2 shall be collected at the same time and in the same manner as ordinary ad valorem property taxes provided, however, that the City may (under the authority of Government Code Section 53340) collect Special Taxes at a different time or in a different manner if necessary to meet the financial obligations of CFD No. 2015-2, and the Special Tax shall be subject to foreclosure if delinquent regardless of the manner in which it was collected.

E. EXEMPTIONS

No Special Tax shall be levied on Parcels of Public Property or any privately-owned Parcels that are non-developable, such as common areas, wetlands, and open space, parks, etc. except as otherwise provided in this RMA and in the Act.

F. INTERPRETATION OF SPECIAL TAX FORMULA

The City reserves the right to make minor administrative and technical changes to this document that does not materially affect the rate and method of apportioning Special Taxes. In addition, the interpretation and application of any section of this document shall be left to the City's discretion. Interpretations may be made by the City through a resolution of the Council for purposes of clarifying any vagueness or ambiguity in this RMA.

G. TERM OF THE SPECIAL TAX

The Special Tax shall be levied in perpetuity as necessary to pay the Special Tax Requirement.

H. REPEAL OF THE SPECIAL TAX

CFD No. 2015-2 was established to levy the Special Tax to finance the Authorized Services as a condition of the entitlement to develop the Developed Property in CFD No. 2015-2. If the levy of the Special Tax is repealed by initiative or any other action participated in by the owners of Parcels in CFD No. 2015-2, the City shall cease to levy the Special Tax and shall cease to be obligated to provide the Authorized Services for which the Special Tax was levied.

I. SEVERABILITY

The invalidity or unenforceability of any provisions of this Rate and Method of Apportionment of Special Tax shall not affect the validity or enforceability of any other provision of this Rate and Method of Apportionment of Special Tax, which shall remain in full force and effect.

DATE: September 24, 2024
TO: Joshua McMurray, City Manager
FROM: Libby Vreonis, City Clerk
SUBJECT: Adopt a Resolution Updating Job Classifications and Related Disclosure Categories as set forth in Chapter 9 of Title 2 of the Oakley Municipal Code Regarding the Conflict of Interest Code

Approved and
Forwarded to the
City Council

Background and Analysis

The overarching purpose of the California Political Reform Act is to help ensure that a public officer or employee, in the course of his or her official duties, is not involved in making, or participating in the making of decisions which may foreseeably have a material effect on any financial interest of the employee. To that end, Government Code Sections 87300, *et seq.*, require every local agency to promulgate a Conflict of Interest Code which contains (1) a specific listing of the positions within the City which involve the making, or participation in the making, of decisions which may foreseeably have a material effect on any financial interest, and (2) for each such position, the specific types of investments, business positions, interests in real property and sources of income which are reportable. All such designated employees are required to file an annual Form 700 Statement of Economic Interest.

In developing a disclosure list for the conflict of interest code, a "Designated Employee" is an officer, employee, member or consultant of an agency whose position is designated in the code because the position entails the making, or participation in the making, of governmental decisions which may foreseeably have a material effect on any financial interest. Making a governmental decision means the person: (1) votes on a matter; (2) appoints a person; (3) obligates or commits the City to any course of action; or (4) enters into any contractual agreement on behalf of the City. Participating in the making of a decision means the person: (1) negotiates, without significant substantive review, with a governmental entity or private person regarding the decision; or (2) advises or makes recommendations to the decision-maker by conducting research or an investigation, preparing or presenting a report, analysis or opinion which requires the exercise of judgment on the part of the employee and the employee is attempting to influence the decision.

It should be stressed that being listed as a designated employee (or not) does not relieve an individual from following any and all state statutes or FPPC regulations concerning conflicts of interest. This action is only an attempt by the City to appropriately notify the public of potential areas where a conflict may foreseeably arise as these individuals carry out their normal City duties.



The City's Conflict of Interest Code is provided in Chapter 9 of Title 2 of the Oakley Municipal Code which provides for the disclosure of assets and income of designated employees of the City which may be materially affected by their actions and, in appropriate circumstances, to provide that designated employees should be disqualified from acting in an order that would create a conflict of interest. Designated job classifications are subject to disclosure categories of which list is on file with the City Clerk's Office and available through the City's website. The Code allows changes to job classifications and disclosure categories to be made by resolution.

The Political Reform Act requires the City to conduct a biennial review of its Conflict of Interest Code on even-numbered years. The last update was September 2022.

Staff recommends the City Council add the following approved job classifications and related disclosure categories:

<u>Job Classification</u>	<u>Disclosure Categories</u>
• Accountant	2, 3, 4
• Accounting Technician	3, 5
• Administrative Services Director	1
• Administrative Supervisor	2, 3, 4, 5
• Assistant City Manager	3, 5
• Assistant Recreation Coordinator	4, 5
• Assistant or Associate Engineer	2, 4, 5
• Associate Planner	2, 5
• Chief Building Official	1
• Engineering Manager	2
• Finance Manager	2, 3, 4, 5
• Human Resources Manager	4, 5
• Payroll Specialist	3, 5
• Public Works Maintenance Foreman	5
• Public Works Maintenance Manager	3, 4, 5
• Recreation Manager	1
• Senior Permit Technician	5
• Senior Planner	2, 4, 5



Staff also recommends removing the following inactive positions:

- Accounting Manager
- Assistant to the City Manager
- Capital Projects Engineer
- Engineering Technician
- Human Resources Director
- Human Resources Technician
- Parks and Landscape Maintenance Division Manager
- Parks and Landscape Maintenance Foreman
- Permit Center Manager
- Planning Manager
- Planning Technician
- Principal Engineer
- Recreation Director
- Senior Accounting Technician
- Streets Maintenance Foreman

Consistency with the Oakley Strategic Plan 27+

Updating the City's Conflict of Interest Code biennially helps to communicate and uphold the City's information systems to reinforce transparency and access to build trust by maintaining a current database and public access to filings made by Conflict of Interest Code filers, consistent with subgoals of the Strategic Plan 27+ Community and Collaborative Partnerships Goal.

Fiscal Impact

None

Staff Recommendation

Staff recommends the City Council adopt a resolution updating job classifications and their related disclosure categories for the City's Conflict of Interest Code.

Attachments

1. Resolution
2. Appendix



RESOLUTION NO. XX-24

**A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF OAKLEY
UPDATING JOB CLASSIFICATIONS AND RELATED DISCLOSURE CATEGORIES
AS SET FORTH IN CHAPTER 9 OF TITLE 2 OF THE OAKLEY MUNICIPAL CODE
REGARDING THE CONFLICT OF INTEREST CODE**

BE IT RESOLVED that the job classifications and related disclosure categories as set forth in Chapter 9 of Title 2 of the Oakley Municipal Code are hereby updated as provided in the attached Exhibit "A" and is hereby approved by the Oakley City Council.

PASSED AND ADOPTED by the City Council of the City of Oakley this 24th day of September, 2024 by the following vote:

AYES:

NOES:

ABSTENTION:

ABSENT:

APPROVED:

Anissa Williams, Mayor

ATTEST:

Libby Vreonis, City Clerk

Date

City of Oakley Conflict of Interest Code

Disclosure Categories and Designated Positions

Designated positions as updated and proposed below are required to file the Fair Political Practices Commission Statement of Economic Interest Form 700. The disclosure categories for such designated positions are adopted and described as follows:

Disclosure Category 1: Interests in real property located within the jurisdiction or within two miles of the boundaries of the jurisdiction or within two miles of any land owned or used by the agency; and investments and business positions in business entities; and income, including loans, gifts, and travel payments from all sources.

Disclosure Category 2: Interests in real property located within the jurisdiction or within two miles of the boundaries of the jurisdiction or within two miles of any land owned or used by the City.

Disclosure Category 3: Investments and business positions in business entities; and income, including loans, gifts, and travel payments, from sources that provide services, supplies, materials, machinery, or equipment of the type utilized by the City.

Disclosure Category 4: Investments and business positions in business entities; and income, including loans, gifts, and travel payments, from sources that provide services, supplies, materials, machinery, or equipment of the type utilized by the department or division to which the designated employee is assigned duties.

Disclosure Category 5: Investments and business positions in business entities; and income, including loans, gifts, and travel payments, from sources that are of the type to request an entitlement from the City, or an entitlement to use City property or facilities, including but not limited to:

- A license;
- A vendor permit;
- A use permit;
- A regulatory permit;
- A grant or other form of financial assistance;
- Any development-related permit or entitlement.

Designated Employee	Disclosure Categories
<u>Accounting Manager</u>	<u>Categories 2,3,4,5</u>
<u>Accountant</u>	<u>Categories 2, 3, 4</u>
Administrative Hearing Officer	Category 1
<u>Administrative Services Director</u>	<u>Category 1</u>
<u>Accounting Technician</u>	<u>Categories 3, 5</u>
<u>Administrative Supervisor</u>	<u>Category 2, 3, 4, 5</u>
Assistant City Attorney	Category 1
<u>Assistant City Manager</u>	<u>Categories 3, 5</u>
<u>Assistant Recreation Coordinator</u>	<u>Categories 4, 5</u>
<u>Assistant/Associate Engineer</u>	<u>Categories 2, 4, 5</u>
<u>Associate Planner</u>	<u>Categories 2, 5</u>
<u>Assistant to the City Manager</u>	<u>Categories 3, 5</u>
Building Inspector	Categories 2, 5
<u>Chief Building Official</u>	<u>Category 1</u>
<u>Capital Project Engineer</u>	<u>Categories 2,4,5</u>
Chief of Police	Category 1
City Clerk	Category 1
City Engineer / Public Works Director	Category 1
City Surveyor	Category 1
Code Enforcement Officer	Categories 2, 3, 4
Code Enforcement Technician	Categories 2, 3, 4
Community Development Director	Category 1
Deputy City Clerk	Categories 2, 3, 4
Economic Development Analyst	Category 1,
<u>Engineering Technician</u>	<u>Category 2,</u>
<u>Engineering Manager</u>	<u>Category 2</u>
<u>Finance Manager</u>	<u>Categories 2, 3, 4, 5</u>
<u>Human Resources Director</u>	<u>Category 1</u>
<u>Human Resources Technician</u>	<u>Category 5</u>
<u>Human Resources Manager</u>	<u>Category 4,5</u>
IT Manager	Categories 4, 5
Paralegal	Categories 2, 3, 5

Formatted Table

Park Ranger	Categories 2, 4, 5
~~Parks and Landscape Maintenance Foreman~~	~~Category 5~~
~~Payroll Specialist~~	~~Categories 3, 5~~
~~Permit Center Manager~~	~~Category 1~~
Permit Technician	Category 5
~~Planning Manager~~	~~Categories 2, 4, 5~~
~~Planning Technician~~	~~Categories 2, 5~~
Police Lieutenant	Categories 2, 3, 4
Police Records Supervisor	Category 4
Police Sergeant	Categories 2, 3, 4
~~Principal Engineer~~	~~Categories 2, 4, 5~~
Public Works Inspector	Categories 2, 5
~~Public Works Maintenance Foreman~~	~~Category 5~~
~~Public Works Maintenance Manager~~	~~Categories 3, 4, 5~~
Recreation and Events Coordinator	Categories 4, 5
~~Recreation Director~~	~~Category 1~~
~~Recreation Manager~~	~~Category 1~~
Senior Accounting Technician	Categories 3, 5
~~Senior Permit Technician~~	~~Category 5~~
~~Senior Planner~~	~~Categories 2, 4, 5~~
Streets Maintenance Foreman	Category 5

Formatted Table

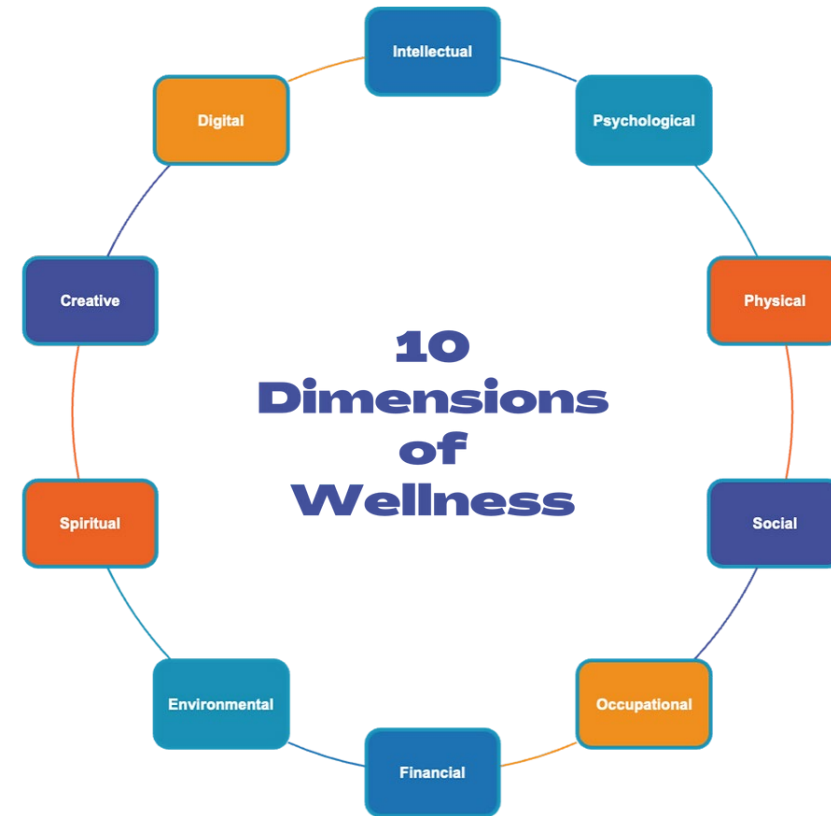
Formatted Table



City Update

8/9 thru 9/16

RESIDENT SERVICES



ENRICHMENT & EMPOWERMENT 2024 PROJECTED SERVICE HOURS: 1089+ HOURS

*THESE HOURS DO NOT INCLUDE SPECIAL
EVENTS OR FOOD STABILITY PROGRAMS

January 8 hr. Adult Classes 1 hr. Community event 45 hr. Youth program 10 hr. flex time <u>24 hr. Office time</u> 88 total hours February 8 hr. Adult Classes 2 hr. Community event 45 hr. Youth program 3 hr. social services 10 hr. flex time <u>26 hr. Office time</u> 94 total hours March 8 hr. Adult Classes 4 hr. Community event 45 hr. Youth program 3 hr. social services 10 hr. flex time <u>24 hr. Office time</u> 94 Total hours April 8 hr. Adult Classes 1 hr. Community event 45 hr. Youth program 10 hr. flex time <u>26 hr. Office time</u> 90 Total hours May 8 hr. Adult Classes 45 hr. Youth program 3 hr. social services 10 hr. flex time <u>24 hr. office time</u> 90 Total hours	June 8 hr. Adult Classes 45 hr. Youth program 3 hr. social services 10 hr. Flex time <u>24 hr. Office time</u> 90 Total hours July 8 hr. Adult Classes 1 hr. Community event 45 hr. Youth program 10 hr. Flex time <u>26 hr. Office time</u> 90 Total hours August 8 hr. Adult Classes 2 hr. Community event 45 hr. Youth program 3 hr. social services 10 hr. Flex time <u>24 hr. office time</u> 92 Total hours September 8 hr. Adult Classes 45 hr. Youth program 3 hr. social services 10 hr. Flex time <u>24 hr. Office time</u> 90 Total hours October 8 hr. Adult Classes 2 hr. Community event 45 hr. Youth program 10 hr. Flex time <u>26 hr. Office time</u> 91 Total hours	November 8 hr. Adult Classes 2 hr. Community event 45 hr. Youth program 3 hr. social services 5 hr. Flex time <u>28 hr. office time</u> 91 Total hours December 8 hr. Adult Classes 2 hr. Community event 45 hr. Youth program 10 hr. Flex time <u>24 hr. office time</u> 89 Total hours Annual Totals: 1,089 hours <u>Explanation of Staff Choice Flex workdays:</u> Staff workdays are flex days. Each month offers two flex days. Site staff can choose to schedule other events/activities on these days. They can also catch up on marketing, shopping for supplies, do office work. <u>Explanation of office time:</u> Staff is allocated office time from 12:30-2:30 on many days. Office time is used for making phone calls, doing outreach, providing one on one assistance to residents that is not a normally scheduled time on the calendar, sending emails, ordering supplies, printing materials, marketing, handing out fliers and calendars. Organizing binders. Preparing for the class or event of the day. <u>Availability of staff:</u> Designated resident services personnel shall have availability to work on site from 12:30-5:30 Mon - Fri. For additional on demand needs for time sensitive issues residents may be facing office staff is available from 9:00-11:30 Mon – Thurs to provide individualized one on one quick service referral support. With 9+ sessions averaging 15 mins each total to 2.25+ hours each month.	96 hours of adult education and skill building classes 17+ hours of whole life wellness and community building events 540 hours of youth programing 415 hours of service time in the office and to the community 21 hours of one-on-one social services health/wellness/life skills/financial meeting appointments for individualized supportive counseling. 27+ hours minimum of whole life wellness individualized support. Provided on demand via walk/call in during office time. To serve the resident's time sensitive critical needs. 24 hours approximately of unlisted additional health and whole life wellness and financial services and social events programs, tax preparation, workshops, fairs, annual medical renewal counseling, fraud prevention, food bank services as well as guest visits from local social service organizations that come to provide health or wellness group activities, counseling and support services at the site are in addition to these hour counts. These events are added throughout the year and average to about 4 hours per month. * Food Stability hours are not listed. These hours are not on the master calendar because the programs vary. Please see flyers for hours.
--	--	---	---

August 2024



Calendar



RESIDENT SERVICES PORTAL

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1 12:30 Online class training, financial/wellness resources. 2:30-5:30 Youth Program	2 Back to School Event Backpack giveaway	3
4	5	6 2:30-5:30 Youth Program 3:30-5:30 National Night Out	7 2:30-5:30 Youth Program 5:00 Panera Bread	8 12:30 Life wellness Employment Development. VIAL OF LIFE 2:30-5:30 Youth Program	9	10
11	12	13 2:00 Food Bank 2:30-5:30 Youth Program	14 10:00 Food Bank 2:30-5:30 Youth Program 5:00 Panera Bread	15 12:30 Save money thru Healthy Living. 2:30-5:30 Youth Program	16 11:00 Coffee with Katie 2:30-5:30 Youth Program	17
18	19 2:30-5:30 Youth Program	20 2:30-5:30 Youth Program	21 2:30-5:30 Youth Program 5:00 Panera Bread	22 12:30 Financial wellness matters. 2:30-5:30 Youth Program	23 2:30-5:30 Youth Program	24
25	26 2:30-5:30 Youth Program	27 2:00 Food Bank 2:30-5:30 Social Work meetings by appointment	28 10:00 Food Bank 2:30-5:30 Youth Program 5:00 Panera Bread	29	30	31

September 2024 Calendar



RESIDENT SERVICES PORTAL

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	2 CLOSED Labor Day	3	4	5 12:30 Online class training, financial/wellness resources. 2:30-5:30 Youth Program	6	7
8	9 2:30-5:30 Youth Program	10 2:30-5:30 Youth Program	11 2:30-5:30 Youth Program	12 12:30 Life wellness Employment Development. 2:30-5:30 Youth Program	13 2:30-5:30 Youth Program	14
15	16 2:30-5:30 Youth Program	17 2:30-5:30 Youth Program	18 2:30-5:30 Youth Program	19 12:30 Save money thru Healthy Living. 2:30-5:30 Youth Program	20	21
22	23 2:30-5:30 Youth Program	24 2:30-5:30 Social Work meetings by appointment	25 2:30-5:30 Youth Program	26 12:30 Financial wellness matters. 2:30-5:30 Youth Program	27 2:30-5:30 Youth Program	28
29	30 2:30-5:30 Youth Program					

October 2024 Calendar



Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2 2:30-5:30 Youth Program	3 12:30 Online class training, financial/wellness resources. 2:30-5:30 Youth Program	4 2:30-5:30 Youth Program	5
6	7 2:30-5:30 Youth Program	8 2:30-5:30 Youth Program	9 2:30-5:30 Youth Program	10 12:30 Life wellness Employment Development. 2:30-5:30 Youth Program	11	12
13	14 CLOSED Columbus Day	15	16 2:30-5:30 Youth Program	17 10:17 GREAT SHAKE OUT 12:30 Save money thru Healthy Living. 2:30-5:30 Youth Program	18 2:30-5:30 Youth Program	19
20	21 2:30-5:30 Youth Program	22 4:00-5:00 Community Watch Meeting	23 2:30-5:30 Youth Program	24 12:30 Financial wellness matters. 2:30-5:30 Youth Program	25	26
27	28 2:30-5:30 Youth Program	29	30 2:30-5:30 Youth Program	31 2:30-5:30 Youth Program 3:00-5:00 FALL FESTIVAL EVENT		

FREE Computer Class

5 households served

We can help you:

- Navigate the web: Seek out financial advice by browsing finance blogs. Sign up for online banking or bill pay. Create an E-mail. Learn to sell on the web. Sign up for money saving social service programs and find local resources.
- Build skills & get a better job: Learn Microsoft Office Applications with in depth training curriculum specialized for each program. Take FREE online college courses. Increase your typing speed with typing tests
- Self improvement: Take GED practice tests. Learn a new language. Prepare for citizenship testing with online facts and practice tests.
- Manage your health care: Use the internet to connect with health care professionals. Get signed up for online medical charts with your health care provider. Shop for health insurance.



RESIDENT SERVICES PORTAL



Class Information

Due to Covid and the need for social distancing we will be offering computer classes with two attendees at a time by appointment. You can also log in and participate remotely, ask for details.

Date:

1st Thursday of every month.

*Appointments available at 12:30 and 1:30.

Where:

Computer room.

***Please make an appointment with site staff.**



"This institution is an equal opportunity provider and employer."

Employment Development

Details

When:

2nd Thursday of
every month at
12:30 pm.

We will offer (2)
one on two in
person counseling
meetings by
appointment at
12:30 and 1:30. You
will receive
additional
personalized
assistance as well
as resume help.

* Please call the
office to make your
appointment.

Local job listings
handout available
for pick up.



Do you need to help with your search for employment?

Corporation for Better Housing offers FREE
Employment Counseling Workshops to all
residents.

We are here to help you with:

- ✓ Interview Skills
- ✓ How to dress for success
- ✓ Employment Search
- ✓ Resume Building
- ✓ Career Counseling



5 households served

4 households served



Free health class for all residents.

This Month's Topic:

Learn how healthy living improves your financial life.

Health improvement and financial improvement have a lot in common and the positive effects can be profoundly life-altering. When you take steps to improve your health, they often also cause improvements in your financial life, too.

When: Third Thursday of August

12:30 pm in the Community Room



Upcoming September



Free health class for all residents.

This Month's Topic:

How to control your
Cholesterol in an affordable
way



When: Third Thursday of the month @ 12:30

We will meet in the community room at 50% capacity.

Remote Zoom participation is available for those
uncomfortable with in person meetings - sign up for log in info.



October



Save money through healthy living!

Free health class for all residents.

This Month's Topic:

Benefits of Following an Alkaline Diet.
Yes being healthy is AFFORDABLE!

When: 3rd Thursday at 12:30 pm

We will meet in the community room. Handouts are available to those who do not wish to attend in person classes.



Financial Matters



5 households served

Credit Card Smarts

Why smart responsible use of credit cards

Fourth Thursday of August @ 12:30

In the Community Room

September

Financial Matters



Cut Stress - 12 Ways to Prepare Your Finances for the upcoming Holiday Season:

If being more thoughtful about managing your money was at the top of your New Year's resolutions list this past January, start your holiday planning now so you are ready and stress free this December.

Fourth Thursday of September @ 12:30
In the community room.

DETAILS

Date:
3rd Thursday of the
month

Time:
12:30pm

Location:
The Community Room



October

FREE TV

How to stop paying for cable!

How to Save Money on Cable

Eleven ways to cut the cable cord!

Everyone has different wants when it comes to the television they watch.

But most are over paying to watch TV.

This class will offer you 11 ways you can potentially reduce your cable bill or if you're brave enough get rid of it all together.

Did you know there are ways to watch television absolutely FREE!

No need to pay huge cable bills every month.



FREE Fruits & Veggies!



62 households served

**We have partnered with the Contra Costa
Food Bank to give away Free Fruits & Veggies!**

When: Second & Fourth Tuesday of each month.

Time: 2:00 p.m.

Location: In Front of Building 53 – Masks Required



SENIOR FOOD BANK

Fruits & Veggies!



36 households served

We have partnered with the Contra Costa Food Bank to give away Free Fruits & Veggies!

When: Second & Fourth Wednesday of each month.

Time: 10:00-11:00 a.m.

Location: Near Building 59

nutrition 4 health





PANERA BREAD DONATION DAY

The Oaks will be distributing
Panera bread, bagels and
pastries to residents every
Wednesday.

When: Wednesday's

Time: 5:00pm - 6:30pm

Where: 73 Community Rm

- Bring a bag or zip-lock
for your items.



103 households served



Food Box Distribution Day

**The Oaks will be
distributing food boxes to
residents today.**

**Where: Building 73 community
room**

When: 5:00 - 6:00pm

**Limited Quantity
Bring bags/ carts**



October

Community Meeting

DETAILS:

When

Fourth Tuesday of:

- January
- April
- July
- October

Where

In the Community Room.

*Masks are required. To follow social distancing protocol, we will only meet at 50% room capacity. First come first serve on attendance.

Time

4:00-5:00 pm



Get involved!

Become a positive contributing citizen.

Join Police or Fire Dept or Other Safety Advisory Organization, your neighbors, and friendly staff at our Neighborhood watch & Tenant Council Community meeting.

We will discuss topics that concern our community and safety as well as plan resident sponsored community events.

We encourage you to come be an involved and positive part of this community.

9 households served



Koffee With Katie



Join your neighbors and friendly staff for light refreshments, while discussing property updates.

When: Friday August 16th
Where: 51 Community Room
Time: 11:00 - 12:00pm



16 households attended



**The Oaks is launching
a Tenant Community
Group and needs your
help!**



**We're looking for volunteer residents who
want to promote resident participation in
the community and improve the quality of
life here at The Oaks. Members of TCG
(Tenant Community Group) will activity work
with the management team to assist in
suggesting solutions on social issues like:
Community needs, safety, resident lead
events and more.**

***Further details at Meeting**



**When: Thursday,
September 5th
Where: Building 53
Community Room
Time: 5:30 - 7pm**



The Oaks
Tenant Community Council Group

Volunteer! for The Elections Committee



**The Oaks Tenant community
group council is forming and
needs your help! We are looking
for 10 volunteers to help
coordinate The Oaks Tenant
Community Council Group
election.**



**Stop by the office to submit your
name to help elect YOUR Tenant
Community Group members.**

79 kids served in Aug

41 kids served in Sept as of 9/12



Calling all the kids and teens!

Homework Help - Crafts - Sports – Learning

When:

Monday – Friday
*** On calendared days**

Time:

2:30 – 5:30 p.m.

*** Masks required**

FREE

**Youth Program for all
registered youth ages 5-17.**

**Parents sign your kids up for
some fun!**

*** Program operating at
limited capacity to observe
covid social distancing
protocol. 10 kids per day**



27 individuals received one on one service in Aug.

10 individuals received one on one service so far in Sept.

A Social Service Worker Is Onsite Ready To Assist You

Did you know help is only a phone call away?



**** You can call our Resident Service program leader and get help, get referrals, connect to social services and government assistance programs, get counseling services or assistance with a general need.**



Onsite Resident Services Program Leader Name:									
Phone Number:									
Email:									
By appointment meeting hours are as follows:	We offer nine 20 min appointments between 2:30 to 5:30 pm on the 4th Tuesday of the following months.... <table><tr><td>February 22nd</td><td>March 22nd</td><td>May 24th</td><td>June 28th</td></tr><tr><td>August 23rd</td><td>September 27th</td><td>November 29th</td><td></td></tr></table>	February 22 nd	March 22 nd	May 24 th	June 28 th	August 23 rd	September 27 th	November 29 th	
February 22 nd	March 22 nd	May 24 th	June 28 th						
August 23 rd	September 27 th	November 29 th							



114 households served



**Join your neighbors and
friendly staff for a fun filled
day of food, games & raffles!**



**Patriotic best
dressed contest!**



**Backpack & school
supplies**



**In Partnership with
Xfinity, AT&T &
Complete Solutions &
Sourcing**



**Presentation by:
Oakley PD**





JOIN US TO GET PREPARED FOR ANY EMERGENCY

Please Join our community coordinator, Janelle for a Vial of L.I.F.E workshop, where she'll show residents how to prepare their medications in case of an emergency.

12 households served

You will fill a vial with a one-day supply of your medications and keep it in the designated spot for quick grab and go in the event of an emergency or evacuation.

**Please bring large empty pill bottles.*

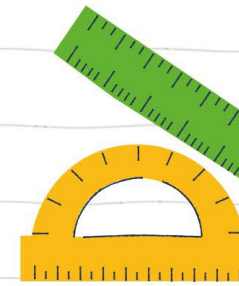
**All buildings on Thursdays
at 12:00 - 12:30pm**

Building 59: August 8th
Building 67: August 15th
Building 81: August 22nd
Building 65: August 29th





The Oaks Welcomes Students



54 kids served



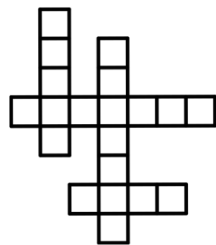
Friday, August 2nd
Basketball court
5:00 - 6:00pm

Backpacks
School supplies
Children's Raffle

Hot Dogs & Snow
Cones



SPONSORED BY XFINITY



Sacred Hands Senior Activity Day



Join your community coordinator,
Janelle and Sacred Hearts
representative Henryetta for a fun
filled hour of games and range of
motion activities to strengthen the
Mind & Body!



When: Thursday September 5th
Where: Building 73 Comm. Room
Time: 12:00 - 1:00pm

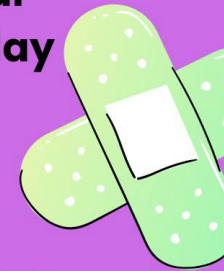




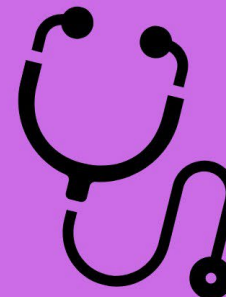
PACE Healthcare Event



**Are you a Senior, 55+ Living at home? A
Pace healthcare representative from
CEI (Center of Elders Independence)
will be on site to offer residents
information on how their medical
benefits can improve their everyday
life.**



**When: Thursday September 12th
Where: 73 Community room
Time: 12:30 -1:30pm**





THE OAKS

ICE CREAM SOCIAL

**THURSDAY
SEPTEMBER 26TH**

**WHERE: BUILDING 69 COMMUNITY
ROOM\ BASKETBALL COURT
TIME: 5:00 - 6:00PM**





Community Rummage sale

Lighten the load by thinning down on the excess personal items and home goods you no longer need. Clear out your clutter and make room to organize and tidy up

**Saturday
September 28th**

RSVP in the office no later than September 20th to be assigned a selling space.

Time of event

9am – 2:00pm

Be entirely cleaned up by 3:00pm.

Those who do not clean-up entirely will be charged a \$200.00 clean up and disposal fee.



Details:

Bring your own selling tables, chairs, and price tags.

Staff cannot assist you in moving or carrying your items in any way.

Your unsold furniture, electronics, kitchen appliances or large items cannot be put in the dumpster or disposed of onsite, you must take them to the dump or Goodwill. You may only dispose of household trash that fits in a standard trash bag onsite.





COMMUNICATION TO RESIDENTS



EMAIL BLASTS TO RESIDENTS

BLASTS ARE FREQUENTLY SENT OUT TO RESIDENTS AS REMINDERS OR INFORMATIONAL UPDATES TO KEEP OPEN COMMUNICATION WITH ALL RESIDENTS.

A SAMPLING OF A FEW OF THE THINGS SENT OUT SINCE 8/8:

Janelle Finklea Property Staff

Hello The Oaks Residents,

Managment would like to send a friendly reminder regarding patios and balconies.

Per section 11 of your lease " Balconies and patios shall be kept neat and clean at all times. No rugs, towels, laundry, clothing, appliances or other items shall be stored, hung or draped on railings or other portions of balconies or patios. Residents shall be mindful that their use of patios or balconies does not cause any hazards or damage of any kind or contribute to unsightly appearances on the exterior of the dwelling. No misuse of the space is permitted, including but not limited to, throwing, spilling or pouring liquids or other items, weather intentionally or negligently over balconies or patios."

Residents who are found in violation of the above statement will be receiving a lease violation.

Thank you for your corporation,

The Oaks Management

Janelle Finklea Property Staff

Hello The Oaks Residents,

The Oaks office wanted to inform residents that we have at home covid-19 testing kits available for residents.

Please stop by the office any day Monday - Friday from 8:30 - 4:30pm to pick up an at home test.

- Max 2 at home test per household

Thank you,

The Oaks Management

Janelle Finklea Property Staff

Good Morning The Oaks Residents,

As you know, The Oaks Apartments are a non-smoking property. Residents are not allowed to smoke in their unit nor on their balconies. The purpose of this document is to inform The Oaks's residents about our non-smoking policy. Residents suspected of violating our policy will be given a smoking violation.

Please consider this notice as a warning that such activity is not acceptable and is a violation of your lease agreement. Further violations could result in the commencement of legal action for your eviction.

The Oaks Management

Janelle Finklea Property Staff

Good Morning, The Oaks Residents,

We have noticed the appearance of grocery/ shopping carts on the property has increased and we would like to remind residents that all grocery/shopping carts cannot be left in hallways or common areas.

- Please park all shopping carts outside the building, near the trash rooms/area.

The Oaks Management

August 13, 2024 9:17 AM

August 8, 2024 1:01 PM

August 12, 2024 9:21 AM



NOTICES DELIVERED TO RESIDENTS

PAPER NOTICES ARE DELIVERED TO RESIDENTS AS INFORMATIONAL UPDATES TO KEEP OPEN COMMUNICATION WITH ALL RESIDENTS.

A SAMPLING OF A FEW OF THE THINGS SENT OUT SINCE 8/8:

Janelle Finklea Property Staff

August 27, 2024 5:31 PM

Hello The Oaks Residents,

The oaks would like to inform residents that our trash compactor was broken. It has been repaired and trash will be pick up tomorrow morning as scheduled.

We apologize for any inconvenience this may have caused.

The Oaks Managment

Janelle Finklea Property Staff

September 3, 2024 9:32 AM

Dear Oaks Residents,

Today is the 3rd of the month and we would like to remind residents that all rent is due by the 1st of the month. The last day that a resident may submit rent without incurring a late fee is the 5th of each month.

Please stop by the office or pay online at active building to make your rent payment.

The Oaks Managment

Janelle Finklea Property Staff

September 5, 2024 4:02 PM

Hello The Oaks Residents!

Today is The day!

We are excited to announce that The Oaks is launching A Tenants Community Group!

We're looking for volunteer residents who want to promote resident participation in the community and improve the quality of life here at The Oaks. Members of TCG (Tenant Community Group) will activity work with the management team to assist in suggesting solutions on social issues like: Community needs, safety, resident lead events and more.

Stop by building 53 community room on Today, September 5th at 5:30 to learn more about The Oaks Tenant Community Group!

The Oaks Managment



OPERATIONS



TOWING

STAFF WALKS THE PROPERTY TO CHECK FOR CARS WITHOUT REGISTRATION OR PERMITS ONCE PER MONTH.

	August	Sept
Tagged	9	6
Towed	4	3

A SAMPLE OF BLASTS SENT OUT TO REMIND RESIDENTS ABOUT AUTHORIZED VEHICLE PARKING RULES:

Janelle FinkleaProperty Staff

July 19, 2024 9:24 AM

Good Morning, The Oaks Residents,

Managment would like to send a friendly reminder regarding parking and your vehicles.

- 1) All residents must have Green Oaks parking permit visible in their vehicle.
- 2) No parking in designated "future leasing" parking spots in front of building 69 during business hours.
- 3) Vehicles may not be stored/ left in a parking stall for an extended period of time.
- 4) Vehicles with a flat tire, on blocks, or other conditions rendering it inoperable
- 5) Has no current license plate or no current registration
- 6) Do Not exit out of the entrance gate,

- Violators will be towed

Thank you,

The Oaks Managment

Lease Violations

LIHTC Tenant Protections - Good Cause for Eviction

Owners of LIHTC properties must have documented good cause to evict tenants. The good cause requirement provides a protection to ensure that low-income tenants can remain in their homes. Some states such as California have implemented the good cause requirement by requiring all LIHTC properties to have a good cause lease rider and providing all tenants with a letter informing them of their rights. Advocates work with agencies to implement good cause because of the due process protections it provides to tax credit tenants. In California, having a just cause is a requirement for removing or evicting a tenant who has continuously occupied a rental unit for at least 12 months. There are two types of just cause evictions—at-fault just cause evictions and no-fault just cause evictions. In simple terms, when a tenancy is terminated based on the fault of a tenant this is considered an at-fault eviction. This would be the case if, for example, a tenant does not pay the agreed-upon rent timely. No-fault just cause evictions, on the other hand, are when the property owner or landlord want to evict a tenant at no fault of the tenant, for example, when the property owner or landlord wants to move into the property. In this article, we are focusing on at-fault just cause evictions.

California At-Fault Just Cause Evictions include the following allowable causes:

- Failure to pay rent.
- Criminal activity occurring on the rental property or use of rental property for illegal purposes. It must be proven that a crime has occurred.
- A serious or repeated breach of a significant provision or material term of the lease agreement. Evidence of the infraction tying the violation to the tenant will be required in court.
- Subletting or subleasing in violation of the signed lease. The landlord must be able to prove in court this has occurred.

LEASE VIOLATIONS SERVED

WHEN RESIDENTS BREAK COMMUNITY RULES OR VIOLATE THEIR LEASE, AND SITE STAFF HAVE EVIDENCE OF THE INFRACTION WHICH CAN TIE THE RESIDENT OR THEIR GUEST TO IT THEY ARE SERVED A LEASE VIOLATION.

SINCE 8/8 SITEWIDE THERE HAVE BEEN 51 LEASE VIOLATIONS SERVED UPON RESIDENTS FOR VARIOUS REASONS.

IF WE SEE A TREND IN LEASE VIOLATIONS, WE WILL SEND OUT A BLASTS TO RESIDENTS REMINDING THEM OF THE TERMS OF THE LEASE OR COMMUNITY RULES. HERE ARE A FEW SAMPLES:

Dear Resident,

We have received concerns of excessive noise in your apartment. Your neighbors were disturbed by loud music and video games after 10pm on multiple occasions this past weekend 9/7 - 9/8.

Security has investigated these complaints and acted when appropriate. We are reminding your neighbor that everyone tries to be considerate of their neighbors, but because they live in an apartment building, noise during the daytime is to be expected and is not a lease violation. However, excessive noise any time, even during the day is a lease violation. Between 10 pm and 7 am, music and other noises that disturb your neighbors are a lease violation.

Please refer to Section F (2) & (12) of the Occupancy Agreement you signed that states: **"Resident agrees to live in a peaceful way respecting the rights of other residents to comfort, safety, privacy, security, and peaceful enjoyment and to refrain from all acts which would interfere with such rights." And "Resident agrees not to create or allow to be created by Resident, members of Resident's household, relatives, guests, invitees or agents, any disruptive, noisy or otherwise offensive use of the Apartment; not to commit any disturbance or nuisance, private or public; not to obstruct free use or access of common areas."**

We expect that you will make every effort to keep all noise at a reasonable level. If you would like to discuss this matter, please call the management office to schedule a time to meet with us.
We thank you for your cooperation.

Dear Resident, |

As you know, The Oaks Apartments are a non-smoking property. Residents are not allowed to smoke in their unit, on their balconies or within 25ft of the buildings. The purpose of this form is to document suspected violations of The Oaks's non-smoking policy. Residents suspected of violating our policy will be given a copy of this form.

The following conditions have been reported to the management office:

- ☒ X Smoke coming into hallway or another tenant unit
☐ Smoking observed in building or on balcony
☐ Smoking observed within 25ft of buildings
☐ Evidence of smoking in unit (smell of smoke, butts, or ashtray)
☐ Other _____

The conditions above were observed on multiple occasions by neighbors and management.

Please consider this notice as a warning that such activity is not acceptable and is a violation of your lease agreement. Further violations could result in the commencement of legal action or your eviction.

Dear Resident, |

It has come to the attention of management that some tenants with dogs have not been diligent in cleaning up after their furry friends. We would like to remind all tenants with pets that it is your responsibility to clean up after your pets. The purpose of this form is to document suspected violations of The Oaks's animal policy. Residents suspected of violating our policy will be given a copy of this form.

According to the lease you signed, you agree: "You are responsible for immediately cleaning up any messes, waste, or soiling caused by your animal in or around dwelling unit."

If you need assistance complying with this request due to a documented disability, you have a right to request a reasonable accommodation and can contact The Community Coordinator Janelle Finklea for support.

We appreciate your cooperation in keeping The Oaks Apartments clean for all residents.

MAINTENANCE HIGHLIGHTS



MAINTENANCE TECHNOLOGY ENHANCEMENT

- We are looking for new opportunities to integrate technological enhancements into our maintenance program. This will include improvements in communication and enhance the level of service we are able to provide.

AUGUST - SEPTEMBER CAPITAL MAINTENANCE PROJECTS THROUGHOUT ALL COMMON SPACES

- Water main refurbishment in buildings 65 & 67
- Flooring replacement in 81 stairwells
- New chairs and tables for 53, 73, 69 building community rooms.
- Main Entry gate repairs
- Sprinkler system repairs at the 53 building
- Water Jetting of freshwater lines in priority building to remove mineral/grease build up
- Boiler maintenance and servicing in 53 building

COMPLETED PERMIT REPAIRS

We continue to work closely with various City departments to close our any code violations and building permits.

A detailed, up to the minute update will be provided during the meeting.

SERVICE REQUESTS COMPLETED IN THE LAST QUARTER

- 493 total work orders were received during the last 3 months.
- 737 total work orders were completed during the last 3 months – effectively clearing the backlog of work order.

CURRENT RESIDENT SERVICE REQUESTS WORK ORDERS OUTSTANDING AS OF 9/16

W/O # 30day	BLD	0 - 7 days	8 - 14 days	15 - 21 days	22 - 28 days	29 + days	Total
	49	3	0	0	0	0	3
	51	2	0	1	0	0	3
	53	19	2	2	2	0	25
	59	6	3	1	0	0	10
	65	4	0	0	0	0	4
	67	4	0	1	1	1	7
	69	6	0	0	0	1	7
	73	4	1	1	1	0	7
	81	4	1	0	0	0	5
Total		50	8	4	6	2	70

MARKETING & COMMUNITY ENGAGEMENT



CITY VOLUNTEERISM

We have 8 staff members signed up to volunteer and help at the 2024 Heart of Oakley festival.

