




Office of the City Manager

ACTION CALENDAR
February 28, 2012

To: Honorable Mayor and Members of the City Council
From:  Christine Daniel, Interim City Manager
Submitted by: William Rogers, Interim Deputy City Manager
Subject: Discussion and Direction Regarding Potential Ballot Measures for the November 6, 2012 General Municipal Election

RECOMMENDATION

Discuss possible ballot measures for November 2012, and provide direction to the City Manager about which issues to include in a community survey.

SUMMARY

As part of the process of developing and approving the FY 2012 & FY 2013 Biennial Budget, the City Council asked staff to develop information regarding the City's unfunded or underfunded infrastructure needs. During the fall of 2011, the City Council held four work sessions on infrastructure to review and examine the City's camp and recreation facilities, pools, roads, watersheds, public buildings and information technology infrastructure (e.g. telephones, computers, data cable and radios). These work sessions revealed a variety of large and small projects, which, if undertaken as a whole today, would total more than \$500 million dollars. More information about specific projects is provided below and in attachments to this report.

The purpose of this report is to discuss what types of projects the Council may wish to consider funding through a revenue measure or measures on the November 2012 ballot and to consider a community survey to provide additional information about the community's interests. The Council's discussion and direction at this meeting will inform the development of such a survey should the Council wish to undertake one.

FISCAL IMPACTS OF RECOMMENDATION

The cost for an initial community survey will be \$24,000 and is included in the General Fund budget for this fiscal year.

CURRENT SITUATION AND ITS EFFECTS

The City of Berkeley is more than 130 years old and its infrastructure is aging. The City's infrastructure includes roads, buildings, parks and open spaces, community centers, storm drains and sewers, and information technology systems. Infrastructure is central to the City's ability to effectively deliver valued community services. As was discussed in the fall, when infrastructure maintenance is deferred the City faces higher repair and replacement costs in future years.

Ballot Measure Development

Following the City Council's fall series of infrastructure work sessions, and in order to prepare for a possible community survey, the City Manager's Office conducted a competitive process to select an opinion research firm to conduct voter surveys. David Mermin, the Berkeley-based partner of Lake Research Associates, was selected and is available to commence the survey process.

At tonight's meeting, Council is being asked to provide direction about which types of projects should be included in a community survey. For example, should potential projects focus on a single area such as streets only, or should the City consider a more omnibus approach that includes areas such as streets, storm drains and some public facilities.

Should the Council choose to move forward, the next steps in the community survey process are as follows:

- The survey would take place in March and 400 Berkeley voters would be surveyed.
- Staff and Lake Research would present community survey results to Council in April.
- Based on those results, Council would be able to discuss whether to narrow the focus of any measures and could direct staff to develop specific measures for the community's consideration. A second survey would then be conducted in May to assess the more focused approach.
- Following a second survey, the Council would decide upon a specific ballot measure or measures, if any, and direct the City Manager to develop ballot measure language for Council consideration in June and July.

Ballot Measure Considerations

As part of this discussion, staff has also provided a comparison of the City's tax rates with other neighboring jurisdictions; the impact on an individual homeowner of various GO Bond amounts; and information about other items likely to be included on the November 2012 ballot.

Tax Rate Comparison: When comparing tax bills between cities, the primary differences relate to taxes based on the General Obligation (GO) Bond debt and the jurisdiction's special taxes, assessments and fees.

GO Bond debt is voter-approved and can be issued by the City or a school district. Special taxes can be used to meet a broad variety of needs, and can be based on different formulas. Berkeley's special taxes are generally based on a tax rate multiplied by the building square footage, while Oakland and Albany's special taxes are usually a flat amount per parcel with some land-use variations. In order to compare these taxes across cities, the comparison is based on a residential home with a \$350,000 assessed value, a \$7,000 homeowner's exemption and 1900 square feet.

Summary of FY 2012 Property-Based Taxes and Assessments Comparison*

AGENCY	Berkeley FY2012		Oakland FY2012		Albany FY2012	
	Rate	Amount	Rate	Amount	Rate	Amount
Countywide Ad Valorem Tax	1.0000%	\$3,430.00	1.0000%	\$3,430.00	1.0000%	\$3,430.00
City of Berkeley GO Bond Debt	.047%	\$161.22				
Voter-Approved Ad Valorem Debt Service Tax (combined rate/tax)	0.2093%	\$717.88	0.4112%	\$1,410.42	0.3888%	\$1,333.58
Total City Special Taxes	\$0.33805	\$642.34		\$395.60		\$322.34
Total City Special Assessments		\$54.22		\$16.60		\$149.38
Total Unified School District Special Taxes	\$0.3296	\$626.26		\$195.00		\$714.00
Total County/Agency Assessments/Fixed Charges		\$233.90		\$237.14		\$221.56
TOTAL CURRENT ANNUAL TAXES		\$5,865.82		\$5,584.76		\$6,170.86
Tax/Assessment Rate		1.676%		1.596%		1.763%

*For the full table, see Attachment 2

Funding Mechanisms: For purposes of this discussion, staff have provided information about tax rates for a new General Obligation Bond issue that could pay for infrastructure projects.

General Obligation (GO) Bonds

A General Obligation (GO) Bond is a form of long term borrowing to finance capital improvements to real property such as public buildings, roads and school facilities. Under a GO bond structure, all tax requirements are shared proportionally based on assessed value.

Key features of a GO Bond are:

- May be used only for capital improvements, not for ongoing operational costs;
- Requires 66.7% voter approval to pass;
- The principal and interest are paid with the proceeds of tax levies made upon taxable property;
- Bonds are repaid by the taxpayers based on their property's assessed value; and
- Bonds are generally repaid over 30 years.

The table below indicates the annual cost to the average homeowner for various GO bond amounts. If the City were to fund projects with a General Obligation bond tax, the annual impact on the average Berkeley homeowner (\$350,000 Assessed Value) would be as follows:

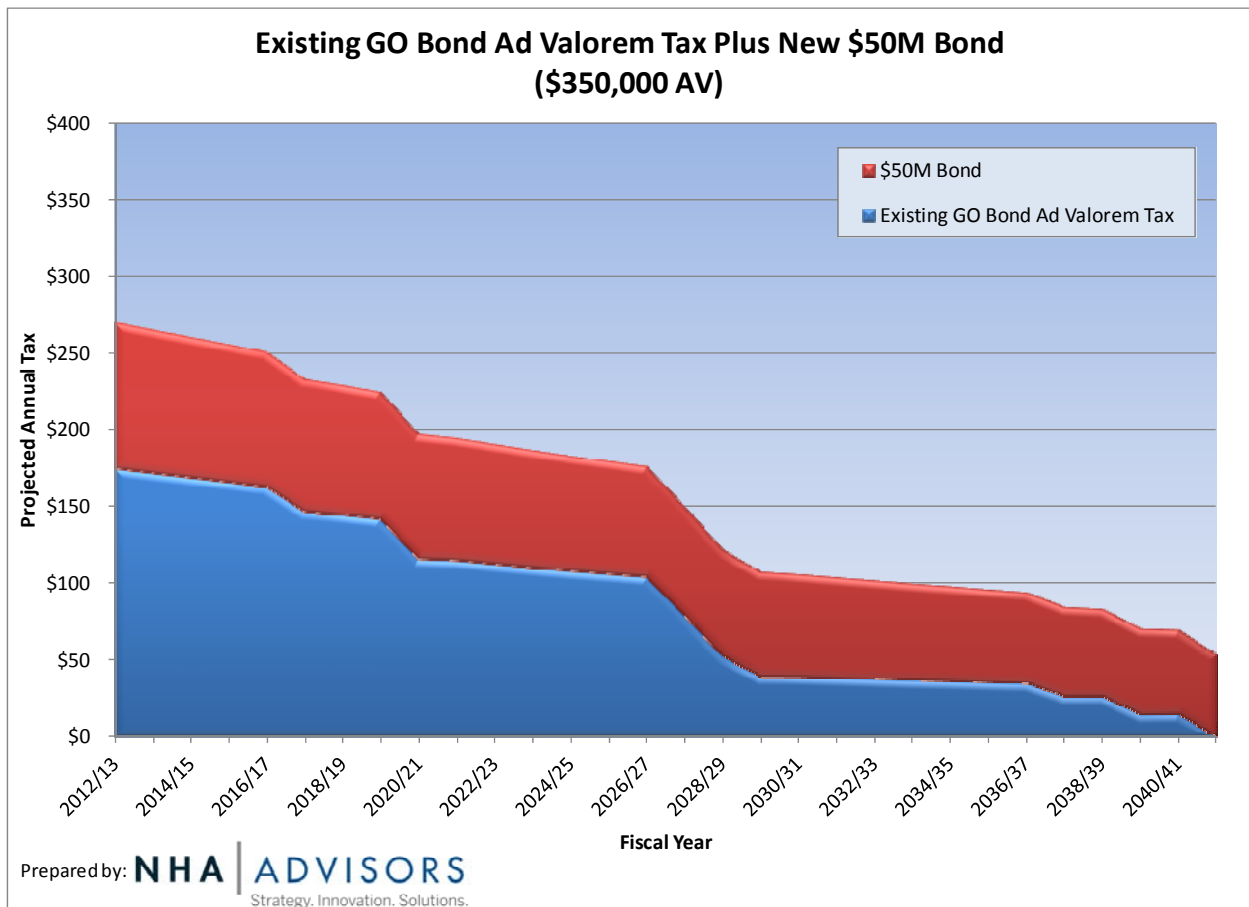
Per \$350,000 Assessed Value	\$25M Bond	\$50M Bond	\$75M Bond	\$100M Bond
Maximum Tax*	47.64	95.27	143.05	190.68

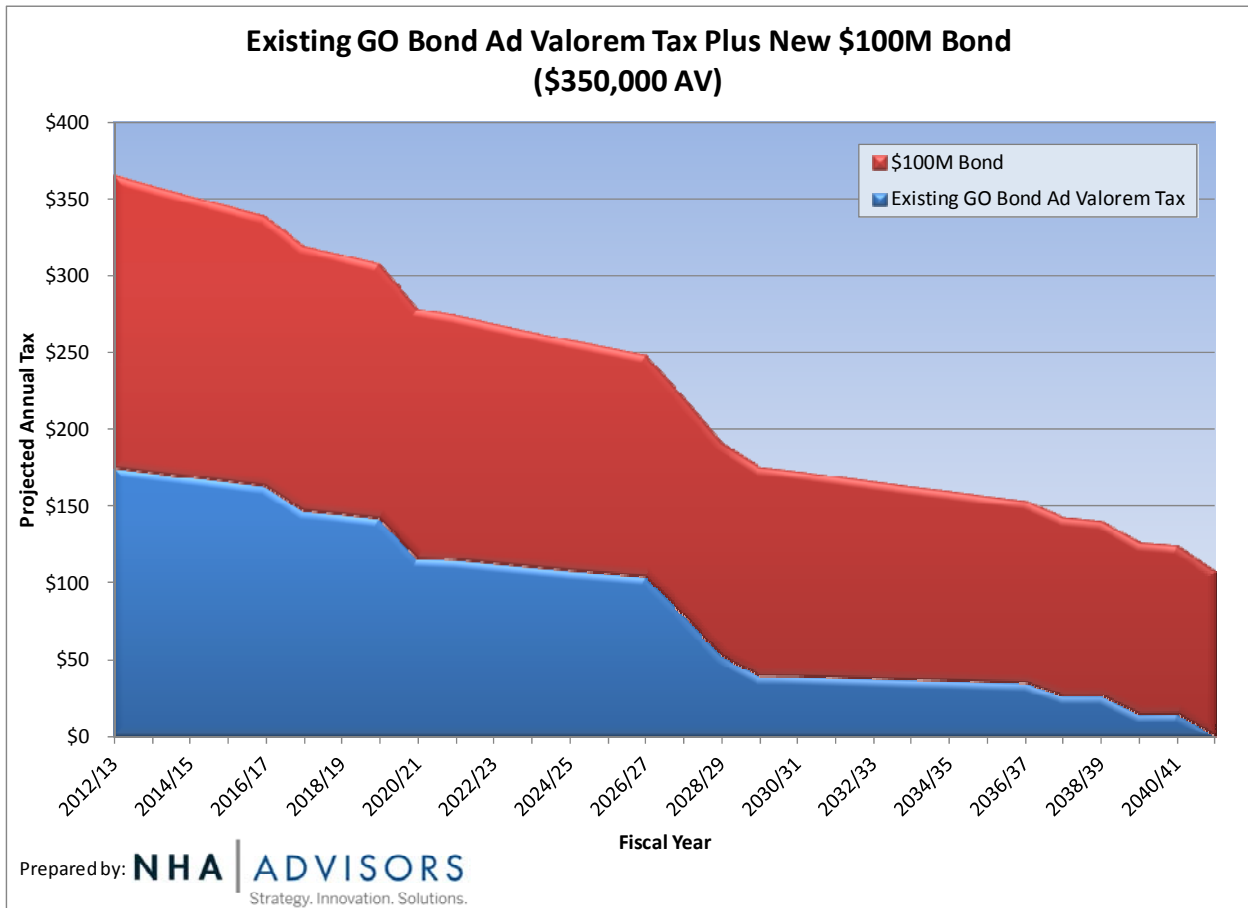
General Obligation Bond calculations are based on a projection of 2% increases in assessed value over a 30-year period of time. The tax required to repay the bond decreases over time. The above table represents the maximum tax and not the average tax over a 30 year period.

Berkeley’s Current GO Bonds and the Tax Impact of New GO Bonds

The City has four existing GO Bonds: Measure G (Fire Seismic), Measure S (Main Library Seismic), Measure I (Animal Shelter) and Measure FF (Neighborhood Libraries). The average homeowner currently pays approximately \$161.00 per year to repay those bonds. Any new bond would initially increase the annual tax amount, however as each of the current bonds expire, the overall tax rate decreases correspondingly.

This is illustrated in the tables below. The blue area reflects the existing GO Bond ad valorem tax for the City of Berkeley. The red area in each table illustrates the increased tax amount if a new bond were to be passed by the voters. The first chart demonstrates the increased tax amount for an average homeowner on a new \$50 million GO Bond; the second chart reflects the increased tax amount on a \$100 million GO Bond.





Capital and City Infrastructure Project Estimates

Below is a summary of the topics discussed during the fall work sessions with estimated dollar amounts for various projects. The total cost to fund all identified unfunded infrastructure projects below is approximately \$523,250,000 at today's costs. It does not capture any additional ongoing operating costs, such as would be required for the operation of a new facility. Funded projects can be found in the Capital Improvement Program (www.CityofBerkeley.info/budget). Additional project details are in Attachment 1.

Project Area	Total Cost	Major Cost Elements or Options
Parks	\$28 M	<ul style="list-style-type: none"> • \$1.95M James Kenney Park • \$1.37M Grove Park • \$5.03M John Hinkel • \$3.21M Rose Garden • \$1.18M Codornices Park • \$1.9M Cesar Chaves Park • \$425,000 Willard Park
Recreation and Community Centers	\$14 M	<ul style="list-style-type: none"> • \$1.5M MLK Jr. Center/YAP • \$2.51M Kames Kenney Community Center • \$5.65M Frances Albrier Community Center • \$325,000 Live Oak Community Center • \$975 Willard Clubhouse
Marina	\$27 M	<ul style="list-style-type: none"> • \$5M Dock Replacements • \$6M Float Replacements • \$2.5M Restroom Replacements • \$1M Paving • \$300,000 Paving (CCP Trails) • \$5M Dredging • \$2.6M Street Paving
Camps	\$9 million	<ul style="list-style-type: none"> • \$650,000 Echo Lake • \$1.2M Cazadero • \$7M Tuolumne
Pools Rehabilitation	\$500,000	\$250,000 for each existing City pool (King and West Campus)
Pool Replacement	\$22.5 million	<ul style="list-style-type: none"> • \$22.5 million in capital (building) costs • \$980,000 in new special tax revenue needed for ongoing operating costs • Needs Mello-Roos for capital and ongoing expenses
Watersheds <i>Three funding structure options</i>	\$207.5 million	<ul style="list-style-type: none"> • Minimum Regulatory Compliance: \$4.35M a year • Limited Green Infrastructure: \$34.5M total • Complete Green Infrastructure: \$9.8M a year
Street Paving	\$87 M	An investment of \$87 million will result in a Pavement Condition Index of 85 with no unfunded needs at the end of 5 years. Other funding choices are available for consideration.
Capital Projects	\$7.3 M	Emergency and Deferred Maintenance
Seismic Retrofit: <i>Major Facilities</i>	\$78 M	<ul style="list-style-type: none"> • Center Street Parking Garage replacement (\$28M) • Veterans Memorial Building Retrofit (\$20M) • Maudelle Shirek Building Retrofit (\$30M)
Seismic Retrofit <i>Smaller Facilities</i>	\$40 M	Multiple service locations across the city, including recreation centers, senior centers, Transfer Station
IT Infrastructure	\$1.8 M	Data Centers
IT Infrastructure	\$650,000	Network Connectivity
TOTAL	\$523,250,000	

The 2012 Ballot Measure Schedule

In order to meet the deadlines set by the Alameda County Registrar of Voters to place items on the November ballot, the following timeline has been developed for the Council's consideration:

Council Meeting Date	Event
Feb. 28: Action Calendar	Council to discuss projects and priorities for survey
March	Conduct survey
April 3: Work Session	Survey results presented
May 1: Action Calendar	Council discussion of second survey
May	Possible second survey
May 29: Work Session	Survey results presented
May 29: Action Calendar	Provide direction on ballot language
June 26: Action Calendar	Review final ballot measure language
July 17: Action Calendar	Final action on ballot measure(s) for Nov. 2012

BACKGROUND

For the past several years, economic pressures such as state take-backs, rising costs, flat revenues and disappearing federal funding have limited the City of Berkeley's ability to invest in its infrastructure. The City has responded by reorganizing services, improving revenue collection from sources such as Business License Taxes, and reducing costs including laying off staff. Between FY 2009 and 2013, the City reduced its workforce by 210 employees, or 12.5 percent.

Through multiple budget cycles, the City Council has adhered to prudent budget policies designed to protect City services and the City's long-term fiscal health. One of the City's central budget principles is to use one-time money for one-time costs. The most significant example of this is Property Transfer Tax revenue which is paid to the City upon sale of a property. The City established a standard for ongoing revenue expectations from the transfer tax and used the amount in excess of that standard for one-time infrastructure projects instead of ongoing services. As a result, in FY07 when the transfer tax plunged from \$17,400,000 to \$8,000,000 in a two year period, the City was able to weather the loss of this revenue by deferring capital projects. However, the deferral of those capital investments means that repair and replacement costs will be higher in the long term.

Workshops: The City Council considered the City's unfunded and underfunded infrastructure needs in a series of workshops held in the fall of 2011. Those dates and reports are as follows:

- September 27: Parks, Pools and Waterfront Capital Needs
- October 25: Watershed Management Plan (Clean Storm Water)
- November 15: Streets Pavement Management System and Capital Needs
- December 13: Public Facilities Capital Needs

November 2012 Ballot: Currently, there is one City of Berkeley non-revenue measure approved for the November 2012 ballot. The County-wide Measure B sales tax reauthorization may also appear on the ballot. A number of state propositions have

qualified for the ballot and a high number have been cleared for circulation as voter initiatives. See Attachment 4 for details. The Council may wish to consider the number of measures appearing on the ballot all together when considering placing local measures on the ballot.

RATIONALE FOR RECOMMENDATION

One tool in the process of considering placement of local measures on the ballot is to conduct a community survey to evaluate the public's interest in funding various projects and programs.

ALTERNATIVE ACTIONS CONSIDERED

Continue discussions of infrastructure funding needs, but do not conduct a survey at this time.

CONTACT PERSON

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Attachments:

- 1: Infrastructure Needs Summaries From Fall Workshops
- 2: Residential Property Tax Bill Comparison
- 3: November 2012 Election Timeline
- 4: Statewide Ballot Measure

	\$5,025,000	<p>John Hinkel Park</p> <ul style="list-style-type: none"> * Renovate or replace Clubhouse * Renovate historic amphitheater & parking lot, ADA access * Replace/renovate hazardous play area * Refurbish historic fireplace * Renovate pathways, ADA access * New accessible unisex restroom (by amphitheater)
	\$3,210,000	<p>Berkeley Rose Garden</p> <ul style="list-style-type: none"> * Restore historic trellis * Repair & resurface pathways * Renovate irrigation system (Bay-Friendly) * Pond/creek restoration * Restore perimeter planting * Renovate rose planting beds (as needed) * Renovate/replace retaining walls, fences * Resurface tennis courts
	\$1,180,000	<p>Codornices Park</p> <ul style="list-style-type: none"> * Stabilize hillside and safety improvements to slide * Resurface basketball court * Ballfield renovation, backstop, & drainage improvements * Trail & pathway repairs & improvements * Renovate turf areas * Erosion control * Renovate picnic areas (2) * Lighting including tunnel to Rose Garden * Railings, steps, site furnishings
	\$1,885,000	<p>Cesar Chavez Park</p> <ul style="list-style-type: none"> * Pathway resurfacing, ADA upgrades * Irrigation improvements (Bay Friendly) * Site furnishings & signage * Bay Trail link to University Avenue/Bay Trail Extension
	\$425,000	<p>Willard Park</p> <ul style="list-style-type: none"> * Renovate play area * Resurface tennis courts * Resurface at practice wall * Turf and irrigation renovation (Bay-Friendly) * Pathway and access improvements

<p>Community Centers \$14 million total</p>	<p>\$1,495,000</p> <p>\$2,510,000</p> <p>\$5,645,000</p> <p>\$325,000</p> <p>\$975,000</p>	<p>MLK Jr. Center/YAP</p> <ul style="list-style-type: none"> * Remodel interior program space (expand programs) * New fire alarm system * Replace ventilation system * Replace HVAC system * Replace roof, eaves, gutter <p>James Kenney Community Center</p> <ul style="list-style-type: none"> * Renovate interior bathrooms, ADA * Renovate inclusion program facilities * Renovate kiln room (ventilation) * Replace HVAC system * New weight room equipment <p>Frances Albrier Community Center</p> <ul style="list-style-type: none"> * Expand gym and game room * Replace gas line * HVAC replacement * Renovate & upgrade kiln room * New fire alarm system * Remodel front office/entrance/reception area * Remodel kitchen <p>Live Oak Community Center</p> <ul style="list-style-type: none"> * Renovate & heat bathrooms * Repair lighting * Replace all doors * Replace gutters, downspouts north side * Replace mirrors * ADA bathrooms for theater * Remodel kitchen * ADA upgrades <p>Willard Clubhouse</p> <ul style="list-style-type: none"> * Building renovation * Building expansion * Remodel restroom * Repair roof
<p>Marina</p>	<p>\$27 million</p>	<ul style="list-style-type: none"> • \$5M Dock Replacements • \$6M Float Replacements • \$2.5M Restroom Replacements • \$1M Paving • \$300,000 Paving (CCP Trails) • \$5M Dredging • \$2.6M Street Paving

Camps: Tuolumne, Echo Lake and Cazadero Music Camp.	9 million	Breakdown by Location <ul style="list-style-type: none"> • \$650,000 Echo Lake Camp: Parking and pathway renovation and ADA improvements. • \$1.2M Cazadero Camp: Path and ADA improvements; forest management • \$7M Tuolumne Camp: Universal access to all main facilities; modernize water and septic systems; forest and watershed management; cabin replacement
Pool Improvements (King and West Campus)	0.5 million (\$250,000 each)	King Pool <ul style="list-style-type: none"> • Replacement of existing piping and concrete decking • Locker room and disability access upgrades • Heater replacement West Campus <ul style="list-style-type: none"> • Piping and concrete decking replacement • Locker room and disability access upgrades
2010 Pools Bond Proposal	\$22.5 million	\$22.5 million for Capital Improvements; does not include approximately \$1 million a year for ongoing operational costs.

Watershed Management Plan
Presented October 25

The Watershed Management Plan (WMP) takes a comprehensive and holistic approach to establishing a healthier balance between the urban environment and natural ecosystems. Toward this end, the WMP includes recommendations for enhancing and improving City efforts to meet specific goals including: water quality protection; urban flooding reduction; natural waterways and habitat preservation and restoration; and promotion of the re-use of rainwater as a resource. The total estimated cost for Citywide improvements of all watersheds is as follows.

Project	Cost	Notes
All Watersheds	\$207.5M total	<ul style="list-style-type: none"> • Potter \$68M • Codornices \$18M • Strawberry \$45M • Schoolhouse \$19.5M • Gilman \$10M • Cerrito \$15M • Marin \$15M • Temescal \$8.5M • Wildcat \$8.5M

However, included in the plan are proposed funding scenarios that correspond to Watershed Management Plan implementation levels. These funding options correspond to program levels that can be implemented with each funding level range. The plan includes a program plan for existing revenues; below are the plans that could be attained with additional revenue.

Plan 1: Minimum Regulatory Compliance	\$4.35M/year	<ul style="list-style-type: none"> • CSF (\$1.9M) + Special Tax (\$2.25M) + LRDP (\$200K) • Average Single Family Residence \$104/yr
Plan 2: Limited Green Infrastructure	\$34.8M	<ul style="list-style-type: none"> • CSF (\$1.9M) + Special Tax (\$2.7M) + Bond (\$30M) + LRDP (\$200K) • Average Single Family Residence: \$174/yr
Plan 3: Complete Green Infrastructure	\$9.8M/year	<ul style="list-style-type: none"> • CSF (\$1.9M) + Special Tax (\$7.7M) + LRDP (\$200K) • Average Single Family Residence \$238/yr

CSF: Clean Water Sewer Fund
 LRDP: Long Range Development Plan

Street Pavement Management System

From the City Auditor’s Report, “Failing Streets: Time to Change Direction to Achieve Sustainability,” presented to the Council on November 15

The average Berkeley street is in an “at risk” condition, meaning it has deteriorated to the point where resurfacing or reconstruction is needed because preventive maintenance work, such as crack and slurry sealing, is no longer effective. An Audit was conducted to determine what it would take financially to raise the average street condition to the mid-range of “good,” which is a regional goal for the nine-county San Francisco Bay Area.

At “good,” Berkeley’s streets can be sealed for about \$36,000 per mile. Streets that have deteriorated to “fair” or “poor” condition require resurfacing, at an average cost of \$126,000 to \$309,000 per mile, or **3.5 to 8.6 times the cost of preventive maintenance**. Streets in “failed” condition require reconstruction, which Berkeley contracts out. The average cost of \$1.15 million per mile is **almost 32 times the cost of timely maintenance**. About 134 (62 percent) of Berkeley’s 216 linear miles of streets need to be resurfaced or reconstructed at an estimated cost of \$54 million. Collector streets are in the worst condition, with 68 percent in substandard or failed condition.

The table below summarizes the results at the end of five years for each scenario, showing total expenditures, average PCI, and the remaining unfunded need.

Summary of Results of Funding and Rehabilitation Scenarios			
Scenario and Base Budget	Total 5-Year Expenditures	Average PCI at End of 5 Years	Unfunded Need* at End of 5 Years
Scenario 1: \$3.66M base budget <i>(current funding level)</i>	\$18,298,982	63	\$70,767,524
Scenario 2: \$46M base budget <i>(front-loaded budget)</i>	\$87,310,557	85	\$0
Scenario 3: \$7.5M base budget	\$38,400,194	63	\$45,594,008
Scenario 4: \$10M base budget	\$51,200,296	68	\$32,231,418
Scenario 5: \$12.5M base budget	\$64,000,421	73	\$19,405,372
Scenario 6: \$15M base budget	\$76,800,003	79	\$7,072,403
Scenario 7: \$17.5M base budget	\$84,164,570	82	\$0
Total			
<p><i>**“Unfunded need” means the City has reached the optimal overall PCI of 80 and there are no streets in failed condition.</i></p> <p><i>Source: Funding and rehabilitation scenarios created by PW and audit staff in StreetSaver®</i></p>			

Public Facilities
Presented December 13

Public Facilities: Deferred maintenance of aging City facilities continues to be a critical need. Within the available annual budget, projects are prioritized and selected each fiscal year, with safety being a priority. The City also allocates a portion of its annual budget for Americans with Disabilities Act (ADA) improvements to our facilities.

Similar to other types of infrastructure, the longer maintenance is deferred the higher the replacement costs in the future.

Project	Cost	Notes
Emergency & Deferred Maintenance Capital Projects	\$7.3M	<ul style="list-style-type: none"> • ADA compliance upgrades • Building systems: roofing, foundation, electrical, plumbing, HVAC, Painting, Elevators • Energy Efficiency: Windows, Lighting, Insulation, HVAC
Seismic Retrofit: Major Facilities	\$78M	<ul style="list-style-type: none"> • Center St Parking Garage replacement (\$28M) • Veterans Memorial Building Retrofit (\$20M) • Old City Hall Retrofit (\$30M)
Seismic Retrofit: Other City Facilities	\$15 – 40M	About 20 smaller facilities, including senior centers and recreation centers

Information Technology:

The City provides Information Technology (IT) services in 43 locations, including senior centers, fire stations, parks and recreation sites, health clinics and libraries. These locations are connected to each other and the public through phones, network cable, switches, routers and wireless access points, all of which need to be maintained, and in many cases, expanded to ensure Berkeley services are delivered efficiently and effectively. In fiscal year 2011, there were 117 telephone system crashes attributable to system age. This represents approximately 702 hours of telephone outages at one or more City locations, including the Public Health Clinic and the Public Works Corporation Yard. This is a significant impact on City residents.

As more City services are delivered electronically, or at least depend on technology to be effective, investments in information technology will establish a solid foundation for current and future service delivery.

Project	Cost	Notes
IT Infrastructure: Data Centers (Public Safety Bldg, City Hall)	\$1.8M	Data centers maintain records, emails, contracts, customer business, birth certificates health records, (?),
IT Infrastructure: Network Connectivity (Data & Voice)	\$650K	<ul style="list-style-type: none"> • Replace old system with VoIP • Network Cabling and Equipment for 43 separate locations

Attachment 2

FY 2012 Comparison of Berkeley, Oakland, and Albany Property-Based Taxes and Assessments

Ad Valorem Taxes: Berkeley, Oakland, and Albany properties are all equally subject to the 1% countywide ad valorem tax based on assessed value, as well as the ad valorem debt service imposed by the Peralta Community College district, Bay Area Rapid Transit district, East Bay Regional Park district and East Bay Municipal Utility district (EBMUD). In FY 2012 these taxes represent \$3,640.94 of the total ad valorem tax for each city.

Berkeley, Oakland, and Albany have each approved City GO bond debt, which is based upon the assessed value. In FY 2012, Berkeley's cumulative GO bond tax at \$161.22 is significantly lower than Oakland's cumulative GO bond tax at \$751.86 and Albany's GO bond tax at \$558.40.

Special Taxes: Each of these cities also has its own set of voter-approved special taxes and other assessments, however they do not use the same taxation method as the City of Berkeley. For instance, while most of Berkeley's special taxes are based on a tax rate multiplied by the building square footage, those in Oakland and Albany are usually a standard flat rate amount per parcel with some variation in the flat rate based upon land use. In all three cities, most of the voter approved special taxes allow for an annual cost of living adjustment based either on the annual Bay Area Consumer Price Index (CIP) (although Berkeley's Emergency Services for the Severely Disabled tax and the Library Tax uses the higher of the Bay Area CIP or the Statewide Personal Income Growth (PIG) rate).

There are several significant differences in the special taxes imposed by Berkeley, Oakland, and Albany. For example, Berkeley's Library Tax at \$314.46 is significantly higher than Oakland's library tax at \$86.86¹ or Albany's library and library supplemental tax at \$92.60.

Another significant difference is in school taxes. Each city has approved School GO bond debt and special school taxes. Berkeley's combined GO and special school taxes total \$1,133.22, Albany's GO and special school tax is now slightly higher than Berkeley's \$1,278.24 (in 2008 it was slightly lower), but Oakland's is significantly lower at \$642.62.

County and other agency special taxes and assessments (such as CSA: County Service Area Vector Control, AC Transit, East Bay Municipal Utility District and East Bay Regional Parks) are parcel-based, flat rate taxes based on land use. And, with some limited exceptions², apply equally to all property in these three cities. There are a few other variations billed on property tax statements.

The following table summarizes the comparison of total FY 2012 annual parcel based taxes for Berkeley, Oakland, and Albany using the same property with an assessed value of \$350,000 and a homeowner's exemption of \$7,000.

NOTE: While the total GO bond rates for Oakland and Albany are provided in the table below, the rates for each of the individual bonds was not immediately available from those cities.

¹ Parcels located in the Rockridge Community Facility District (CFD) 1 pay an additional tax of \$25 annually.

² Albany is not subject to the additional Mosquito Abatement fee and is not included in the CSA Lead Abatement program. Oakland properties pay higher CSA Vector Control assessments than Berkeley or Albany.

AGENCY	Berkeley FY2012		Oakland FY2012		Albany FY2012	
	Rate	Amount	Rate	Amount	Rate	Amount
COUNTYWIDE AD VALOREM TAX	1.0000%	\$3,235.00	1.0000%	\$3,235.00	1.0000%	\$3,235.00
<u>Voter-Approved Ad Valorem Debt Service Tax (combined rate/tax)</u>	0.2563%	\$829.14	0.4112%	\$1,330.24	0.3888%	\$1,257.78
City GO Bond Measure G (Fire Seismic)	0.0130%	42.06				
City GO Bond Measure S (Main Lib Seismic)	0.0200%	64.70				
City GO Bond Measure I (Animal Shelter)	0.0020%	6.48				
City GO Bond Measure FF (Neighborhood Lib)	0.0120%	38.82				
Unified School District GO Bonds	0.1478%	478.12	0.1305%	422.16	0.1645%	532.16
Peralta Community College	0.0436%	141.06	0.0436%	141.06	0.0436%	141.06
Bay Area Rapid Transit	0.0041%	13.26	0.0041%	13.26	0.0041%	13.26
East Bay Regional Park	0.0071%	22.98	0.0071%	22.98	0.0071%	22.98
EBMUD Special District 1	0.0067%	21.66	0.0067%	21.66	0.0067%	21.66
Oakland GO's			0.2192%	709.12		
Seismic			0.0xxx%			
Measure DD 2003A			0.0xxx%			
GO Refunding Series			0.0xxx%			
Pension Obligation Bonds			0.0xxx%			
Albany GO's					0.1628%	526.66
Pension Obligation Bonds					0.xxxx%	0
Measure F Series 2003 & 2007					0.xxxx%	0
TOTAL ALL AD VALOREM TAXES	1.2563%	\$4,064.14	1.4112	\$4,565.24	1.3888%	\$4,492.78
<u>City Voter-Approved Special Taxes</u>	Rate X BSF					
Landscape/Park						
Oak: LLAD; Alb: City Landscape 88-1	\$0.1169	222.12	parcel/unit	102.64	parcel/unit	75.54
Alb: City Landscape 96-1					parcel/unit	69.00
Library Tax	\$0.1655	314.46	parcel/unit	86.86	parcel/unit	92.60
Paramedic Supplemental						
Oak: Emg Med; Alb: ALS (Meas N)	\$0.0312	59.28	parcel/unit	22.10	parcel/unit	85.20
Physically Disabled	\$0.01195	22.72				
CFD1 Disaster Fire/Mello Roos						
Oak: Violence Prevention (BB) &	\$0.01250	23.76	parcel/unit	184.00		
Total City Special Taxes	\$0.33805	\$642.34		\$395.60		\$322.34
<u>City Assessments</u>						
Street Lighting	0.0108	20.52				
Clean Storm Water						
Oak: Flood 12; Alb: st/storm drains & CSW	Formula	33.70	parcel/unit	16.60	parcel/unit	149.38
Total City Special Assessments		\$54.22		\$16.60		\$149.38
BUSD Special Taxes						
Facility Maintenance Measure BB	\$0.0631	119.90				
Educational Excellence Measure A (2006)						
Oak: Meas G; Alb Meas I & J	\$0.2665	506.36	parcel/unit	\$195.00	parcel/unit	\$714.00
Total Unified School District Special Taxes	\$0.3296	\$626.26		\$195.00		\$714.00
<u>County/Agency Assessments/Fixed Charges</u>						
CSA Paramedic	Parcel-based	26.86		26.86		26.86
Mosquito Abatement	Parcel-based	1.74		1.74	N/A	0.00
Mosquito Assess 2	Parcel-based	2.50		2.52		
CSA Vector Control	Parcel-based	5.92		7.20		5.92
CSA Vector Control B	Parcel-based	4.08		4.12		4.08
CSA Lead Abatement	Parcel-based	10.00		10.00	N/A	0.00
AC Transit (Measure VV)	Parcel-based	96.00		96.00		96.00
EBMUD Wet weather	Parcel-based	71.26		71.26		71.26
East Bay Trail LLD	Parcel-based	5.44		5.44		5.44
EBRP Park Safety/M	Parcel-based	12.00		12.00		12.00
Total County Assessments/Charges		\$233.90		\$237.14		\$221.56
TOTAL CURRENT ANNUAL TAXES		\$5,620.86		\$5,409.58		\$5,900.06
Tax/Assessment Rate		1.72%		1.66%		1.82%

**CITY OF BERKELEY
GENERAL ELECTION CALENDAR
November 6, 2012**

<u>DAYS PRIOR TO ELECTION</u>	<u>DATE</u>	<u>ACTION TAKEN</u>
180	May 10, 2012	Suggested Last Day to file petitions for initiative or charter amendment ballot measure. Petitions received after this date will be accepted, but may not be on the November ballot.
158 103	June 1, 2012 July 26, 2012	Signature In-Lieu of Filing Fee Period - Candidates may collect signatures to offset the \$150 filing fee. Charter Art. III, Sec. 6.5
113 88	July 16, 2012 August 10, 2012	FILING PERIOD - CANDIDATE NOMINATION PAPERS EC 10220 et seq., Charter Art. III, Sec. 6.5
88	August 10, 2012	Deadline to deliver resolution calling ballot measure election to Registrar and request election consolidation and services . For bonds, Tax Rate Statement also due. EC 12001, 10002, 1405, 9241; EC 9400-9401
87 83	August 11, 2012 August 15, 2012	Extended candidate filing period. Filing is extended if an incumbent eligible for re-election does not file for re-election prior to 5:00 p.m. on August 10th. Incumbents are not eligible to file during the extended period. EC 10225
81	August 17, 2012	Last day to file primary arguments. EC 9280-9287
75	August 23, 2012	Last day to file rebuttal arguments. Impartial Analysis due. EC 9280-9287
74 64	August 24, 2012 September 3, 2012	Public review period for ballot arguments and Impartial Analysis. EC 9295
57 14	September 10, 2012 October 23, 2012	Filing Period for Write in Candidates. EC 8601
40 21	September 27, 2012 October 16, 2012	Voter Information & Sample Ballot Pamphlet mailing period. EC §13303-04, 13306
29 7	October 8, 2012 October 30, 2012	Vote-by-Mail Ballots may be obtained between these dates. After October 30th VBM ballots may be obtained at the Registrar's office. EC §3001
32	October 5, 2012	First Pre-Election Campaign Statement due. GC §84200.7
15	October 22, 2012	Last Day to Register to Vote. EC §§2102, 2107
12	October 25, 2012	Second Pre-Election Campaign Statement due. GC §84200.7

<u>DAYS PRIOR TO ELECTION</u>	<u>DATE</u>	<u>ACTION TAKEN</u>
7	October 30, 2012	City Clerk to publish list of campaign contributions of \$50 or more. BMC 2.12.065
Election Day	November 6, 2012	Election Day EC §1000
28	December 4, 2012	Last day for County to certify election results to city. EC §15372
35	December 11, 2012	Council to adopt and certify election results. EC §9217, 10262-10263; Charter Art. III, Sec. 10
	January 31, 2013	Semi-Annual Campaign Statement due. GC 84200

Updated 12.13.11

Attachment 4

November 2012 Ballot Information

In addition to the national, state and local candidates on the November 2012 ballot, there will also be a number of state propositions and initiatives. The "Cleared For Circulation" list has been abridged to account for multiple submissions of measures with the same title. The full list can be found at <http://www.sos.ca.gov/elections/>.

Ballot Measure
State of California: Qualified for Ballot
Safe, Clean, and Reliable Drinking Water Supply Act of 2012
Prohibits Political Contributions by Payroll Deduction. Prohibitions on Contributions to Candidates.
Changes Law to Allow Auto Insurance Companies to Set Prices Based on a Driver's History of Insurance Coverage.
State of California: Cleared for Circulation
Political Contributions and Expenditures by Corporations. Shareholder Approval.
Government Spending Limits.
Part-Time Legislature. Two-Year State Budget.
Tax to Benefit Public Schools, Social Services, Public Safety, and Road Maintenance.
Undocumented Immigrants. State Income Taxes.
Undocumented Immigrants. Requires State Law Enforcement Officers to Enforce Federal Immigration Law. Denies Driver's Licenses to Undocumented Immigrants.
Education. Repeals Non-Discrimination Requirements for School Instruction.
Requires Assessment of Most Commercial Property Every Three Years. Provides Tax Reduction for Homeowners, Renters, and Businesses. Initiative Constitutional Amendment and Statute.
Tax to Pay Tuition and Fees at California Public Universities. Initiative Constitutional Amendment and Statute.
Elimination of California High Speed Rail Authority.
Limits on Hospital Charges.
Nonprofit Hospitals. Required Minimum Charity Care.
Voting Requirement. Polluter Fees.
Temporary Taxes to Fund Education. Guaranteed Local Public Safety Funding.
Education. Repeals Non-Discrimination Requirements for School Instruction.
Education. Permits Parents to Excuse Children from Instruction in Social Sciences and Family Life.
Tax Treatment for Multistate Businesses. Clean Energy and Energy Efficiency Funding.
Prohibits Abortions for Females Under 18 Without Parental Notification and Waiting Period.
Reduces Pension Benefits for Public Employees.
Genetically Engineered Foods. Mandatory Labeling.

Approval of Healthcare Insurance Rate Changes.
Legislature Expansion. Legislative Process.
Online K-12 Education. College Preparatory Courses.
State Funding to Local Governments. Criminal Justice. Social Services.
State Budget. State and Local Government.
Equal Male/Female Membership of Legislature.
Elimination of Benefits for Part-Time Local Officials.
Health Insurance.
Human Trafficking. Penalties. Sex Offender Registration.
Regulation of Corporations.
Three Strikes Law. Sentencing for Repeat Felony Offenders.
Reinstates Right of Same-Sex Couples to Marry.
Concealed Firearms.
State Bank. Tax on California Oil and Gas.
Marijuana Legalization.
Tax on Controlled Substances.
Tax on California Oil and Natural Gas. Revenues to Education.
Elimination of Environmental Protection Laws and Agencies.
Nuclear Power.
Constitutional Definition of a Person.
Reduced Marijuana Penalties.
Tax on California Oil and Natural Gas. Revenues to Education.
Death Penalty Repeal.
State and Local Government Officials. Personal Liability.
Gifts to State and Local Government Officials. Disqualification.
State and Local Legislation and Policies.
State and Local Government Purchasing. Made in United States.
Reduces Pension Benefits for Public Employees. Creates a New State Retirement System for Private Sector Employees.
Increases Retirement Age for Teachers, Peace Officers, and Other Public Employees.
Increases Income Taxes on Teachers, Nurses, Police Officers, Firefighters, and Other Public Employees for Pension Income.
Eliminates Collective Bargaining Rights for Teachers, Nurses, Police Officers, Firefighters, and Other Public Employees.