

# CITY OF OAKLAND

## BUDGET ADVISORY COMMISSION

Notice is hereby given that a meeting of the City of Oakland Budget Advisory Commission (BAC) is scheduled for **Wednesday, January 8, 2025, at 6:00 PM.**

The Budget Advisory Commission will be held in Hearing Room 2 in City Hall.

Members of the Public have the following options to observe the meeting:

1. Watch the meeting on KTOP using Granicus.
2. Use the Zoom link attached to this agenda to remotely observe the meeting.

### **Commission Members:**

Mandela Bliss, Armand Bryan, Larisa Casillas, Mike Forbes, Guadalupe Garcia, Margaret Grimsley, Mike Petouhoff, Jane Yang, Stephisha Ycoy-Walton

### **City's Representative(s):**

Nathan Bassett – *Finance Department*

### **Meeting Agenda:**

1. Administrative Matters [5 minutes]
  - Welcome & Attendance
2. Approval of Prior Meeting Minutes [2 minutes]
  - Moved to Next Meeting – Meetings of April 10, 2024; May 23, 2024; June 6, 2024; July 10, 2024; September 11, 2024; November 13, 2024, and December 11, 2024
3. Planning & Building Department Presentation on the City's General Plan Element [30 minutes]
4. Commissioners' protocol [5 minutes]
  - Commissioner Application review
  - Onboarding & Exit / Recruitment – Open spots
5. Finance Department Update [15 minutes]
  - December Council Actions
  - Current Year Budget Balancing Update
6. Public Survey Outreach [10 minutes]
  - Final Budget Survey links to share out:
    - i. [Oakland FY 2025-27 Biennial Budget Survey \(English\)](#)
    - ii. [Oakland FY 2025-27 Biennial Budget Survey \(Spanish\)](#)
    - iii. Chinese translation in progress
  - Commissioner commitments for survey outreach
    - i. 5 minutes for personal brainstorming; give list to Chair

**CITY OF OAKLAND  
BUDGET ADVISORY COMMISSION**

7. 2025-2026 Calendar Year Strategy [20 min]
  - FYI: Briefing Book for City Council
  - Working Time: Ad Hoc committee small-group breakouts
8. Action Commitments: Self-Reported Budget Advisory Commission Time prior to February 12, 2025 Meeting [15 Min]
  - Commissioner Bryan
  - Commissioner Bliss
  - Commissioner Casillas
  - Commissioner Forbes
  - Commissioner Garcia
  - Commissioner Grimsley
  - Commissioner Petouhoff
  - Commissioner Yang
  - Commissioner Ycoy-Walton
9. Agenda Items for Future Meetings [5 minutes]
10. Open Forum [10 minutes]
11. Adjournment

Attachments: General Plan Update (GPU) Phase 2 Overview; Budget Advisory Commission 2025 Strategy; Oakland City Council Budget Briefing Book

**CITY OF OAKLAND  
BUDGET ADVISORY COMMISSION**

Hi there,

You are invited to a Zoom webinar.

When: November 13, 2024 06:00 PM Pacific Time (US and Canada)

Topic: Meeting of the City of Oakland Budget Advisory Commission (BAC)

Please click the link below to join the webinar:

<https://us06web.zoom.us/j/81584763954>

Or One tap mobile :

+16694449171,,81584763954# US

+16699006833,,81584763954# US (San Jose)

Or Telephone:

Dial(for higher quality, dial a number based on your current location):

+1 669 444 9171 US

+1 669 900 6833 US (San Jose)

+1 346 248 7799 US (Houston)

+1 719 359 4580 US

+1 253 205 0468 US

+1 253 215 8782 US (Tacoma)

+1 929 205 6099 US (New York)

+1 301 715 8592 US (Washington DC)

+1 305 224 1968 US

+1 309 205 3325 US

+1 312 626 6799 US (Chicago)

+1 360 209 5623 US

+1 386 347 5053 US

+1 507 473 4847 US

+1 564 217 2000 US

+1 646 931 3860 US

+1 689 278 1000 US

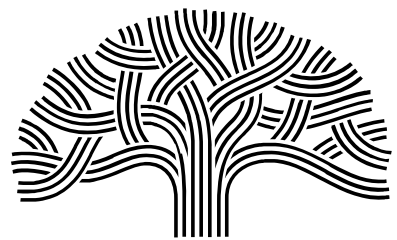
Webinar ID: 815 8476 3954

International numbers available: <https://us06web.zoom.us/j/kc4erTBb6i>

# General Plan Update (GPU) Phase 2 Overview

**Presentation to the Budget  
Advisory Commission**  
**January 8, 2025**

**Planning and Building Department**  
**Joanna Winter, Lakshmi Rajagopalan**



**CITY OF  
OAKLAND**



# Agenda

- General Plan Update (GPU) Background
- GPU Phase 2 Components
- Discussion
- Next Steps

# General Plan Background

# City of Oakland Team

- **Joanna Winter**, Planner IV, Phase 2 Project Manager
- Laura Kaminski, Strategic Planning Manager
- Tarisha Bal, Deputy City Attorney
- Lakshmi Rajagopalan and Michelle Matranga, Co-Leads, Land Use and Transportation Element (LUTE)
- Ruslan Filipau, Lead, Noise Element
- Daniel Findley, Lead, Infrastructure & Capital Facilities (ICF) Element
- Khalilha Haynes, Lead, Open Space, Conservation, and Recreation (OSCAR) Element
- Timothy Green, General Plan Advisory Committee Coordinator
- Bebe LeGardeur, Elements Support
- Mariah Padilla, Elements Support
- Aaron Lehmer, Technical Communications Specialist

# What is a General Plan?



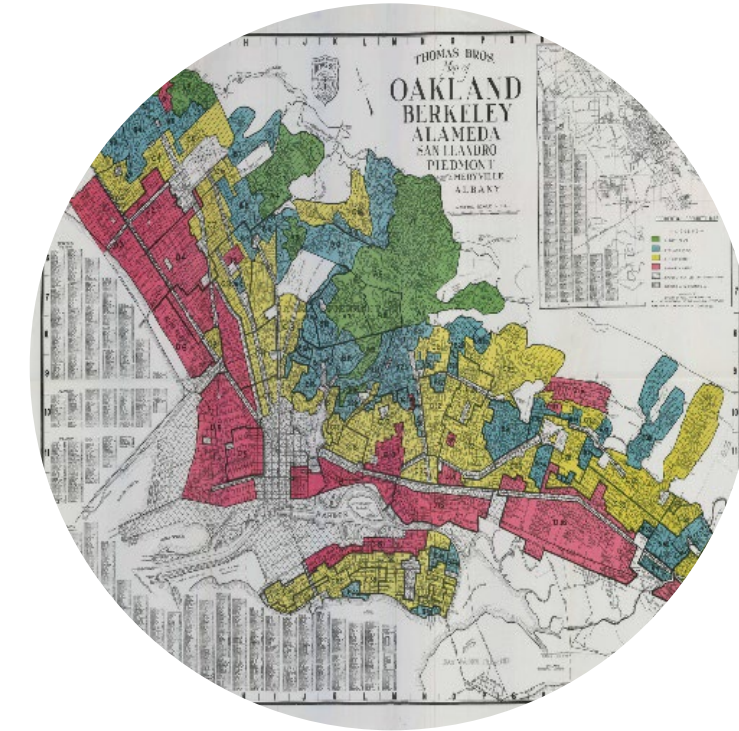
## "Constitution" for development and conservation

Establishes citywide vision  
and supporting goals,  
policies, and  
implementation measures



## Identifies past challenges & accomplishments

Provides consistent  
direction for future  
development



## Opportunity to Reduce Racial Inequities & Do Inclusive Engagement

Engage our community in  
the planning and decision-  
making process



# How does the General Plan Affect Oakland?



Enhance parks and recreational spaces



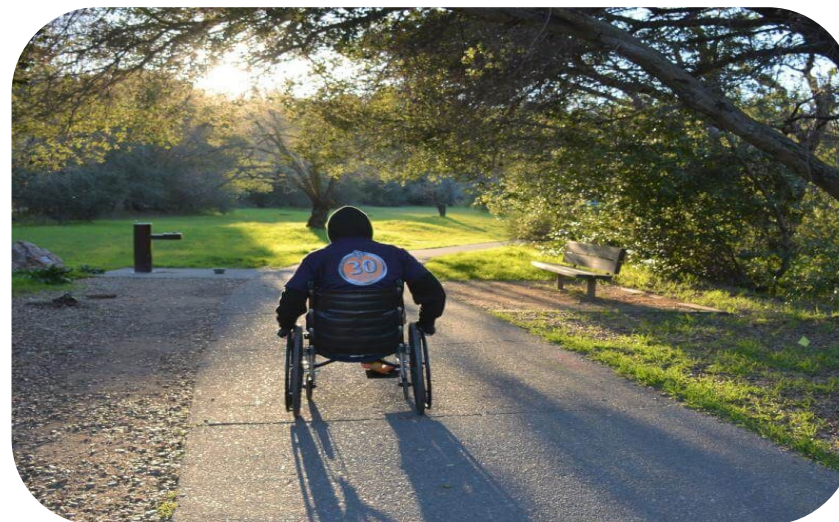
Improve access to jobs and career opportunities



Create more livable neighborhoods



Nurture cultural and natural resources



Improve how people get around



Improve city infrastructure

# Phased Update

PHASE 1:  
2020-2023



PHASE 2:  
2023-2026



# Overview of Phase 1 Elements



## Housing

- Addresses Oaklander's **housing needs, at all income levels** (2023-2031)
- **Protect** Tenants
- **Preserve** Existing Affordable Housing
- **Produce** Affordable Housing



## Safety

- Address **natural and human-caused hazards** (wildfire, earthquake, climate change, flooding, evacuation, hazardous materials)
- Improve **resilience to climate change** impacts

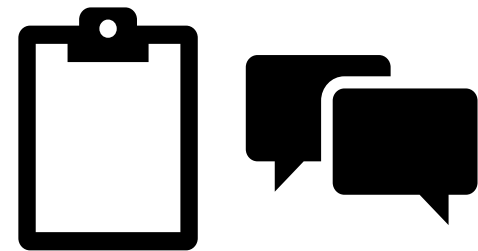


## Environmental Justice

- Address needs of **most impacted and vulnerable communities**
- Address air quality and pollution; safe and sanitary housing; healthy food access; physical activity; investment prioritization; civic engagement

# Phase 2 Timeline

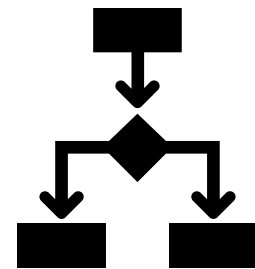
FALL 2024



**Initial Engagement**

*Build on Phase 1 input and get thoughts on Phase 2 issues and strategies*

WINTER 2024 –  
SPRING 2025



**Develop Alternatives**

*Evaluate different options, concepts, and tradeoffs to achieving community goals*

SPRING 2025 –  
SUMMMER 2025



**Preferred Alternative**

*Combine preferred alternatives concepts into the Preferred Plan*

FALL 2025 –  
FALL 2026



**Element Development**

*Using community input, develop elements for public review*

WINTER 2026



**Hearings and Adoption**

*Elements go to decisionmakers for consideration*

*\*Community engagement opportunities and feedback loops (where the City shares how input has been incorporated) to occur at all steps*

# Community Engagement



Image: Deeply rooted youth fellows and Unity council members at the Oakland General Plan table, Source: Karla Guerra



A. "Kamren" Khan, @ak2web3, and Jessica Lee, @jessicazlee, discuss their vision for Oakland's future @oaklandsource.



## Focus on Oakland's most impacted residents

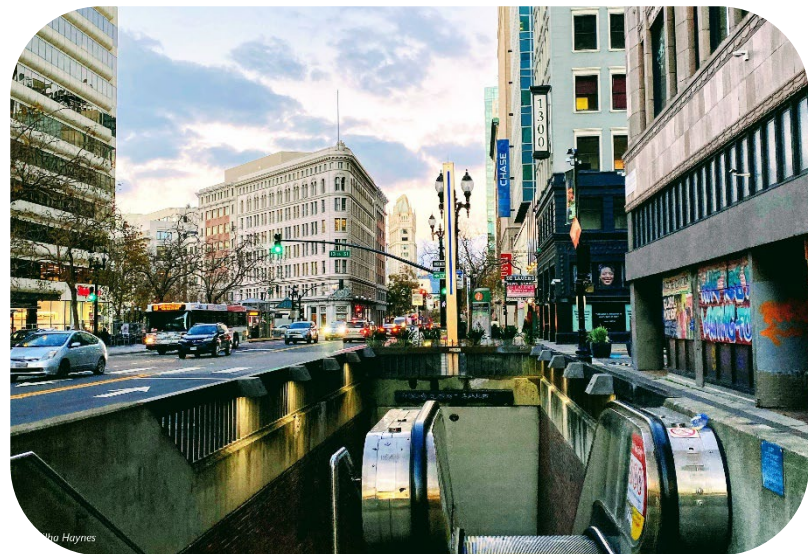
- Working class communities
- Communities of color
- Unhoused
- Formerly incarcerated
- Youth
- Communities experiencing environmental injustices

## Community Events:

- Tabling at Existing Community Events
- Neighborhood and Townhall Workshops
- Discussion Groups
- Decisionmaker Meetings
- Online Engagement

# Phase 2 Components

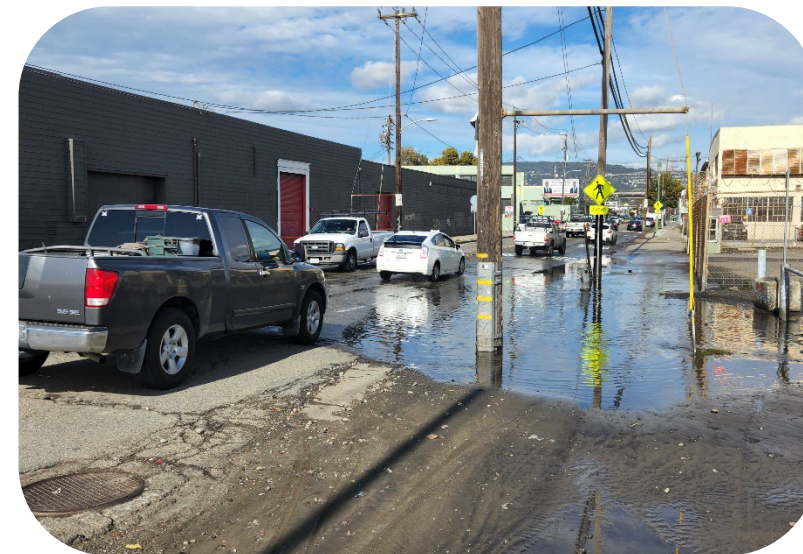
# Phase 2 Elements



**Land Use and  
Transportation  
Element**



**Open Space,  
Conservation, and  
Recreation (OSCAR)**



**Infrastructure and  
Facilities**



**Noise**

# Which Phase 2 General Plan topics are you most interested in?

- **Transportation:** Build a transportation system where everyone has access to safe and reliable options to get them where they need to go
- **Neighborhood Land Use:** Create more livable and walkable neighborhoods where folks have access to the things they want and need, like grocery stores, arts & entertainment, retail, libraries, and parks
- **Employment:** Support a strong economic base in the city, including future industries and small businesses
- **Parks and Recreation:** Develop parks and recreational spaces, focusing on the most underserved neighborhoods, so that everyone can access and enjoy natural spaces
- **Noise:** Protect neighborhoods adjacent to freeways, airports, and industrial activities from excessive noise
- **Infrastructure:** Improve our city's infrastructure, from roads, bridges, and sidewalks to facilities such as public restrooms and fire stations



# Land Use and Transportation Element (LUTE)

**Land Use:** How Oakland will grow and change, and what will be preserved and maintained

- Population, housing, and economic development/jobs
- Kinds, locations, and intensities of land uses
- Intentional focus on neighborhood needs and social equity
- Arts, history, and culture

**Transportation:** How destinations in Oakland and beyond will be linked and connected

- Movement of people and goods
- All types of transportation systems
- Transportation system safety, comfort, convenience, and accessibility
- Reducing greenhouse gases



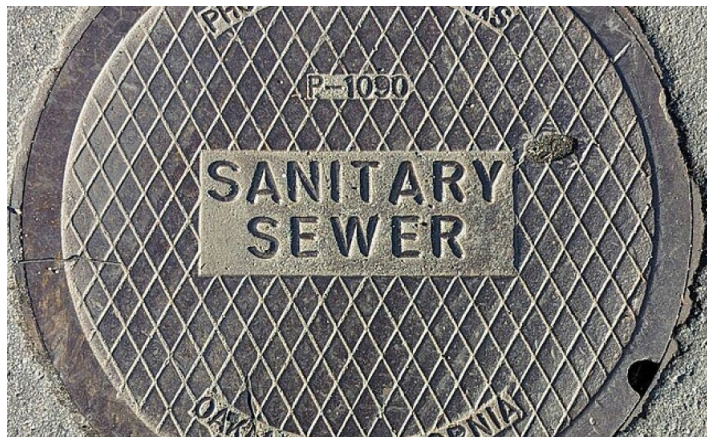
# Infrastructure and Public Facilities Element

**Infrastructure:** Plan for well-maintained, resilient, and high-quality critical systems that serve the city and its people.

- Water + Sewage
- Storm drainage and flood control
- Solid waste & recycling
- Gas and electricity
- Communications (including Internet)
- Roadway improvements

**Public Facilities:** Support an equitably distributed, and well-maintained network of public facilities that support Oaklanders' health and well-being.

- Libraries
- Educational facilities
- Recreation and community centers
- Fire and police stations
- Other civic buildings



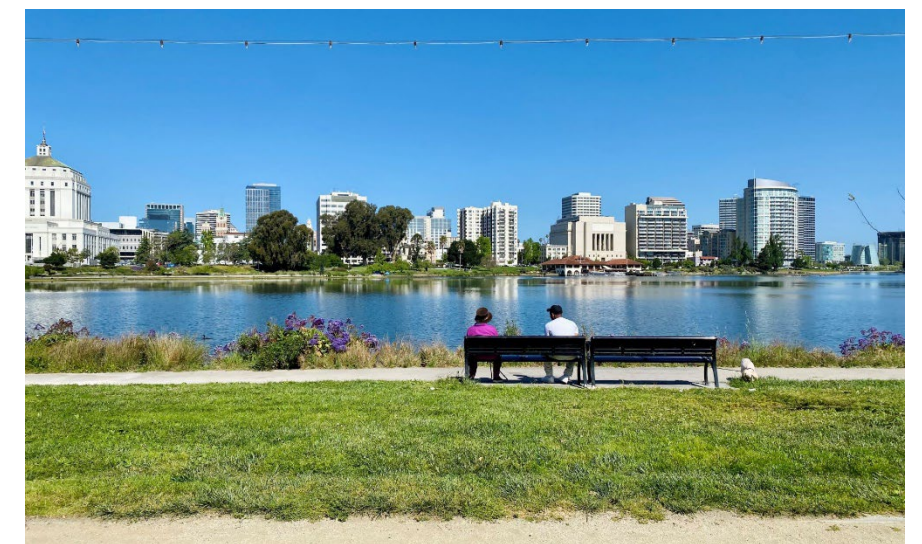
# Open Space, Conservation, and Recreation (OSCAR) Element

**Open Space and Conservation:** Maintain, preserve, & strengthen Oakland's network of open spaces and conserve important natural resources Kinds, locations, and intensities of land uses

- Open space network connections and accessibility
- Habitat management

**Recreation:** Build an equitable, well-maintained, accessible network of parks and recreational facilities that support and reflect Oaklander's needs, identities and cultures

- Types of parks and distribution throughout city
- Parks maintenance, safety, and security
- Parks programming, events, arts & culture



# Noise Element

Minimize the adverse effects of noise pollution on public health while promoting a high quality of life for residents

Noise sources include:

- Roadways
- Rail operations
- Industrial facilities
- Airports



# Discussion

# LUTE – Big Picture Questions

1. What are **issues** the commission is working on that could be addressed through land use solutions?
2. Which types of **neighborhood land uses** should be prioritized (e.g., cultural and community centers, manufacturing spaces, etc.?)
3. What **future jobs/industries** should City focus on s?
4. How can land use planning and policies create more **equitable distribution of opportunity** in our neighborhoods?
5. How can the plan build upon existing work and **community planning efforts and priorities**?

# Infrastructure & Public Facilities – Big Picture Questions

1. What **types of infrastructure improvements** should the city prioritize?
2. How can the city meet **existing** and **future infrastructure** and service needs?
3. How should these improvements be **prioritized** and **funded**?
4. How should the city address **climate resilience** in infrastructure and facilities planning?

# OSCAR – Big Picture Questions

1. How can the city fund and more efficiently address **parks maintenance**?
2. How can we create **more connections** and build a more robust **network of green spaces**, parks, the shoreline, and other open space amenities throughout the city?
3. How can the city support the **urban forest and habitat management**?
4. How can the city bring back land into **Indigenous stewardship**?



# Noise – Big Picture Questions

1. How can the city **protect neighborhoods and sensitive uses** from major noise sources in operation (e.g., freeways, airports, and industrial uses)?
2. What specific noise **standards and criteria** should be developed or changed? How should these be monitored and enforced?
3. What are ways to **support music** and other **sound-friendly policies**?

# Next Steps

- Visit the website and sign up for the mailing list:  
[oaklandca.gov/gpu](https://oaklandca.gov/gpu)
- Stay tuned for other community events and opportunities to engage



# BAC 2025 Strategy

Oakland, CA | January 2, 2025



# Budget Advisory Commission 2025 Strategy



**Vision** | a trusted, respected voice of Oakland residents providing thoughtful, vetted insights, feedback, and options to solve our City's budget crisis transparently

## Build a Great BAC Team

### Actions

- Fill six vacant positions with people with engagement, finance, legal, union, and analytic skill sets
- Develop strong working relationship with City Council
- Develop strong working relationship with City

### Targets

- *Jan*: candidates identified
- *Mar*: seats filled

## Dig Deep for Insights and Feedback

### Actions

- Regularly engage communities to hear perspectives and increase city budget literacy
- Conduct targeted research with interviews, data analytics, and learnings from other cities to inform recommendations

### Targets

- *Jan-Feb*: resident survey
- *Quarterly*: research briefs on specific budget questions
- *Quarterly*: community engagement event/campaign

## Provide Concrete, Evidence-Based Recommendations

### Recommendation Components

- Action for City Council
- Cost benefit analysis
- Key success metrics
- Equity implications
- Alignment with community priorities

### Targets

- *At least quarterly*: specific (#?) recommendations for City Council that combined, could close \$50M in structural deficit

# City Council Briefing Book

Oakland, CA | January 2, 2025

Jane Yang, Budget Advisory Commission (BAC) Chair  
Mike Forbes, BAC Vice Chair



# Contents

## Who We Are

- Purpose of Budget Advisory Commission
- Current commissioners

## Financial Facts

### *Oakland and Comparison Cities*

- Trends in revenue and expenses
- Trends in workforce compensation
- Patterns in Council's fiscal decisions

## Next Steps

- Past work
- Future collaborations

# **Who We Are**

City of Oakland Budget Advisory Commissioners

# Purpose of Budget Advisory Commission (BAC)

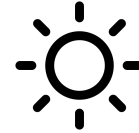


## **advises the City Council**

on expenditures, revenues, and financial policies



**encourages public participation** and input into fiscal decision making



**improves transparency and accountability** of City fiscal information and decision making

**Meetings:** the BAC generally meets on the second Wednesday of the month

**Our website:** <https://www.oaklandca.gov/boards-commissions/budget-advisory-commission>



# BAC Commissioners

Appointer	Commissioner
District 1 Councilmember	<a href="#">Jane Yang, Chair</a>
District 2 Councilmember	Margaret Grimsley
District 3 Councilmember	<b>Vacant</b>
District 4 Councilmember	<a href="#">Mike Petouhoff</a>
District 5 Councilmember	<a href="#">Stephisha Ycoy-Walton</a>
District 6 Councilmember	<b>Vacant</b>
District 7 Councilmember	<a href="#">Armand Bryan</a>
At Large Councilmember	<b>Vacant</b>
City Auditor	<a href="#">Mike Forbes, Vice Chair</a>
Economic Development Committee	<a href="#">Mandela Bliss</a>
Financial Management Committee (2)	<b>Vacant (2)</b>
Mayor	<a href="#">Lupe Garcia</a>
Mayor	<a href="#">Larisa Casillas, FMC Liaison</a>
Mayor	<b>Vacant</b>

We have 6 vacant positions.  
**Your help is needed to fill  
vacancies!**

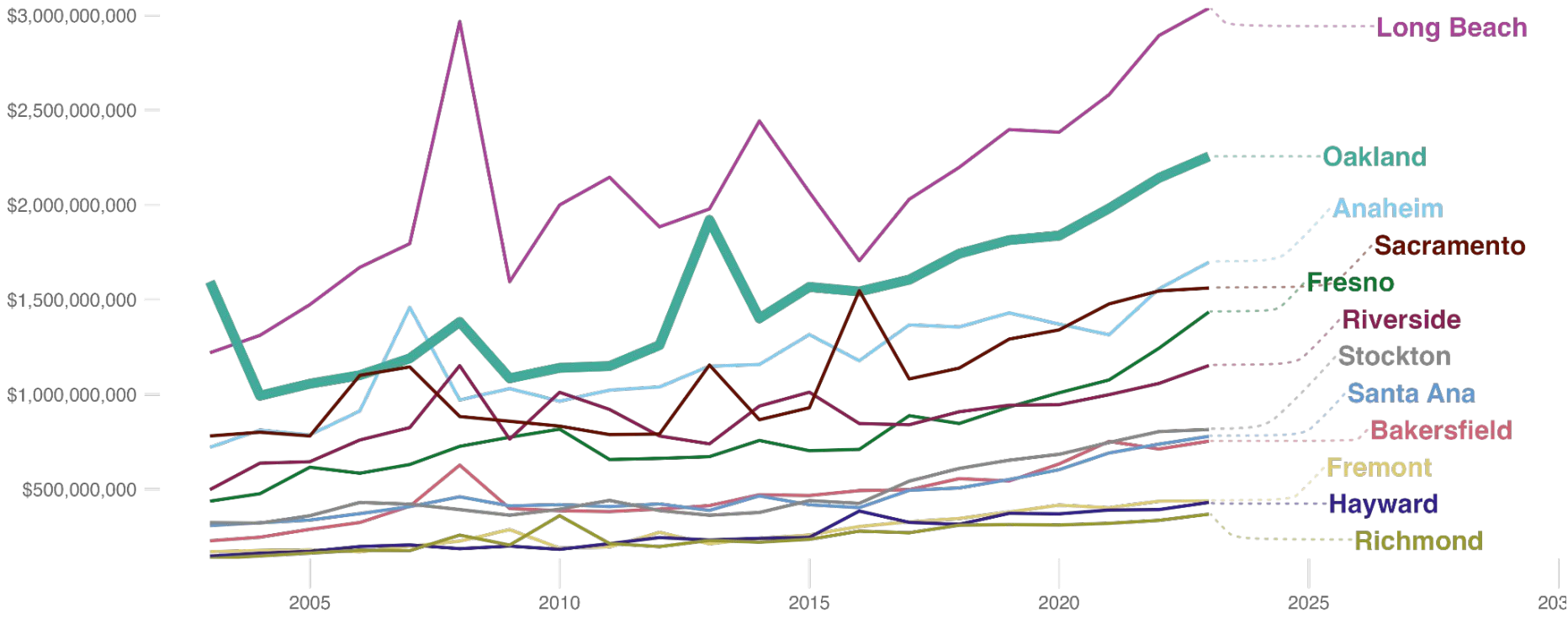
# **Financial Facts**

A Long and Wide View

# Trends in Revenue and Expenses

# How have total revenues changed over time?

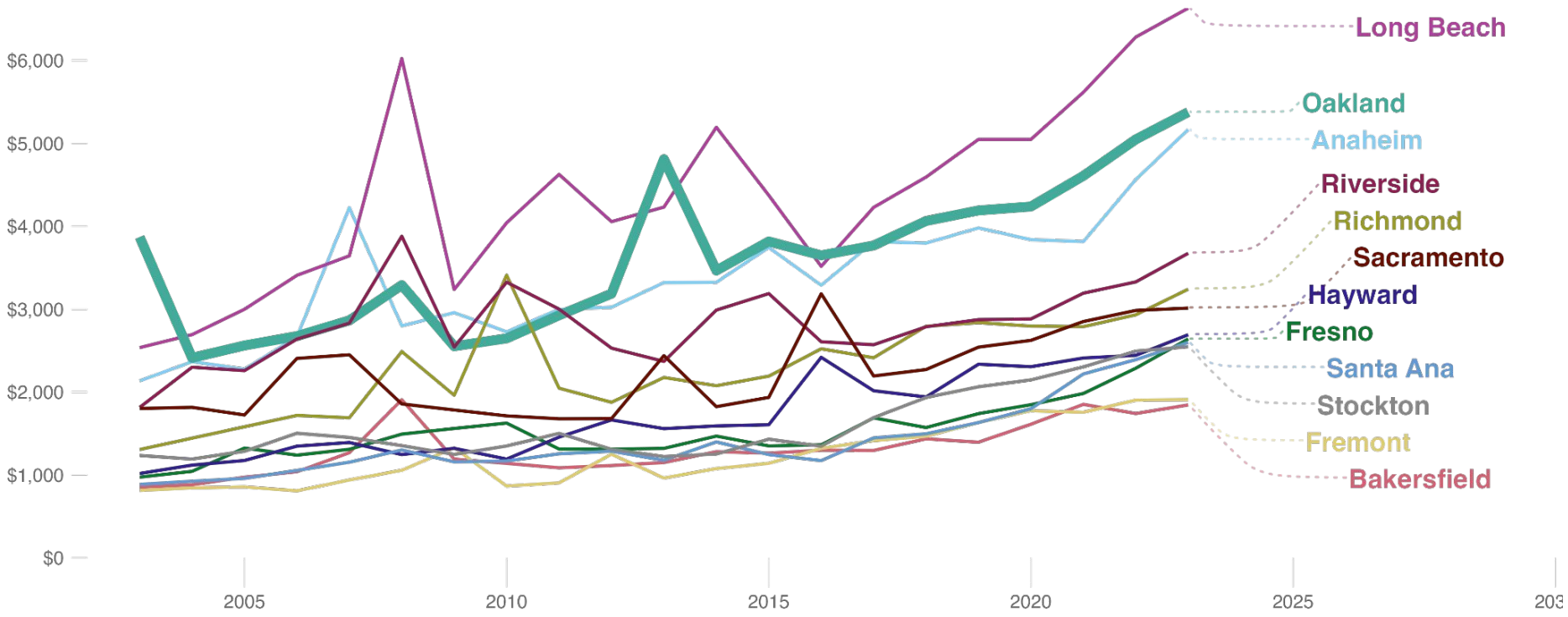
Inclusive of both general purpose and restricted funds



Data from California State Comptroller (<https://bythenumbers.sco.ca.gov/browse>) • Visualization by Commissioner Yang

# How have total revenues per capita changed over time?

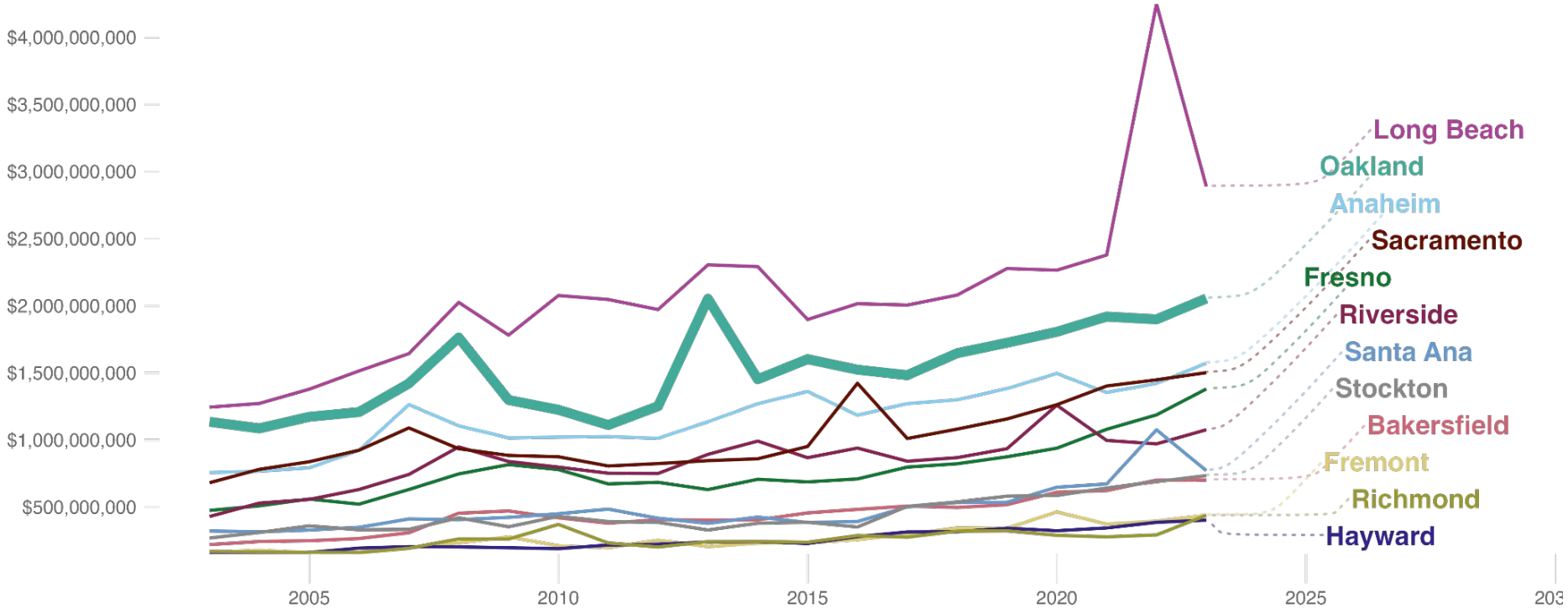
Inclusive of both general purpose and restricted funds



Data from California State Comptroller (<https://bythenumbers.sco.ca.gov/browse>) • Visualization by Commissioner Yang

## How have total expenditures changed over time?

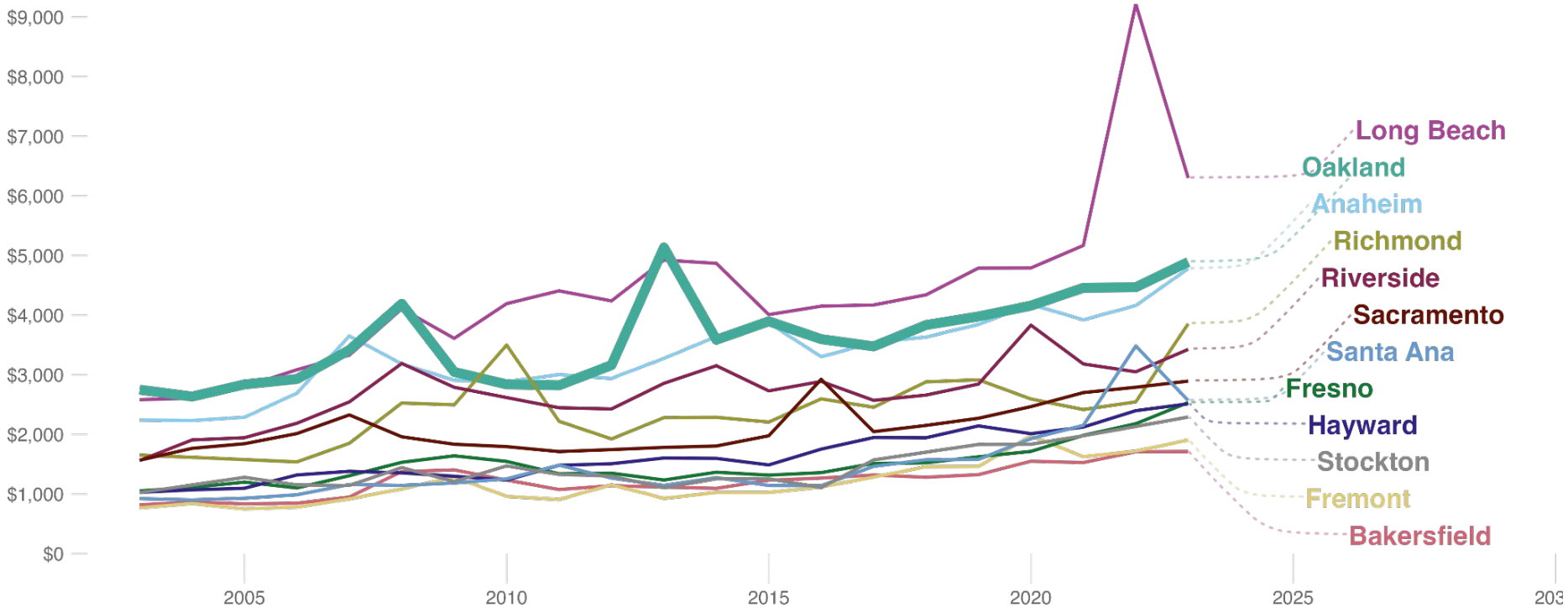
Inclusive of both general purpose and restricted funds



Data from California State Comptroller (<https://bythenumbers.sco.ca.gov/browse>) • Visualization by Commissioner Yang

## How have total expenditures per capita changed over time?

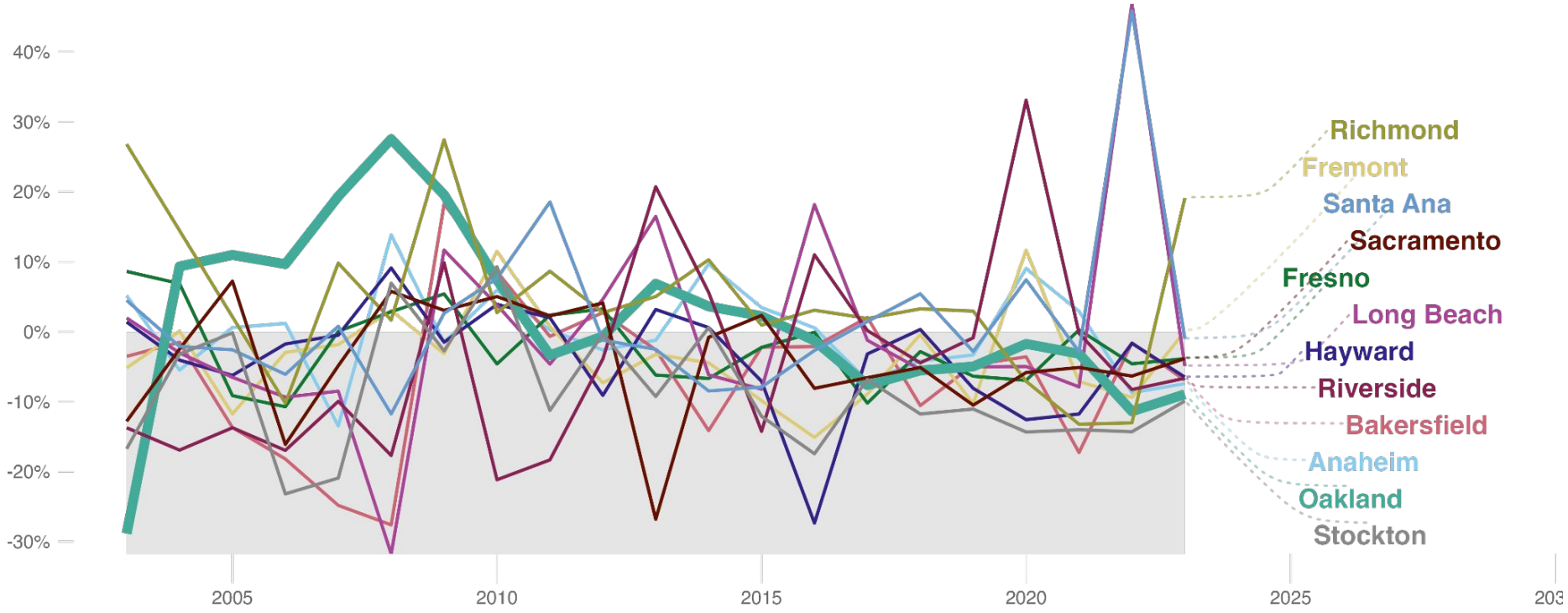
Inclusive of both general purpose and restricted funds



Data from California State Comptroller (<https://bythenumbers.sco.ca.gov/browse>) • Visualization by Commissioner Yang

## How have net actuals as a percent of revenue changed over time?

Inclusive of both general purpose and restricted funds

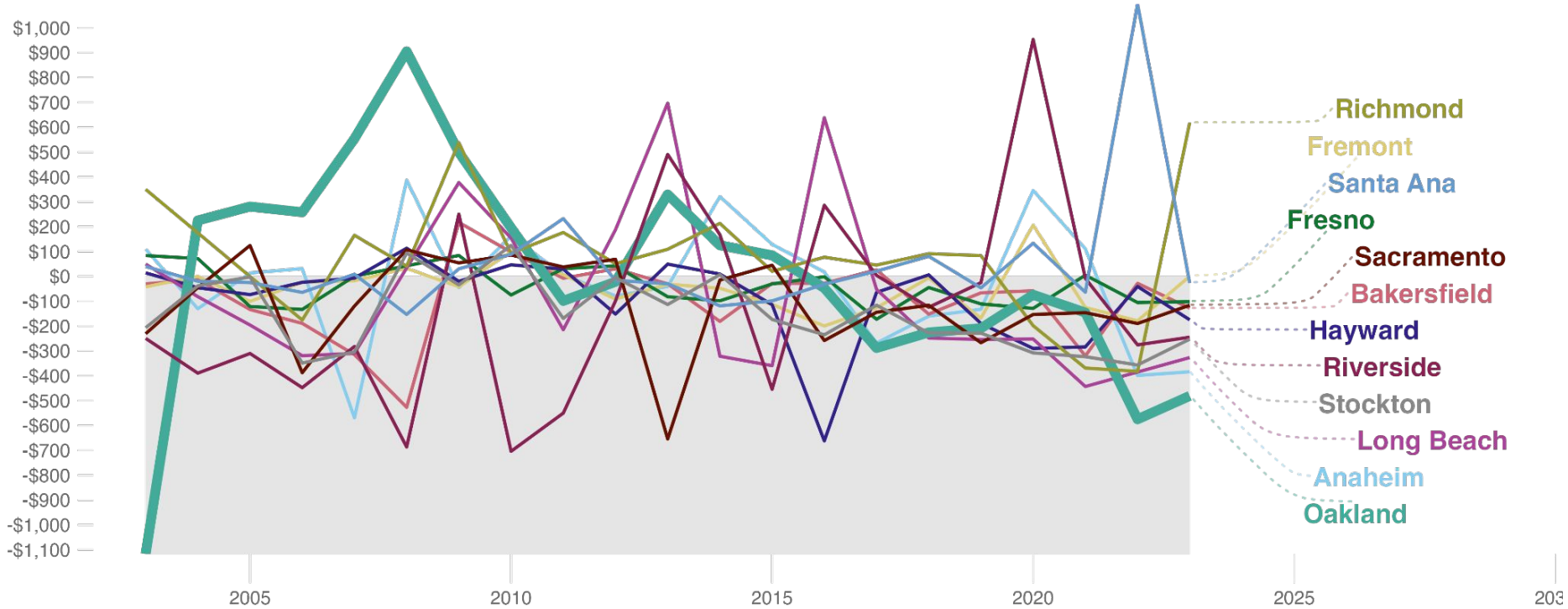


Data from California State Comptroller (<https://bythenumbers.sco.ca.gov/browse>) • Visualization by Commissioner Yang



## How have net actuals per capita changed over time?

Inclusive of both general purpose and restricted funds; omitting 2008 and 2022 Long Beach outliers

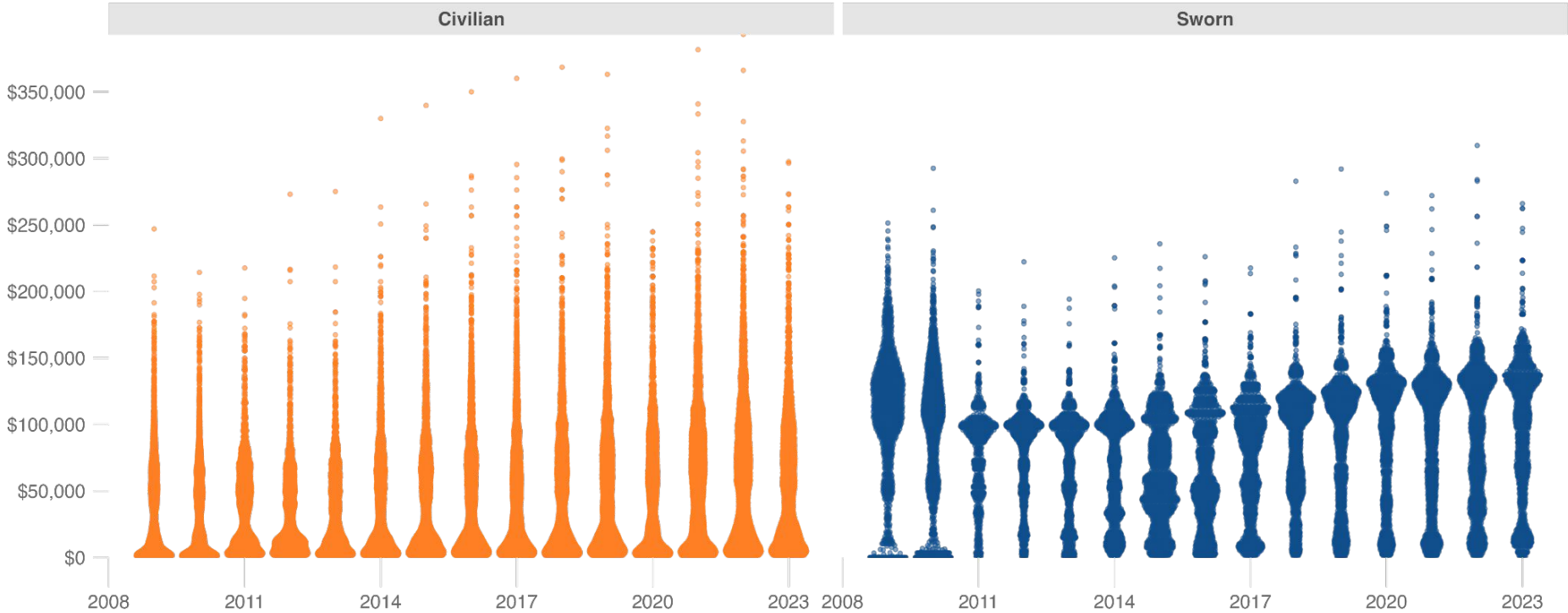


Data from California State Comptroller (<https://bythenumbers.sco.ca.gov/browse>) • Visualization by Commissioner Yang

# Trends in Workforce Compensation

# How much are City of Oakland employees paid?

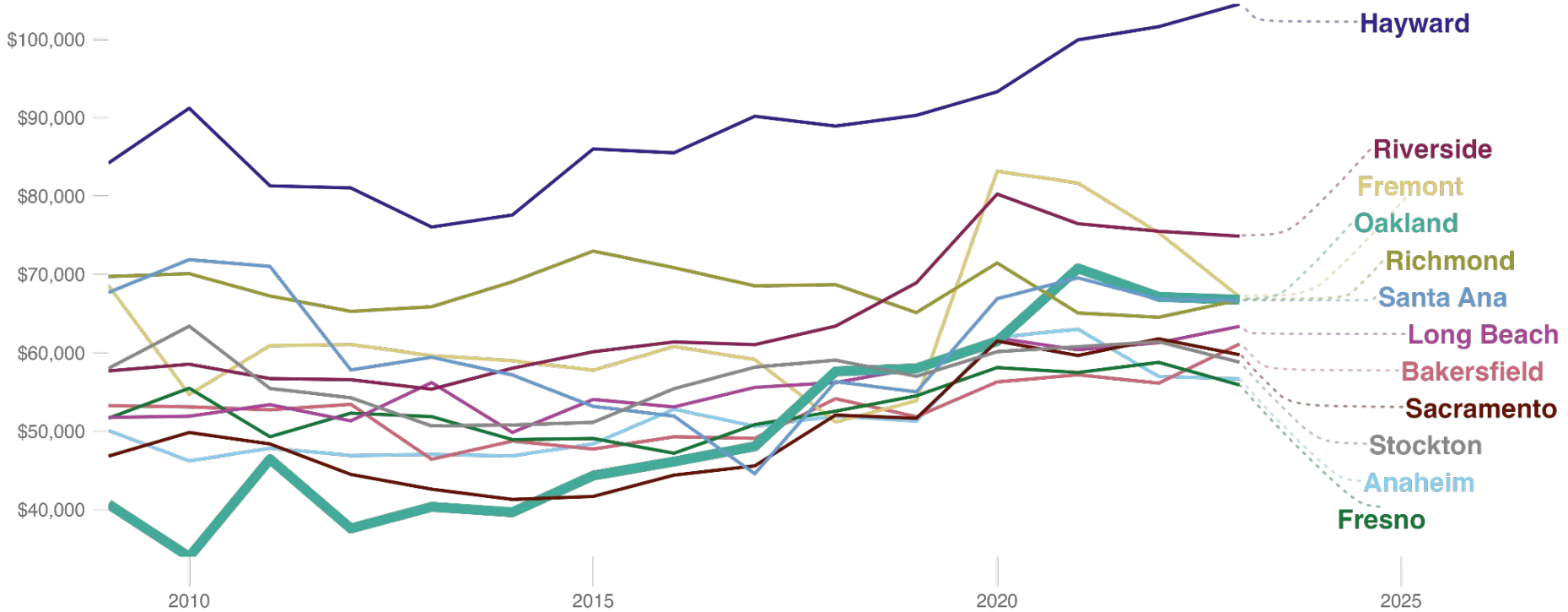
Each dot represents a city employee; excludes those with <\$0 reported regular pay



Data from California State Comptroller (<https://publicpay.ca.gov/>) • Sworn status estimated by having 'Fire', 'Police', or 'Battalion' in job title • Visualization by Commissioner Yang

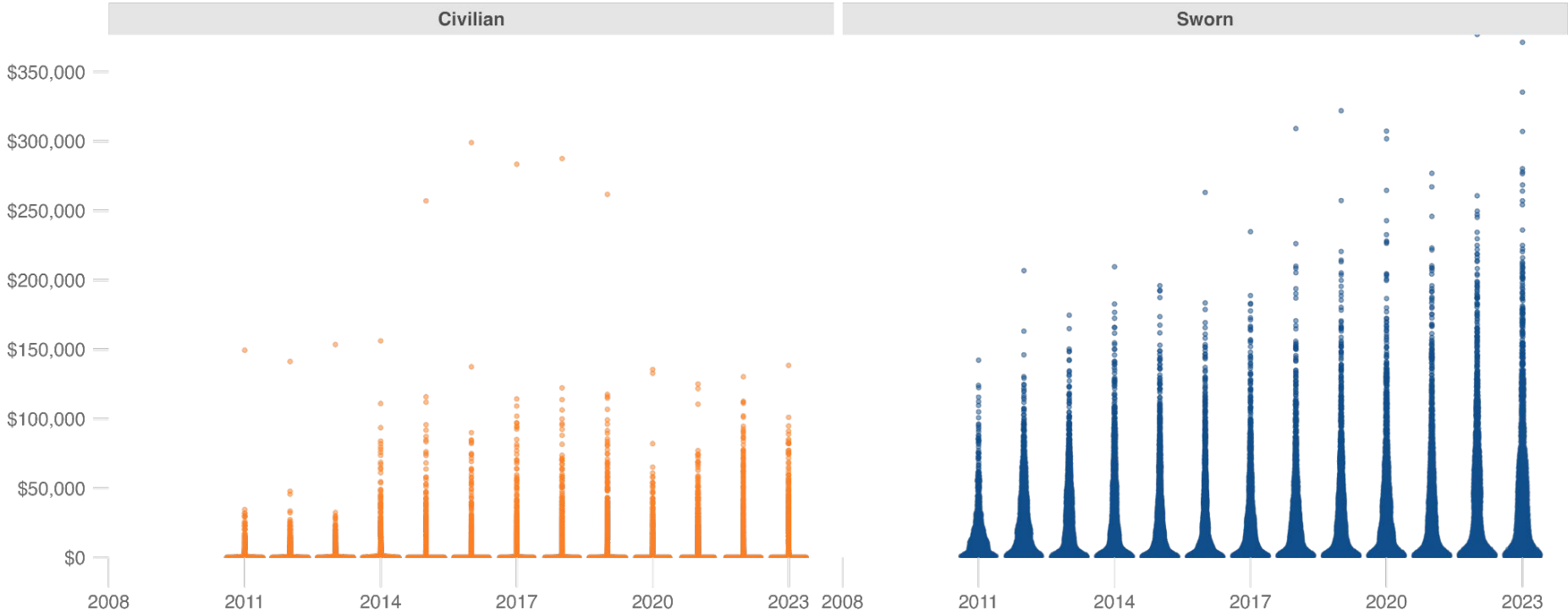
## How has the median city employee's regular pay changed over time?

Pay has increased faster for Oakland city employees compared to most peer cities in California



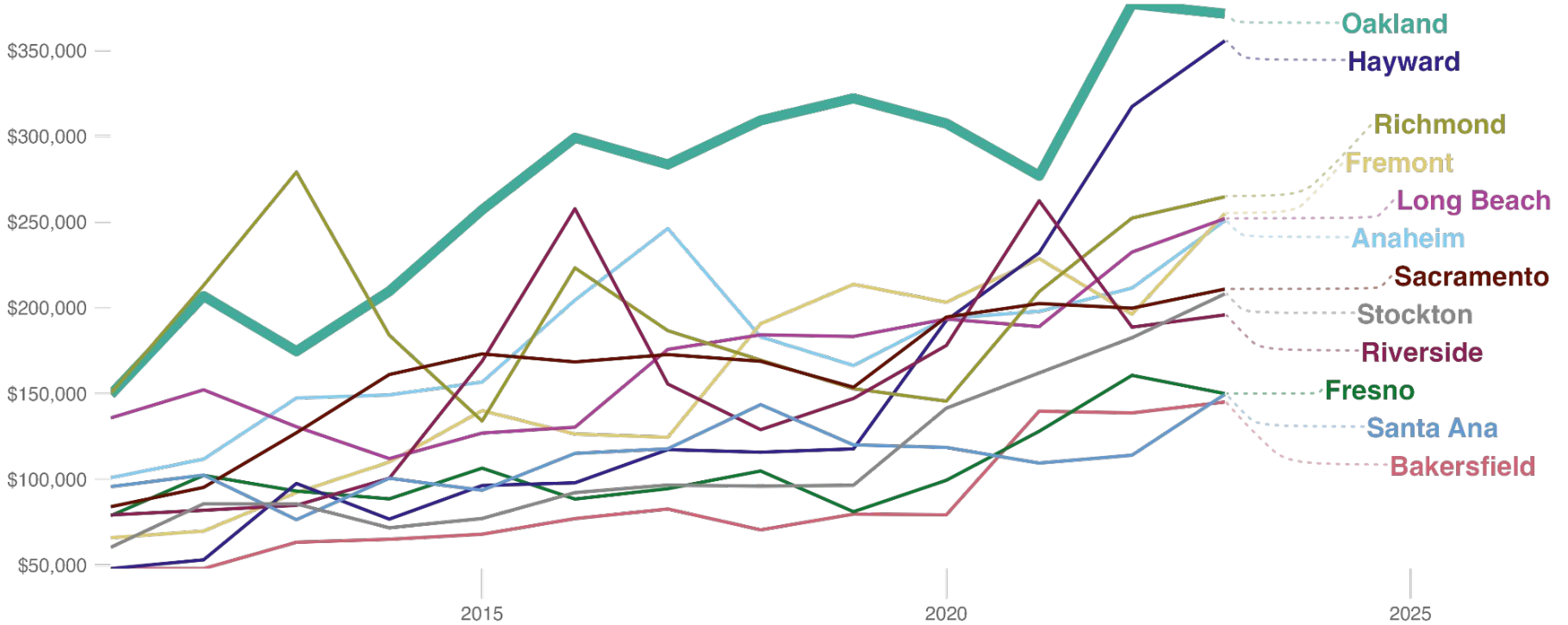
## How much overtime do City of Oakland employees get?

Each dot represents a city employee; excludes those with <\$0 reported overtime pay



## What is the most overtime pay an employee has received?

Since 2014, an Oakland employee has received the most overtime pay amongst peer cities in California



Data from California State Comptroller (<https://publicpay.ca.gov/>) • Sworn status estimated by having 'Fire', 'Police', or 'Battalion' in job title • Visualization by Commissioner Yang

75+

employees have received >\$100k/year average overtime pay

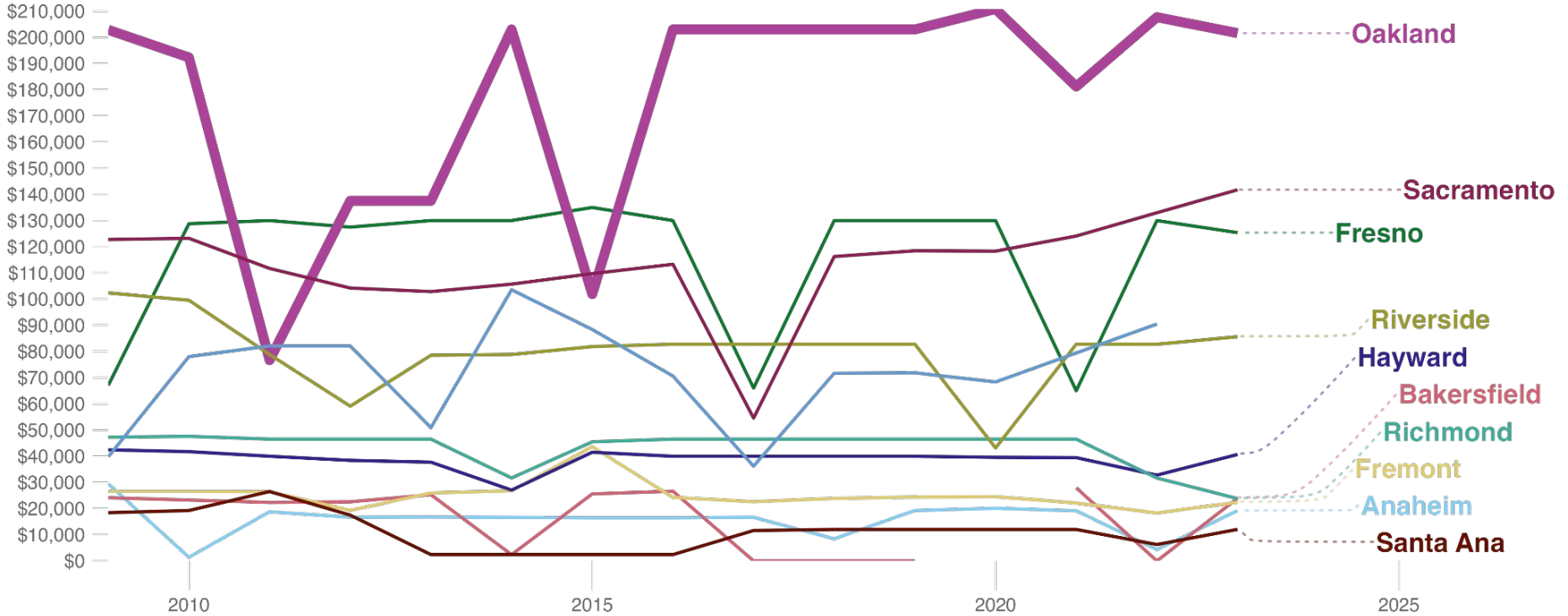
\$371,348

highest overtime pay to a single employee in 2023

Top Overtime Pay Earners				
Fiscal Year	Position	Regular Pay	Overtime Pay	Overtime as % of Regular Pay
2011	Engineer, Civil (Office)	\$95,335.77	\$149,449.26	157%
2012	Police Officer (PERS)	\$98,850.00	\$206,825.00	209%
2013	Police Officer (Pers)	\$103,756.00	\$174,686.00	168%
2014	Captain of Fire Department	\$123,765.00	\$209,624.00	169%
2015	Engineer, Civil (Office)	\$105,138.00	\$257,097.00	245%
2016	Engineer, Civil (Office)	\$108,841.00	\$299,102.00	275%
2017	Engineer, Civil (Office)	\$112,859.00	\$283,514.00	251%
2018	Captain Of Fire Department	\$135,594.00	\$309,185.00	228%
2019	Police Officer (Pers)	\$128,301.00	\$322,071.00	251%
2020	Battalion Chief	\$185,336.00	\$307,389.00	166%
2021	Sergeant of Police (PERS)	\$160,829.00	\$276,959.00	172%
2022	Sergeant Of Police (Pers)	\$156,743.00	\$376,998.00	241%
2023	Sergeant Of Police (Pers)	\$158,059.00	\$371,348.00	235%

## How much do mayors earn?

Oakland pays its mayor significantly more than peer cities in California



Data from California State Comptroller (<https://publicpay.ca.gov/>) • Visualization by Commissioner Yang



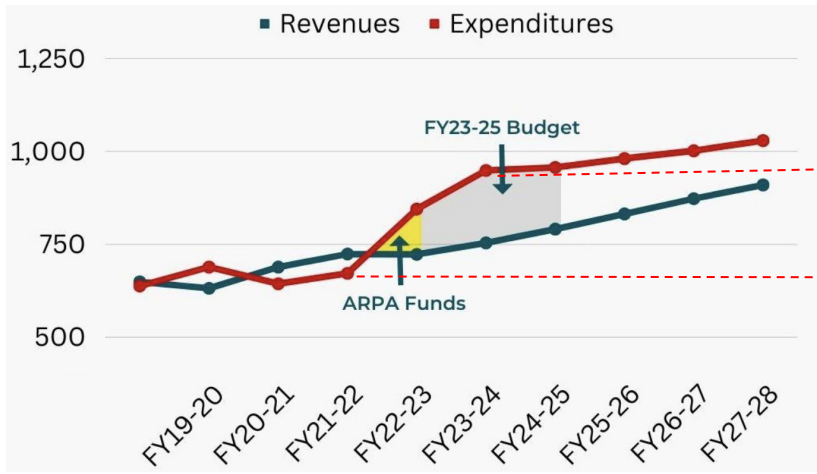
# Patterns in Council's Fiscal Decisions

Oakland significantly increased ongoing expenses between FY21-22 and FY23-24, exceeding approved budgets as a result.

Combined with the revenue shortfalls, Oakland now has a structural deficit of over \$125M.

### General Purpose Fund

FY 19-22 Actuals and FY 23-28 Forecast (\$)

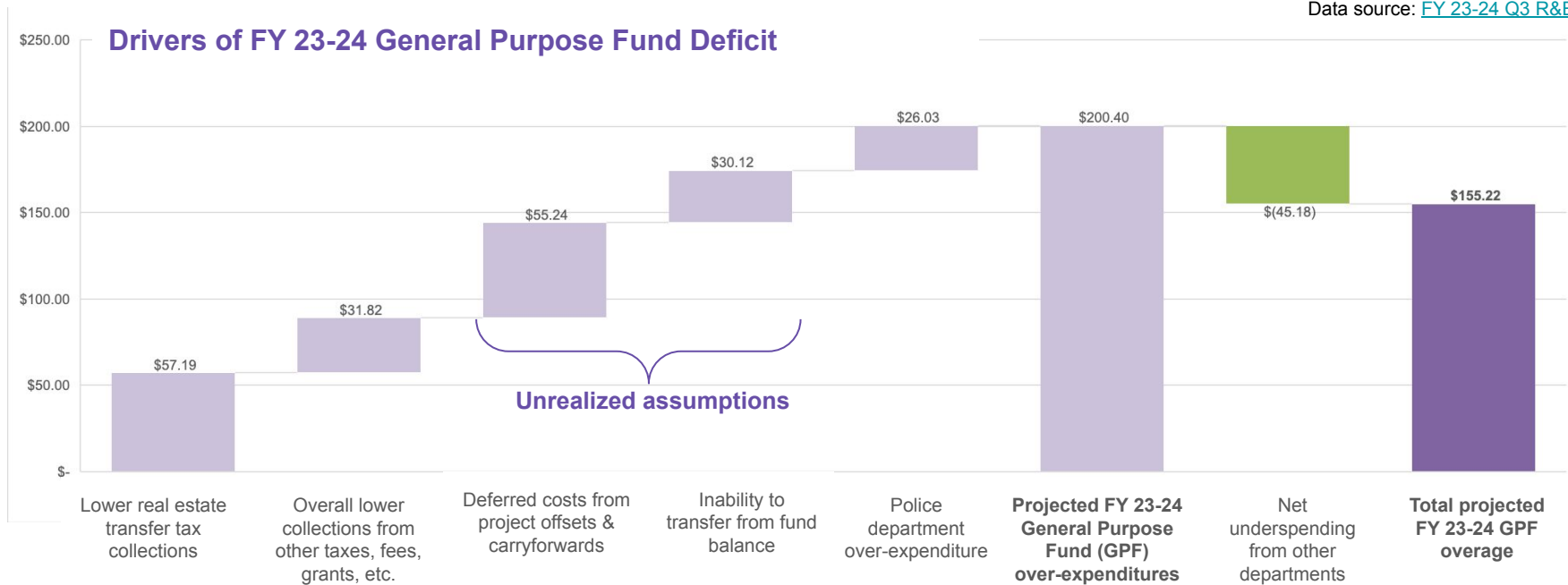


As shared in the [FY 23-25 Budget Community Forums presentations held in June 2023](#), ongoing General Purpose Fund expenses jumped in FY 22-23 and again in FY 23-24. A big driver is [city leadership's choice to open the Oakland Police Officers contract](#) well before expiration, granting wage increases to the police.

Graph source: [FY 23-25 Budget Community Forums PPT](#)

Since FY21-22, Oakland has also depended on meaningful amounts of assumed fund transfers and carryforwards to balance the budget.

These unrealized assumptions accounted for \$85M in FY 23-24, which was 55% of the FY 23-34 General Purpose Fund (GPF) shortfall.



Data source: [R&E reports](#)

# Since FY19-20, Oakland has overridden [Consolidated Fiscal Policy \(CFP\)](#) limits on use of one-time revenue or excess RETT for ongoing expenses.

The City has used excess Real Estate Transfer Tax (RETT), Coronavirus Aid, Relief, and Economic Security Act (CARES), and American Rescue Plan Act (ARPA) one-time funds to maintain services post-COVID. CARES funds ended in 2020 and ARPA funds ran out Dec 31, 2024.

Adopted Budget	Adhered to Section 1, Part C? <i>Excess RETT should be used for reserves, retiring debt, and funding unfunded long-term obligations</i>	Adhered to Section 1, Part D? <i>Unrestricted one-time revenues should be used for one-time expenses</i>
<a href="#">FY 17-18</a>	✔ Replenished reserves, paid down liabilities	✔ Funded one-time expenses, paid down liabilities
<a href="#">FY 18-19</a>	✔ Replenished reserves, paid down liabilities	✔ Funded one-time expenses, paid down liabilities
<a href="#">FY 19-20</a>	✔ Replenished reserves, paid down liabilities	✘ Waived for parks and paramedics
<a href="#">FY 20-21</a>	● N/A - no excess RETT	✘ Waived for parks and paramedics
<a href="#">FY 21-22</a>	✘ Used for ongoing expenses	✘ Waived for libraries, parks, fire, youth, other funds
<a href="#">FY 22-23</a>	✘ Used for ongoing expenses	✘ Waived for libraries, parks, fire, youth, other funds
<a href="#">FY 23-24</a>	● N/A - no excess RETT	✘ Waived for libraries, parks, fire, youth, other funds
<a href="#">FY 24-25</a>	● N/A - no excess RETT	✘ Waived

post-COVID

# If Oakland continues to consistently spend more than it earns, **all residents will pay the price**

This remains true even if budget choices are done with the best of intentions to provide useful services. Irresponsible fiscal decisions cause harm to Oakland's residents, employees, and businesses, and community organizations.

# **What We've Done and What We're Doing**

## Past Recommendations and Future Collaborations

# BAC FY24-25 Midcycle Budget Recommendations

Presented to City Council June 2024 | [Read the full recommendation](#)

1. The City and Council should spend the next year identifying evidence base adjustments to structurally balance the budget by 1) examining both revenue AND expenses and 2) learning from the experiences of other similar cities in California
2. Structural budget adjustments should come with clear communication of estimated effect on public priorities: reducing homelessness and improving public safety
3. Oakland should break its habit of waving limits in the Consolidated Fiscal Policy, establish more discipline in replenishing emergency funds, and be more transparent on the budget's effect on the City's fiscal health

# BAC Budget Rebalancing Recommendations

Presented to City Council December 2024 | [Read the full recommendation](#)

- 1. Design taxes to raise revenue from those who can afford it
- 2. Allocate potential revenue from the one-off Coliseum sale to pay down liabilities and shoring up reserves
- 3. Prioritize essential service delivery, performance measures, and equity in discussions with the City's workforce
- 4. Work closely with the Police Department to identify more realistic budget adjustments, especially focusing on reducing overtime spending and re-examining compensation



# The BAC seeks a partnership with the City Council

**We implore the City Council to recognize that to achieve the fiscal resiliency that a healthy city needs, we must significantly change from the status quo approach to more responsible budgeting and management of expenditures based on actual certified revenue.**

BAC will be focusing on delivering evidence based, thoroughly analyzed recommendations to solve our fiscal crisis. Key activities and timeline:

- **January:** field resident survey to get input on city priorities for budget ([please share the survey!](#))
  - **Objectives:** understand resident satisfaction with city services, priorities, and willingness to accept specific budget cut options
  - **Implementation:** the City’s survey vendor budget was cut but BAC will field and analyze using free tools
  - **Accessibility:** attempting to translate into Spanish and Chinese (not yet available); will attempt to augment with live listening sessions
- **February:** resident survey results
- **March / April:** review of council member spending priority statements
- **March through May:** concrete expense reduction and revenue increase proposals

## Other Helpful Resources

- [BAC memo on FY23-25 budget process](#)
- [City Auditor report on City of Oakland's Financial Condition between FY 2012-13 and 2021-2022](#)

*Note: this report uses Oakland's annual audited financial reports as the data source. The data sources for this briefing book are from the State of California's Comptroller, who has compiled data reported by cities. There are differences in the absolute numbers between the two sources but relative trends are consistent.*

- [Reimagining Public Safety Task Force recommendations and final report](#)