

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, February 12, 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 & Walter Silva – *Finance Department*

Meeting Agenda:

1. Administrative Matters [5 minutes]
 - Welcome & Attendance
2. Presentation From Safer Outside and TGNDQ (Trans* & Gender Nonconforming people Demanding Opportunity) [30 minutes]
3. Approval of Prior Meeting Minutes [5 minutes]
 - **VOTES:** Meetings of April 10, 2024; May 23, 2024; June 6, 2024; July 10, 2024; September 11, 2024; November 13, 2024, and December 11, 2024
 - Meeting of January 8, 2024 moved to next meeting
4. Commissioners' protocol [5 minutes]
 - Commissioner Application review
 - Onboarding & Exit / Recruitment – Open spots
5. Finance Department and City Council Update [15 minutes]
 - Current Year Budget Balancing Actions Update
 - Finance & Management Committee Update
6. Preliminary Analysis of Public Survey [30 minutes]
 - **VOTE:** Delegation of Survey Report Finalization to BAC Leadership Team Such That Results Can Be Shared with the Public, City Council, Mayor, And City Administration By Feb 28 In Order To Allow At Least Two Weeks Before City Council Budget Priority Statements Are Due (Mid-Mar)

**CITY OF OAKLAND
BUDGET ADVISORY COMMISSION**

7. 2025-2026 Calendar Year Strategy [5 minutes]
 - **VOTE:** Adoption of 2025 Calendar Year Strategy
8. Update From Public Safety Ad Hoc Group [5 minutes]
9. Action Commitments: Self-Reported Budget Advisory Commission Time prior to March 12, 2025 Meeting [10 minutes]
10. Agenda Items for Future Meetings [5 minutes]
11. Open Forum [5 minutes]
12. Adjournment

Attachments: Draft Meeting Minutes of BAC Meetings held April 10, 2024; May 23, 2024; June 6, 2024; July 10, 2024; September 11, 2024; November 13, 2024; and December 11, 2024; BAC Strategy 2025; and Oakland FY 25-27 Budget Resident Survey presentation

**CITY OF OAKLAND
BUDGET ADVISORY COMMISSION**

Hi there,

You are invited to a Zoom webinar.

When: February 12, 2025 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)

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+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

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Webinar ID: 815 8476 3954

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

CITY OF OAKLAND

BUDGET ADVISORY COMMISSION

Meeting of the City of Oakland Budget Advisory Commission (BAC) held
Wednesday, April 10, 2024, at 6:00 PM.

The Budget Advisory Commission meeting was held in Hearing Room 2 in City Hall.

Commission Members:

Armand Bryan, Larisa Casillas, Guadalupe Garcia, Margaret Grimsley, Reisa Jaffe, Mike Petouhoff,
Caitlin Prendiville, Sarah Price, Jane Yang

City's Representative(s):

Brad Johnson & Nathan Bassett – Finance Department

Meeting Minutes:

1. Administrative Matters

- Present: Commissioners Casillas, Garcia, Grimsley (departed at 7:35 PM), Jaffe, Prendiville (arrived at 6:15 PM), Price, Yang, and City of Oakland staff members Budget Administrator Johnson and Bassett
- Absent: Commissioners Bryan and Petouhoff
- Quorum was met for the duration of meeting
- Meeting was called to order by Chair Price at 6:05 PM

2. Approval of Prior Meeting Minutes

The Commission reviewed the minutes from the previous meeting. After a brief review period, Commissioner Grimsley made a motion to approve the minutes. Commissioner Casillas seconded the motion and all present commissioners voted "aye" to approve.

3. Commissioners' Protocol - Commissioner Applications & Vacancies

Staff reported that there are currently six vacancies on the Commission. One applicant (Auditor appointee) is expected to be appointed later in the month. Staff noted they would follow up with a previous interested party from last year. The Mayor's Office will be contacted regarding the appointment status of Commissioner Petouhoff, who needs to be reappointed.

4. Finance Department Update

Staff reported that the city is entering discussions with the City Administrator and Mayor regarding departmental budget proposals. More detailed deliberations about budget trajectory and alignment are expected in the coming weeks.

5. FY2023-24 Q2 R&E Report / FY2024-25 Deficit Report Discussion

Budget Administrator Brad Johnson presented the Q2 Revenue & Expenditure Report and FY2024-25 deficit projections. Key points included:

Current Year (FY2023-24):

- Projected general purpose fund operating deficit of \$177 million
- Revenue decline of approximately \$170 million
- \$8 million net over-expenditure
- Major revenue declines in:
 - Real Estate Transfer Tax (51% lower than budgeted)
 - Business License Tax
 - Sales Tax

Key expenditure updates:

- All departments except OPD are underspending their budgets due to vacancies
- Q2 vacancy rate is approximately 16.5% across general purpose fund
- OPD overtime spending has offset savings from other departments

FY2024-25 Outlook:

- Projected General Purpose Fund (GPF) deficit of \$175 million
- Additional \$45 million deficit in non-1010 (i.e. not GPF) funds
- Key deficit drivers include:
 - Continued real estate transfer tax decline
 - Increased costs for internal services and utilities
 - Rising insurance costs

Current Administrative Actions:

- Implementation of hiring freeze with limited exceptions
- Review of contracts and grant agreements
- Monthly revenue monitoring
- Focus on clean and safe city initiatives, youth programs, and revenue enhancement

6. 2024 Work Plan Update and Ad Hoc Study Groups

Community Engagement Ad Hoc Group Update:

- Met with representatives from the People's Budget Process coalition
- Discussed extending budget education initiatives for residents
- Proposed sending letter to encourage council members to host community forums during mid-cycle budget review
- Discussed recommendations for forum accessibility including:
 - Multiple scheduling options (business hours and evening)
 - Translation services
 - Partnership with community-based organizations

7. Agenda Items for Future Meetings

The Commission discussed potentially canceling the regular May meeting in favor of a special meeting on May 23rd to review the mid-cycle budget adjustment proposal, with May 29th or 30th as backup dates.

8. Open Forum

Commissioner Yang reported ongoing efforts to contact Open Budget Oakland representatives for future discussion.

9. Adjournment

The meeting was adjourned at 8:06pm.

These minutes were drafted using a large language model with a transcript of the meeting recording. They were reviewed and edited by a human for accuracy.

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CITY OF OAKLAND

BUDGET ADVISORY COMMISSION

Meeting of the City of Oakland Budget Advisory Commission (BAC)
held Thursday, May 23, 2024, at 6:30 PM.

The Budget Advisory Commission meeting was held in Hearing Room 2 in City Hall.

Commission Members:

Armand Bryan, Larisa Casillas, Mike Forbes, Guadalupe Garcia, Margaret Grimsley, Reisa Jaffe, Mike Petouhoff, Caitlin Prendiville, Sarah Price, and Jane Yang

City's Representative(s):

Brad Johnson & Nathan Bassett – Finance Department

Meeting Minutes:

1. Administrative Matters

- Present: Commissioners Forbes, Garcia, Grimsley, Petouhoff, Prendiville, Price, and City of Oakland staff members Bassett and Budget Administrator Johnson
- Absent: Commissioners Bryan, Casillas, Jaffe, and Yang (Commissioners Casillas and Yang were noted to be watching remotely due to illness)
- Quorum was met with six members present
- The meeting was called to order by BAC Chair Price at approximately 6:37pm.

2. Approval of Prior Meeting Minutes

Minutes were moved to the next meeting as staff had not had time to prepare them due to budget preparation work.

3. Commissioners' Protocol

Staff reported that some council offices are reviewing potential candidates but there were no updates on new appointments. Commissioner Forbes was welcomed as a new member.

4. Finance Department Update

Staff noted that the Mayor's budget would be released the following morning, along with Q3 R&E and additional revenue reports to be heard at the Finance and Management Committee meeting the following Tuesday. A public webinar was scheduled for Tuesday evening, with a special City Council meeting on Wednesday for initial budget review.

5. FY2023-24 Q3 R&E Report Discussion

Budget Administrator Brad Johnson presented key updates:

- Current year projections show:
 - Beginning fund balance of \$93 million
 - Projected revenue of \$715 million
 - Projected expenditures of \$871 million
 - Operating shortfall of \$155 million
 - Projected negative ending balance of \$62 million
- Plan to address deficit includes:
 - \$42 million from Coliseum site sale
 - \$20 million in reductions from prior expenditures and projects
 - \$10 million contingency cushion built into reductions
- Police Department projected to exceed budget by \$26 million, primarily due to overtime costs

6. FY2024-25 Midcycle Budget Discussion

Key points discussed:

- Structural deficit of approximately \$100 million in general purpose fund projected
- Additional \$50 million deficit projected in non-1010 funds
- One-time funding from Coliseum sale being used to bridge gap
- Staff implementing hiring freeze and reviewing contracts
- Discussion of potential service impacts if deeper cuts required:
 - Reduced police staffing
 - Fire engine brownouts
 - Recreation center closures
 - Reduced senior center hours
 - Limited animal shelter operations
 - Cuts to economic development initiatives

7. 2024 Work Plan Update and Ad Hoc Study Groups

The Commission discussed the formation of an ad hoc committee to review the mid-cycle budget adjustment and draft a response letter. **VOTE:** Commissioner Grimsley made a motion to delegate authority to the ad hoc committee to approve the letter if a quorum could not be achieved at the June 5th special meeting planned for formal approval. Commissioner Petouhoff seconded and all commissioners in attendance voted aye.

8. Agenda Items for Future Meetings

- Department of Race & Equity follow-up discussion
- Department of Economic & Workforce Development presentation request
- Review of consolidated fiscal policies
- Benchmarking study of comparable cities' budgets

9. Open Forum

None

10. Adjournment

The meeting was adjourned at approximately 8:23pm.

These minutes were drafted using a large language model with a transcript of the meeting recording. They were reviewed and edited by a human for accuracy.

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CITY OF OAKLAND

BUDGET ADVISORY COMMISSION

Meeting of the City of Oakland Budget Advisory Commission (BAC) held
Thursday, June 6, 2024, at 6:00 PM.

The Budget Advisory Commission meeting was held in Hearing Room 3 in City Hall.

Commission Members:

Armand Bryan, Larisa Casillas, Mike Forbes, Guadalupe Garcia, Margaret Grimsley, Reisa Jaffe, Mike Petouhoff, Caitlin Prendiville, Sarah Price, Jane Yang

City's Representative(s):

Nathan Bassett – Finance Department

Meeting Minutes:

1. Administrative Matters

The meeting was called to order at approximately 6:00 PM. Roll call was conducted:

- Present: Commissioners Casillas, Forbes, Grimsley, Petouhoff (arrived at approximately 6:08 PM), Price, Yang and City of Oakland staff member Bassett
- Absent: Commissioners Bryan, Garcia, Jaffe, and Prendiville
- Quorum was met for duration of meeting

2. Approval of Prior Meeting Minutes

Minutes were moved to the next meeting as staff had not had time to prepare them due to budget preparation work.

3. Finance Department Update

Staff reported that they are still in the budget process working on council amendments. A new commissioner appointment resolution will be going to City Council on June 18th to represent a council district.

4. FY2024-25 Midcycle Budget Amendments Discussion

The Commission conducted a detailed review of a draft presentation analyzing the midcycle budget amendments. Key discussion points included:

a) Budget Context Updates:

- Clarifications on Coliseum sale revenue figures and accounting
- Recommendations to reframe certain language and strengthen key messages

- Discussion of historical context around use of one-time funds
- Addition of benchmarking data from comparable cities

b) Formatting and Presentation:

- Suggestions for improved visual presentation and organization
- Discussion of font sizes and emphasis of key points
- Recommendations for additional context slides

c) Timeline Discussion:

Staff indicated the Mayor's budget will be released tomorrow with presentations to:

- Finance Committee on June 12th at 3:00 PM
- City Council special meeting on June 18th at 1:30 PM
- Regular council meeting on June 18th at 3:30 PM

The Commission reaffirmed the delegated authority to the ad hoc committee to finalize the presentation.

5. 2024 Work Plan Update and Ad Hoc Study Groups

The Commission discussed coordination of future work including:

- Next steps for the presentation to council
- Coordination of speaking roles and talking points
- Timeline for submission and review

6. Agenda Items for Future Meetings

Staff noted several upcoming items:

- Community survey input needed for November
- End of commissioner terms in September - six commissioners' terms expire
- Next regular meeting scheduled for July 10th
- Next week's meeting on June 12th to be canceled

7. Open Forum

No items were presented.

8. Adjournment

The meeting adjourned at approximately 7:15 PM.

CITY OF OAKLAND

BUDGET ADVISORY COMMISSION

Meeting of the City of Oakland Budget Advisory Commission (BAC) held
Wednesday, July 10, 2024, at 6:00 PM.

The Budget Advisory Commission meeting was held in Hearing Room 2 in City Hall.

Commission Members:

Armand Bryan, Larisa Casillas, Mike Forbes, Guadalupe Garcia, Margaret Grimsley, Reisa Jaffe, Mike Petouhoff, Caitlin Prendiville, Sarah Price, Jane Yang, Stephisha Ycoy-Walton

City's Representative(s):

Nathan Bassett – Finance Department

Meeting Minutes:

1. Administrative Matters

The meeting was called to order by Chair Price at 6:07 PM. Roll call was conducted:

- Present: Commissioners Bryan, Jaffe, Petouhoff, Prendiville, Price, Yang and City of Oakland staff member Bassett
- Absent: Commissioners Casillas, Forbes, Garcia, Grimsley, Ycoy-Walton
- A quorum of six out of eleven members was confirmed

2. Approval of Prior Meeting Minutes

Minutes from April, May, and June meetings were moved to next month's meeting.

3. Commissioners' Protocol

Staff reported a new commissioner, Commissioner Ycoy-Walton, was recently confirmed and will join next month. Five commissioners' terms expire in September 2024:

- Commissioner Price (termed out)
- Commissioner Jaffe (eligible for renewal)
- Commissioner Grimsley (eligible for renewal)
- Commissioner Casillas (eligible for renewal)
- Commissioner Garcia (eligible for renewal)

Commissioner Petouhoff must be reappointed before September to avoid timing out of holdover status. Staff to follow up with remaining commissioners about reappointment interest.

4. Finance Department Update

Staff provided updates on:

- Budget survey RFP to be issued, targeting November/December timeframe for survey implementation
- Budget retreat meetings beginning with departments
- Biennial budget process to begin in September
- Focus on helping departments understand financial constraints and need for service reductions

5. FY2024-25 Midcycle Budget Amendments Discussion

Staff and commissioners discussed the mid-cycle budget amendments, including:

- Inclusion of \$63.9M from Coliseum sale
- Two budget options presented to Council depending on receipt of Coliseum payment by September 1
- Emergency fiscal controls if payment not received
- Discussion of using one-time funds for ongoing expenses
- Review of BAC presentation to Council and its impact
- Recognition of commissioners' work on presentation

6. 2024 Work Plan Update and Ad Hoc Study Groups

The commission discussed:

- Need to revive ad hoc group activity for fall
- Community engagement group work on budget survey
- Economic development group preparing for department presentation
- Review of prior recommendations and action items

7. Agenda Items for Future Meetings

The commission agreed to:

- Cancel August meeting
- Schedule survey discussion for September
- Potentially schedule Economic & Workforce Development presentation for September
- Review BAC Council presentation recommendations at next meeting
- Plan for October leadership elections
- Continue Race & Equity follow-up discussions

8. Open Forum

No items presented.

9. Adjournment

The meeting was adjourned at approximately 7:01 PM.

These minutes were drafted using a large language model with a transcript of the meeting recording. They were reviewed and edited by a human for accuracy.

CITY OF OAKLAND

BUDGET ADVISORY COMMISSION

Meeting of the City of Oakland Budget Advisory Commission (BAC) held
Wednesday, September 11, 2024, at 6:00 PM.

The Budget Advisory Commission meeting was held in Hearing Room 2 in City Hall.

Commission Members:

Armand Bryan, Larisa Casillas, Mike Forbes, Guadalupe Garcia, Margaret Grimsley, Reisa Jaffe, Mike Petouhoff, Caitlin Prendiville, Sarah Price, Jane Yang, Stephisha Ycoy-Walton

City's Representative(s):

Nathan Bassett – Finance Department
Ashleigh Kanat – Economic & Workforce Development Department

Meeting Minutes:

1. Administrative Matters

- Present: Commissioners Bryan, Casillas, Garcia (arrived at 6:06 PM), Grimsley, Petouhoff, Prendiville, Price, Ycoy-Walton and City of Oakland staff members Economic and Workforce Development Director Kanat and Bassett
- Absent: Commissioners Jaffe, Yang
- Quorum was met with 7 members present for the duration of the meeting.
- The meeting was called to order by Chair Price at approximately 6:04 PM.

2. Approval of Prior Meeting Minutes

This item was moved to the next meeting.

3. Commissioners' Protocol

Commissioner Ycoy-Walton was welcomed to her first meeting following her appointment during the June City Council meeting.

Staff provided an update on commissioner recruitment and departures. It was noted that four vacancies currently exist, with three additional vacancies anticipated at the beginning of next month. The following positions are or will be vacant:

- One Mayoral appointment
- District 2 appointment (pending)
- District 3 appointment
- District 6 appointment
- Three council committee appointments

4. Finance Department Update

Staff reported that:

- Work continues on closing the previous fiscal year
- Period 12 closing of last year is expected to complete this week
- The next Revenue & Expenditure (R&E) report preparation will begin soon
- The city administrator has requested expedition of the R&E report
- Work has begun on the next biennial budget, with Phase 1 instructions sent to departments
- Departments have been asked to map positions, create org charts, and provide detailed breakdowns of position duties

5. Economic & Workforce Development Presentation

Director Ashleigh Kanat presented an overview of the Economic & Workforce Development Department, including:

- Department structure and staffing (45 FTE)
- \$35 million budget overview
- Division descriptions and responsibilities
- Economic development action plan framework
- Data tracking and metrics
- Current priorities and initiatives

Key discussion points included:

- Safety Ambassador Program impact and funding
- Cultural affairs and diversity initiatives
- Public-private partnerships
- Workforce development strategies
- Real estate asset management

6. Budget Survey Polling Discussion

The Commission discussed the upcoming required budget survey, including:

- Review of draft questions prepared by Commissioner Yang
- Discussion of survey methodology and timing
- Consideration of alternative approaches given current contract status
- Formation of backup plans using digital surveys if needed
- Agreement to continue discussion at the next meeting with more detailed review of questions

7. Ad Hoc Updates and Work Plan

Updates were provided on various ad hoc committees:

- Unhoused Ad Hoc Committee seeking new members
- Public Safety Ad Hoc Committee seeking new members
- Long-term Liability Ad Hoc Committee seeking new leadership
- Request made to review full work plan at next meeting

8. Future Agenda Items

The following items were requested for future meetings:

- Chamber of Commerce presentation
- Review of historical budget data
- Strategic plan update discussion
- Ad hoc committee framework review
- Elections for commission leadership positions

9. Adjournment

The meeting was adjourned at approximately 7:50 PM.

These minutes were drafted using a large language model with a transcript of the meeting recording. They were reviewed and edited by a human for accuracy.

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CITY OF OAKLAND

BUDGET ADVISORY COMMISSION

Meeting of the City of Oakland Budget Advisory Commission (BAC) held
Wednesday, November 13, 2024, at 6:00 PM.

The Budget Advisory Commission meeting was held in Hearing Room 2 in City Hall.

Commission Members:

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

City's Representative(s):

Brittany Hines & Nathan Bassett – Finance Department

Meeting Minutes:

1. Administrative Matters

- Present: Commissioners Bliss, Casillas, Forbes, Garcia, Grimsley, Petouhoff, Prendiville, Yang, Ycoy-Walton and City of Oakland staff members Assistant to the Finance Director Hines and Bassett
- Absent: Commissioner Bryan
- A quorum was established with nine out of ten commissioners present.
- The meeting was called to order by Vice Chair Casillas at approximately 6:05 PM.
- Vice Chair Casillas formally welcomed Commissioner Bliss, who joined the Commission recently.

2. Approval of Prior Meeting Minutes

Staff informed the Commission that prior meeting minutes remain pending due to capacity constraints. Minutes from April through September 2024 meetings will be presented at a future meeting.

3. Leadership Elections

The Commission conducted leadership elections for the positions of Chair, Vice Chair, and Finance & Management Committee Liaison.

Commissioner Forbes nominated Commissioner Jane Yang for Chair. Commissioner Yang nominated Commissioner Mike Forbes for Vice Chair and Commissioner Larisa Casillas for Finance & Management Committee Liaison.

With no other nominations received, the Commission proceeded with a ratification vote. All present commissioners voted in favor of the nominated slate ("aye"). The newly elected officers began their terms immediately:

- Chair: Commissioner Jane Yang
- Vice Chair: Commissioner Mike Forbes
- Finance & Management Committee Liaison: Commissioner Larisa Casillas

4. Commissioners' Protocol

Staff reported that there are currently six vacancies on the Commission. Commissioner Grimsley remains in holdover status awaiting reappointment by Council President Bas. Staff noted that several potential candidates have expressed interest, but new appointments may be delayed due to the pending mayoral transition.

5. Finance Department Update

Staff provided several critical updates:

- The Q1 Revenue & Expenditure report for FY25 will be reviewed at the Finance & Management Committee meeting on Tuesday, November 19, 2024, starting at 8:30 AM
- The contingency budget implementation is proceeding, with the budget survey now being conducted internally rather than through a third-party contractor
- The Budget Bureau is working on carry forward items and a budget amendment for the current year
- The last City Council meeting of the calendar year is scheduled for December 17, 2024

6. FY 2024 Q4 R&E Report

Staff presented an overview of the FY24 fourth quarter report, highlighting:

- GPF expenditures exceeded revenue by \$79.84 million (unaudited)
- Revenue were under budget by approximately \$129 million
- Expenditures were under budget by about \$50 million
- Real estate transfer tax was down by \$53 million
- Police Department overspent their budget by 8% (approximately \$26 million)
- The estimated available fund balance at the end of FY24 is negative \$71.66 million

Staff noted that for FY24-25, the city faces a precarious fiscal position due to:

- Negative fund balance from accumulated deficit
- Projected \$30 million overspending in the general purpose fund
- Implementation costs of the contingency budget
- Projected structural deficit of \$120 million per year in the upcoming biennial budget

7. Budget Survey Polling Discussion

The Commission discussed a revised approach to the budget survey given that it will now be conducted in-house by the Budget Advisory Commissioner rather than by a professional firm contracted by the City of Oakland. Key points included:

- Survey should be streamlined and focused on core priorities

- Staff recommended using Microsoft or Google Forms distributed through city communication channels
- Commissioners suggested a 1-5 scale on questions rather than 1-10 for clarity
- Survey results should help inform the FY25-27 biennial budget process
- The Community Engagement working group will continue refining the questions

Commissioners were asked to submit specific feedback on survey questions and suggested outreach partners to working group members by Wednesday, November 20, 2024 evening.

8. Ad Hoc Study Groups

The Commission established a new ad hoc committee to draft a response to the Q1 R&E report discussion at the November 19 Finance Committee meeting. Members include:

- Commissioner Mike Forbes
- Commissioner Mandela Bliss
- Commissioner Jane Yang

The Commission discussed possible collaboration with the Goldman School of Public Policy at UC Berkeley for research support. Interested ad hoc groups were asked to submit project proposals as soon as possible.

The Unhoused Ad Hoc group requested information about the Wood Street cleanup accounting and expenditures. Staff will investigate obtaining this information from the City Administrator's office.

9. Future Agenda Items

The following items were requested for future meetings:

- General Plan Update presentation from Planning Department
- Presentation from community organization of houseless residents
- Mayor's Commission on Aging presentation (proposed for after January)
- Form 700 filing information presentation from City Clerk's office
- Chamber of Commerce presentation
- Follow-up Economic Development Department presentation
- Review of budget survey results with community partners

10. Open Forum

Commissioners expressed appreciation for the newly elected leadership team.

11. Adjournment

The meeting adjourned at approximately 7:46 PM

These minutes were drafted using a large language model with a transcript of the meeting recording. They were reviewed and edited by a human for accuracy.

CITY OF OAKLAND

BUDGET ADVISORY COMMISSION

Meeting of the City of Oakland Budget Advisory Commission (BAC) held
Wednesday, December 11, 2024, at 6:00 PM.

The Budget Advisory Commission meeting was held in Hearing Room 2 in City Hall.

Commission Members:

Armand Bryan, Larisa Casillas, Mike Forbes, Guadalupe Garcia, Margaret Grimsley, Reisa Jaffe, Mike Petouhoff, Caitlin Prendiville, Sarah Price, Jane Yang, Stephisha Ycoy-Walton

City's Representative(s):

Nathan Bassett – Finance Department
Jestin Johnson – City Administrator's Office

Meeting Minutes:

1. ADMINISTRATIVE MATTERS

- Present: Commissioners Bliss, Bryan, Casillas, Forbes, Garcia (departed at approximately 7:00 PM), Grimsley (arrived at approximately 6:13 PM), Petouhoff, Prendiville, Yang, Ycoy-Walton and City of Oakland staff members City Administrator Johnson and Bassett
- Roll call was conducted with nine out of ten current commissioners present, establishing a quorum for the duration of the meeting. Commissioner Grimsley was noted as expected to arrive later via BART.
- Meeting called to order by Chair Yang at approximately 6:02 PM.

2. APPROVAL OF PRIOR MEETING MINUTES

Meeting minutes for April 10, 2024; May 23, 2024; June 6, 2024; July 10, 2024; September 11, 2024; and November 13, 2024 were postponed to the next meeting.

3. COMMISSIONERS' PROTOCOL

Staff reported one pending commissioner appointment awaiting processing, with potential delays due to the mayoral recall. Commissioner Prendiville announced their resignation from the Budget Advisory Commission after six years of service.

4. FINANCE DEPARTMENT UPDATE

Staff provided updates on:

- The December 9 City Council meeting discussing potential budget reductions
- Potential layoff of approximately 91 FTEs

- Options being considered including labor negotiations and use of emergency reserves
- Upcoming special City Council meeting on December 16 and regular meeting December 17
- Initial preparations beginning for the FY25-27 biennial budget

5. PUBLIC POLL OUTREACH

The Community Engagement Ad Hoc Committee presented plans for:

- Conducting a soft launch of the survey in December to test questions
- Full survey deployment in January
- Outreach through community organizations and council member networks
- Potential translation needs for multiple languages

Commissioner Ycoy-Walton moved to authorize the Community Engagement Ad Hoc Committee to finalize and launch the survey. Commissioner Grimsley seconded the motion. Motion passed unanimously with all commissioners present voting in favor.

6. BAC RESPONSE ON 2024-2025 Q1 R&E

Discussion of the draft letter focused on:

- Progressive revenue recommendations
- Partnerships with non-profits and private entities
- Labor negotiations considerations
- Pursuit of grants and loans

Commissioner Grimsley moved to authorize the Ad Hoc Committee to finalize and submit the letter on behalf of the full commission. Commissioner Ycoy-Walton seconded the motion. Motion passed unanimously with all commissioners present voting in favor.

7. DISCUSSION OF COUNCIL ACTION AT DECEMBER 9 MEETING

Staff provided overview of options presented to Council including:

- Layoff of 91 positions
- Fire station brownouts
- Labor negotiations
- Use of emergency reserves
- Unrestricting certain special funds

No final actions were taken at the meeting.

8. 2025-2026 CALENDAR YEAR STRATEGY DISCUSSION

The Commission reviewed and discussed:

- Calendar of required activities and deadlines
- Strategies for increased influence and effectiveness
- Approaches for providing specific recommendations
- Plans for engagement with new council members
- Role of ad hoc committees

9. AGENDA ITEMS FOR FUTURE MEETINGS

January meeting to include:

- Ethics presentation
- Planning Department presentation

February meeting considerations:

- Housing/unhoused services presentations
- Police Department audit review if available

10. OPEN FORUM

No items presented

11. ADJOURNMENT

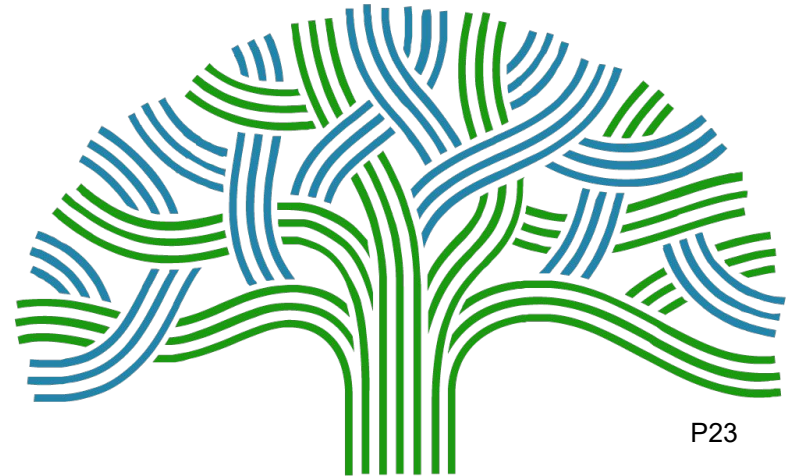
Meeting adjourned at approximately 8:04 PM

These minutes were drafted using a large language model using a transcript of the meeting recording. They were reviewed and edited by a human for accuracy.

DRAFT

BAC 2025 Strategy

Oakland, CA | January 11, 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 and Relationships

Actions

- Fill six vacant positions
 - Look for people who are committed to 'doing the work' to improve life in Oakland
 - Seek members with lived experiences to share
 - Skills in engagement, finance, legal, labor, analytics welcome
- Develop stronger working relationship with City Council
- Enhance 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
- Focus on engagement, the unhoused, public safety, and economic development through ad hoc groups

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

How We Work

Inclusive
Fact-based
Collaborative

P24

2025 City of Oakland Resident Budget Priorities Survey

Fielded and presented by the Budget Advisory Commission
February X, 2025



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Key Takeaways

Context

Motivation & Methodology Highlights

Motivation

- Background
 - The survey is mandated by the City's Coordinated Fiscal Policy
 - The survey started in 2000 and has been conducted roughly bi-annually since 2015
- Goals
 - Provide the Mayor and City Council an assessment of community satisfaction, concerns, and priorities to inform the next budget
 - The survey is intended to cover Oakland's diverse population
- Design Objectives
 - Get *useful* information
 - Prompt hard decisions
 - Longitudinal questions

Given the budget crisis this survey is particularly important as the City must make difficult decisions. Money does not exist to fund everything!

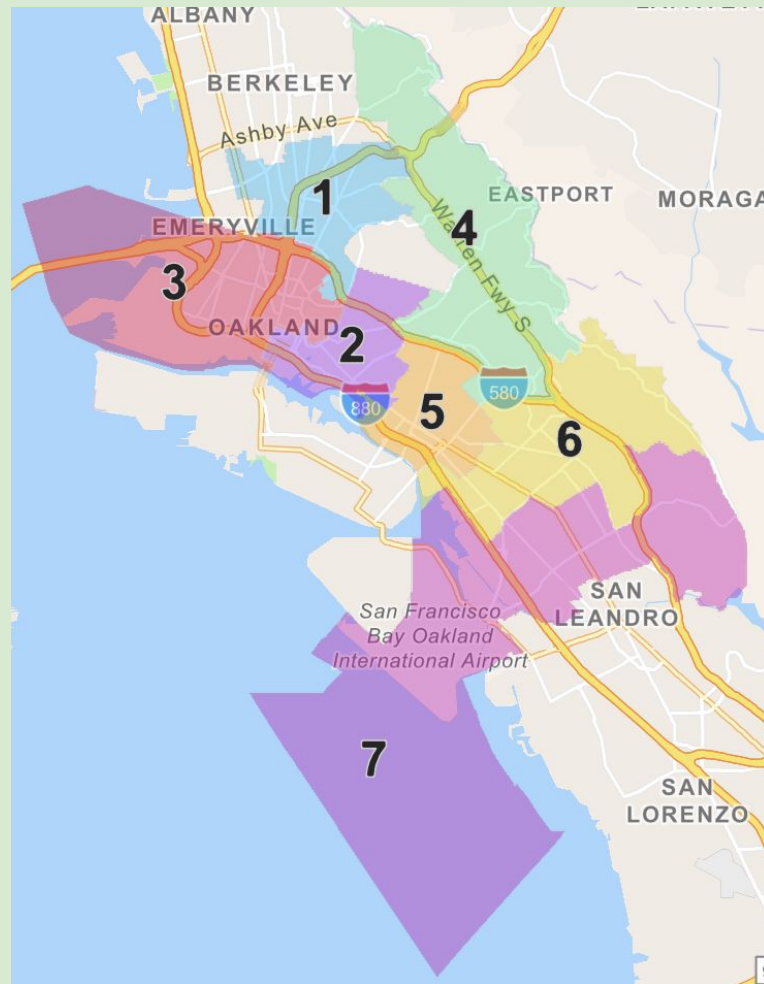
Methodology Highlights

- Due to budget constraints no funding was available for an outside consultant, so BAC members created and fielded the survey as volunteers
- Survey fielding
 - Survey was administered online and through in-person 'clipboard' collection
 - English, Spanish, and Chinese surveys
 - Received input from other cities on how to best structure a citizen surveys
 - BAC members collaborated with City departments and over 75 community organizations to increase reach across the Oakland community
- Survey reach
 - 6,735 people living in Oakland responded
 - IFor comparison, the last survey fielded 1,270 respondents
- Analysis methods
 - Weighting to account for data bias due to self-selection / disproportionate representation of some populations
 - This occurred with prior surveys as well
 - Sometimes percents add up to a 101 or 99 due to rounding error
 - **TODO:** add margin of error with 95% confidence interval

Results

Overall and by-district

Overall City of Oakland

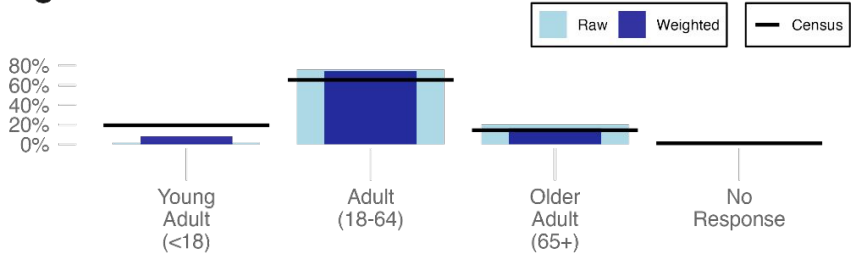


Survey Respondent Demographics

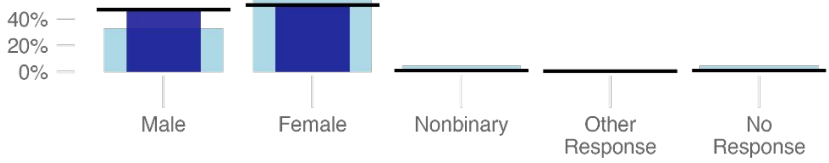
District



Age



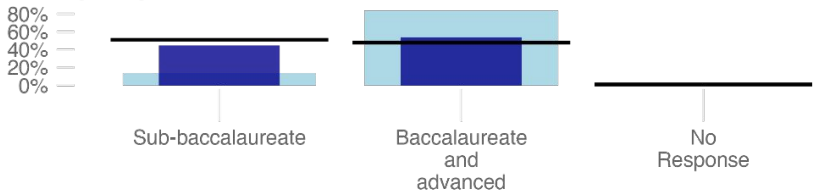
Gender



Race/Ethnicity



Education



The survey results included in this presentation use weighted responses

Q2: Generally speaking, how would you rate Oakland as a place to live?

Year	2000	2002	2005	2015	2017	2018	2020-21	2022-23	2025
Excellent	18%	19%	19%	26%	27%	16%	13%	10%	4%
Good	47	45	42	44	43	48	46	44	34
Fair	28	27	30	22	21	27	26	30	39
Poor	6	8	8	9	8	8	14	15	23

TODO: change presentation from table to alluvial + small multiples by segment (Length of residency in Oakland, Racial/ethnic identity Gender, Education)

Note to Jane: attached prior year results. Note that prior surveys highlighted % 'excellent / good'

Q3: Do you **approve or disapprove of the overall job being done by Oakland City government** in providing services to the people who live here?

Year	2000	2002	2005	2015	2017	2018	2020-21	2022-23	2025
Strongly Approve	4%	5%	3%	4%	4%	1%	6%	3%	2%
Somewhat Approve	30	35	28	28	31	23	35	27	20
Somewhat Disapprove	49	42	49	44	41	50	24	29	37
Strongly Disapprove	13	14	18	18	20	22	27	34	42
Don't know	4	4	2	6	4	4	8	7	N/A

TODO: change presentation from table to alluvial + small multiples by segment (Length of residency in Oakland, Racial/ethnic identity Gender, Education)

Note to Jane: attached prior year results. Note that prior surveys highlighted % 'excellent / good'
Also, before 2018 the scale was excellent, good, only fair, poor

PRE-DECISIONAL DRAFT FOR DISCUSSION

Q2 x Q3

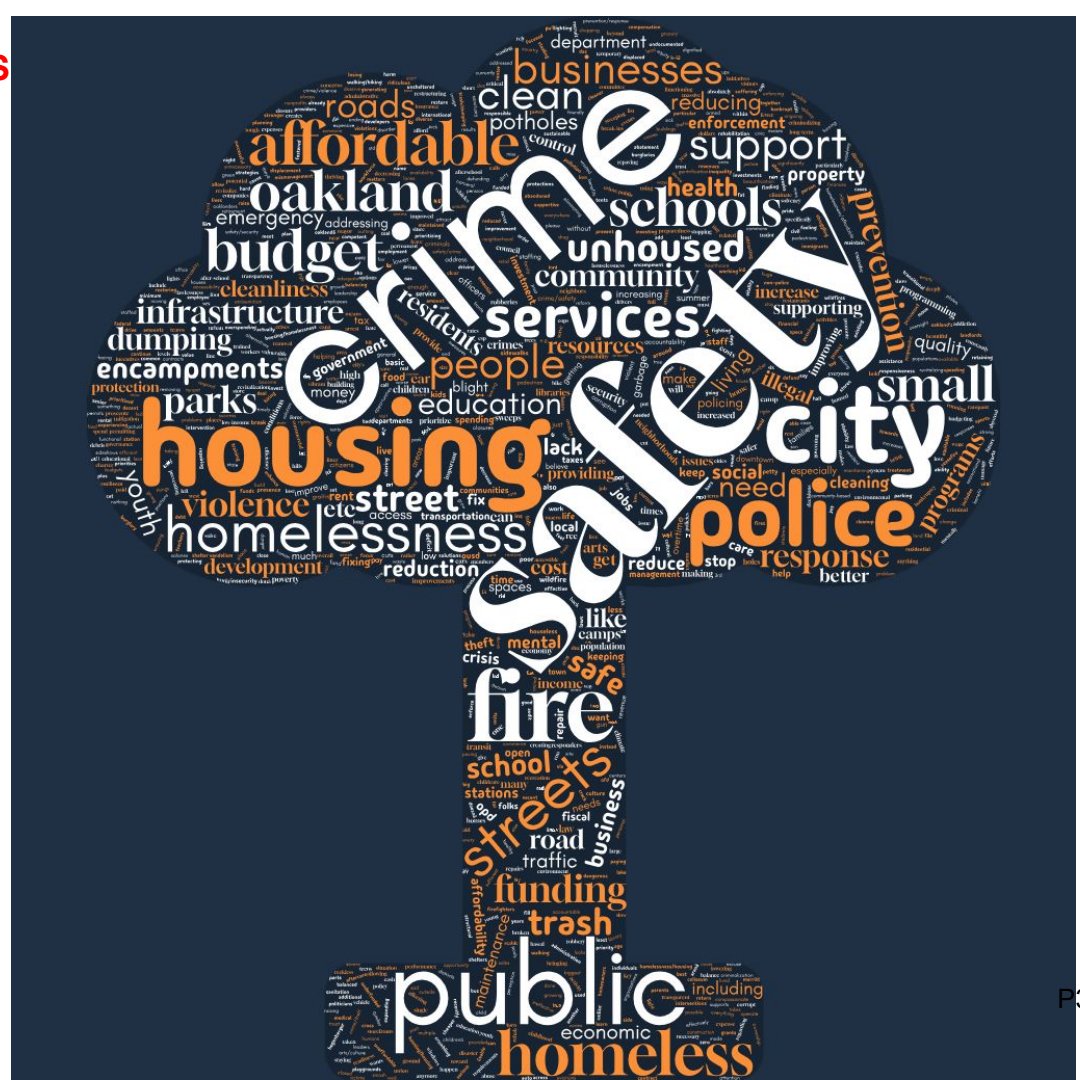
TODO: Crosstab heat map to understand relationship between people who think Oakland is Excellent/Good place to live and Approve/Disapprove of City Government

PRE-DECISIONAL DRAFT FOR DISCUS

Q4: In the next two years, what are the two most important issues facing the city?

Top Word Themes:

- Crime - 1,907
- Safety - 1,804
- Housing - 1,200
- Public - 1,038
- Homelessness - 910
- Police - 722
- Fire - 572

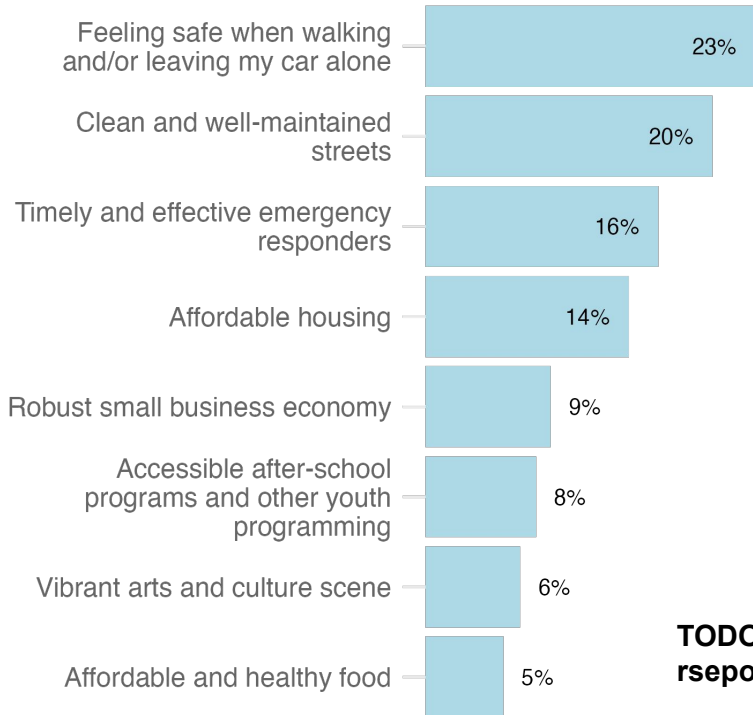


Q4 Sample Quotes and Notes

Word	Themes / Sample Quotes
Crime	“Drastically stricter enforcement of public safety. Aggressively pursue criminals that execute crimes that make Oakland unsafe, expensive to live in, or erode the basics of a decent quality of life. This includes not just violent crimes, but also personal (home, auto, etc) and business theft, even petty in magnitude, sideshows, graffiti, trash, open use of drugs. Hard stop to all of it, with zero tolerance. Empower OPD and CHP to enforce aggressively. The message needs to be clear to criminals that crime will not be tolerated in Oakland. Then hopefully people will want to visit oakland, live in oakland and run businesses in Oakland.”
Safety	“Safety for all residents and visitors (e.g., decreasing crime without violating people or using excessive force, helping those with mental health and drug issues attain care and support); improvements to the infrastructure and supports (e.g., supporting homeless people, fixing streets).”
Housing	“I would like to see the city of Oakland prioritize affordable housing and homelessness as well as public safety and violence prevention measures. Addressing the housing crisis is critical, with funding for affordable housing initiatives needed in the coming years, as well as for services for the homeless, including shelters, transitional housing, and mental health support.”
Public	Almost exclusively used next to safety.
Homelessness	Frequently mentioned with crime / safety. “Crime and homelessness.” Fighting crime/perceptions of public safety and tackling homelessness/encampments/litter
Police	Themes were around more police, a more visible presence, and better response times 7 responses with request to defund the police, 6 asking to reduce presence

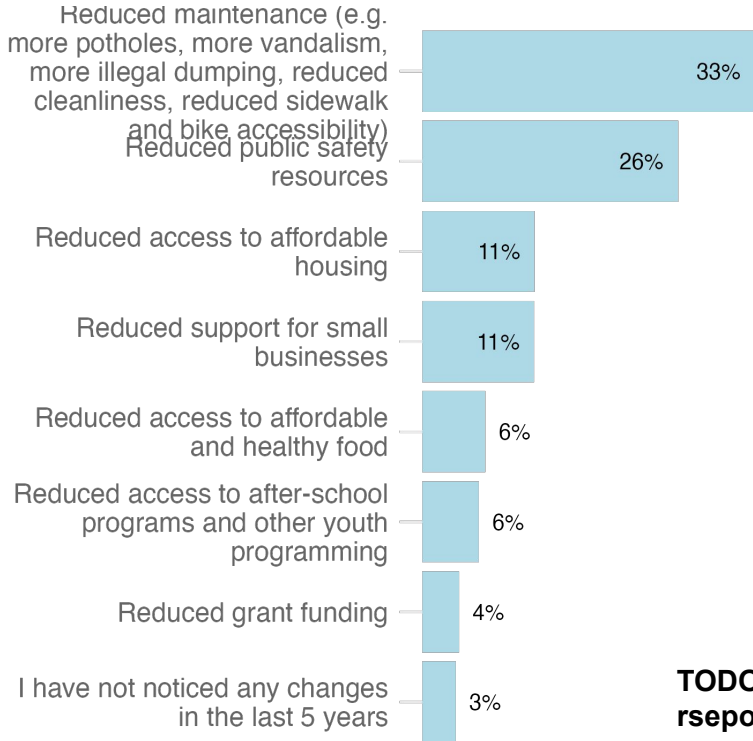
Q5: Which of the following are most important to you to make Oakland a place you are happy to call home?

Choose up to 3



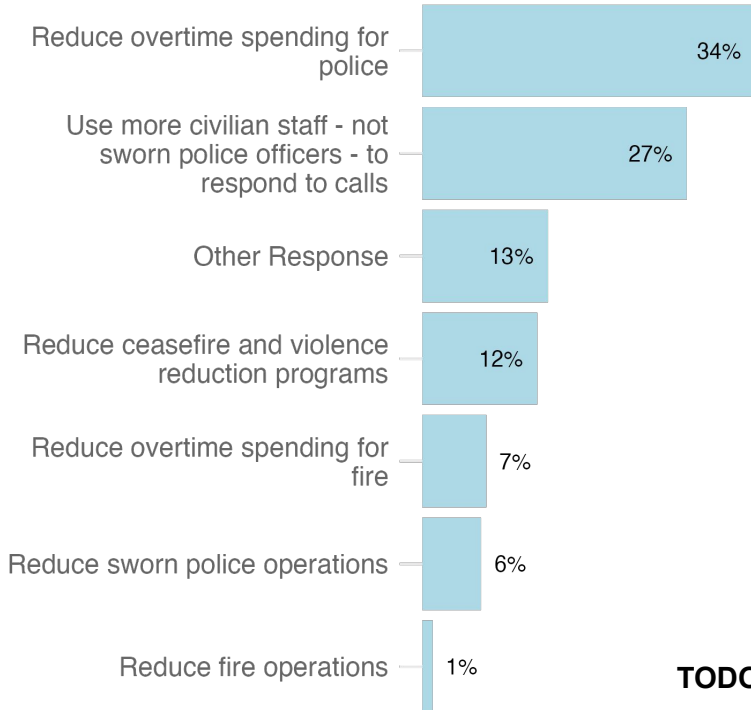
TODO: Because of multiple choice, these %s are of **selections** instead of **rsepondents**. Consider which makes more intuitive sense to present.

Q6: In the last 5 years, how has Oakland's budget most impacted your household and work? *Choose up to 3*



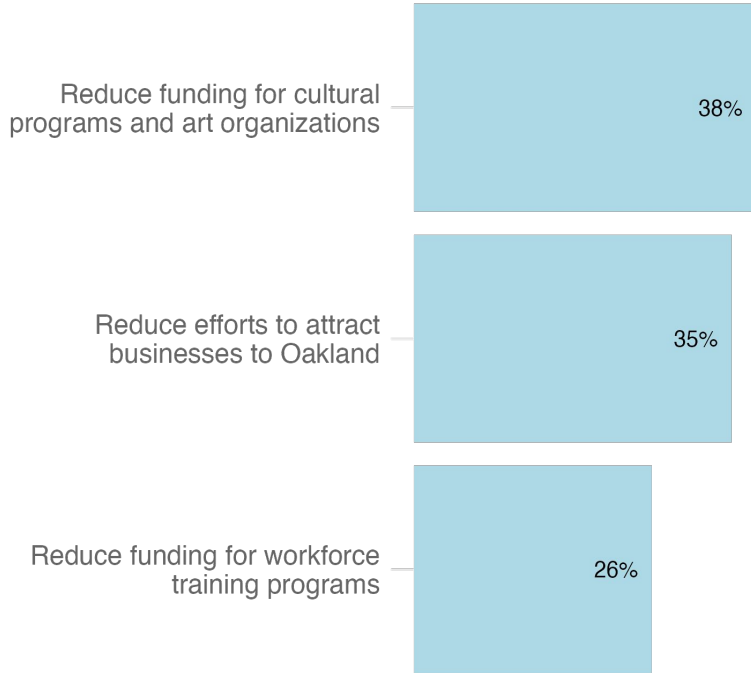
TODO: Because of multiple choice, these %s are of **selections** instead of **rrespondents**. Consider which makes more intuitive sense to present.

Q7: For public safety, which of the following would you support reducing funding?

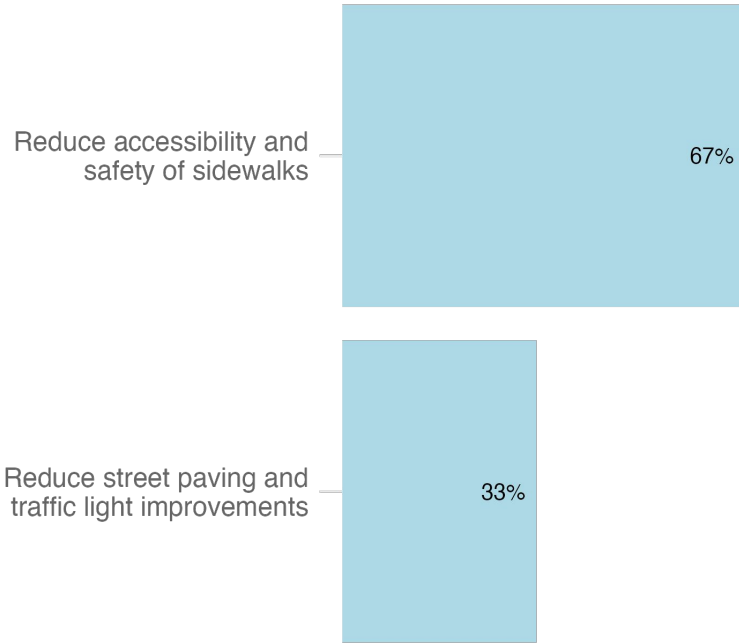


TODO: pull out summaries of Other Responses

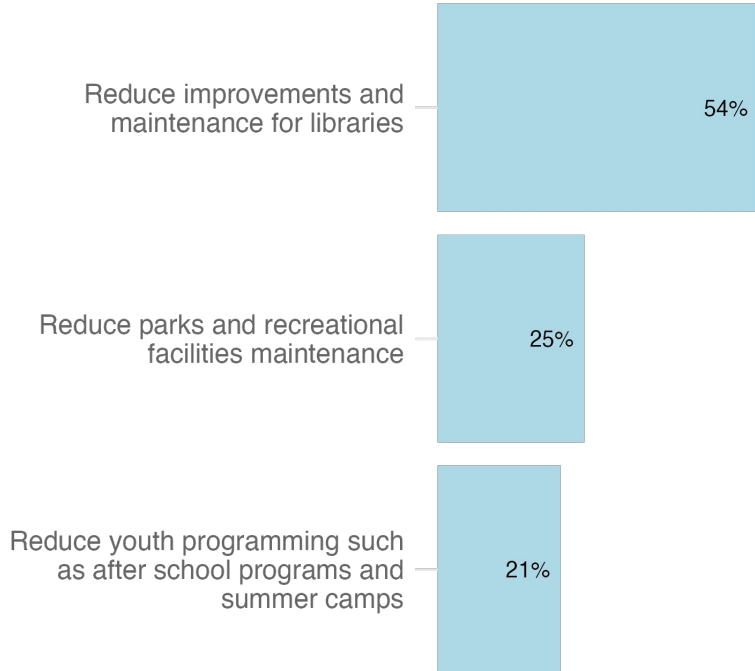
Q8: For economic growth...which of the following would you support reducing funding?



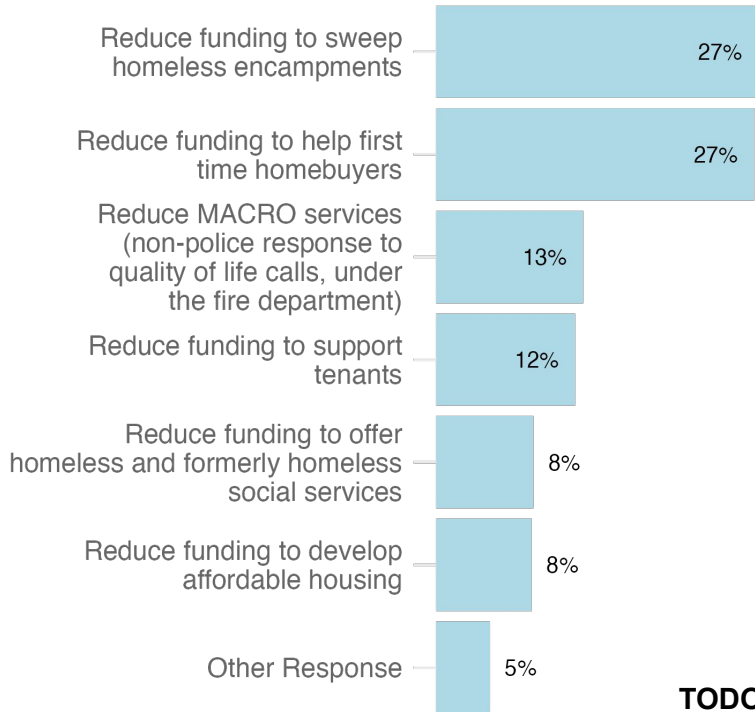
Q9: For transportation...which of the following would you support reducing funding?



Q10: For youth and community investments... which of the following would you support reducing funding?



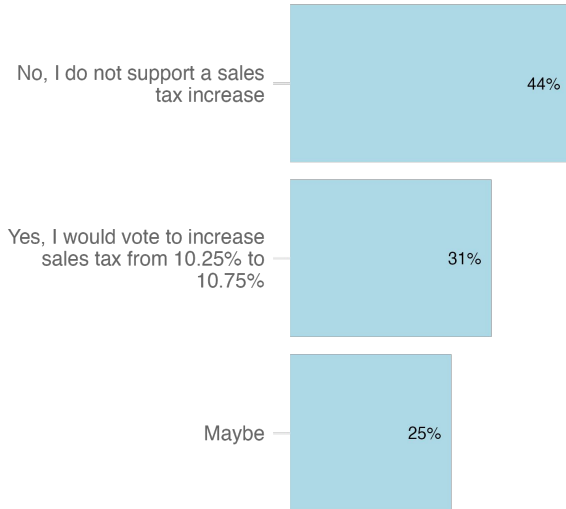
Q11: For housing and homelessness investments...which of the following would you support reducing funding?



TODO: pull out summaries of Other Responses

Q12: Sales Tax

On the April 15 special election, you will be asked to vote on an increase on sales tax in Oakland from 10.25% to 10.75%. That's an extra 50 cents on a \$100 purchase. This sales tax increase is expected to raise \$20-\$30M/year for the City of Oakland. Would you vote in support of this sales tax increase?



PRE-DECISIONAL DRAFT FOR DISCUSSION

Q13: What are other ways that the City could reduce expenses or increase revenues?

Top Word Themes:

- Police - 1,033
- Tax - 793
- People - 537
- Money - 504
- Business - 502
- Cut - 502



Q13 Sample Quotes and Notes

Word	Themes / Sample Quotes
Police	<p>Themes: Almost 100 comments about reducing police overtime “Improve parking law enforcement. Increase police enforcement of traffic laws, fix it tickets, permit and street cleaning enforcement. The city does a poor job of enforcing existing revenue screens. I have never gotten a parking ticket in Oakland.”</p>
Tax	<p>Over 60 comments about adding progressive taxes. “Make business tax rates progressive, progressive property transfer tax rates for high-value properties, introduce progressive-rate city income tax for those working in Oakland” “City Council needs to make sure that taxes are collected and that departments that function to collect revenue and taxes are actually doing that before asking residents for more money.”</p>
People	
Money	
Business	<p>“Get out of the way of business - make it easier to open businesses or build housing by streamlining and reducing permits to the bare minimum for health and safety. Listen to businesses and make reforms that will help them stay in business and generate tax revenue for the city” “Many businesses have left due to crime. People are afraid to come spend money in Oakland because of crime. Oakland offers so much but it needs to be safe before people and businesses will spend money here.”</p>
Cut	<p>Themes: MACRO, city management numbers / salaries, and police funding especially around overtime “Cut out all spending increases that came from federal COVID funds. Reverse all salary increases going back to 2020. Restructure pension programs so that it is defined contribution.”</p>

District 1

Golden Gate

Idora Park

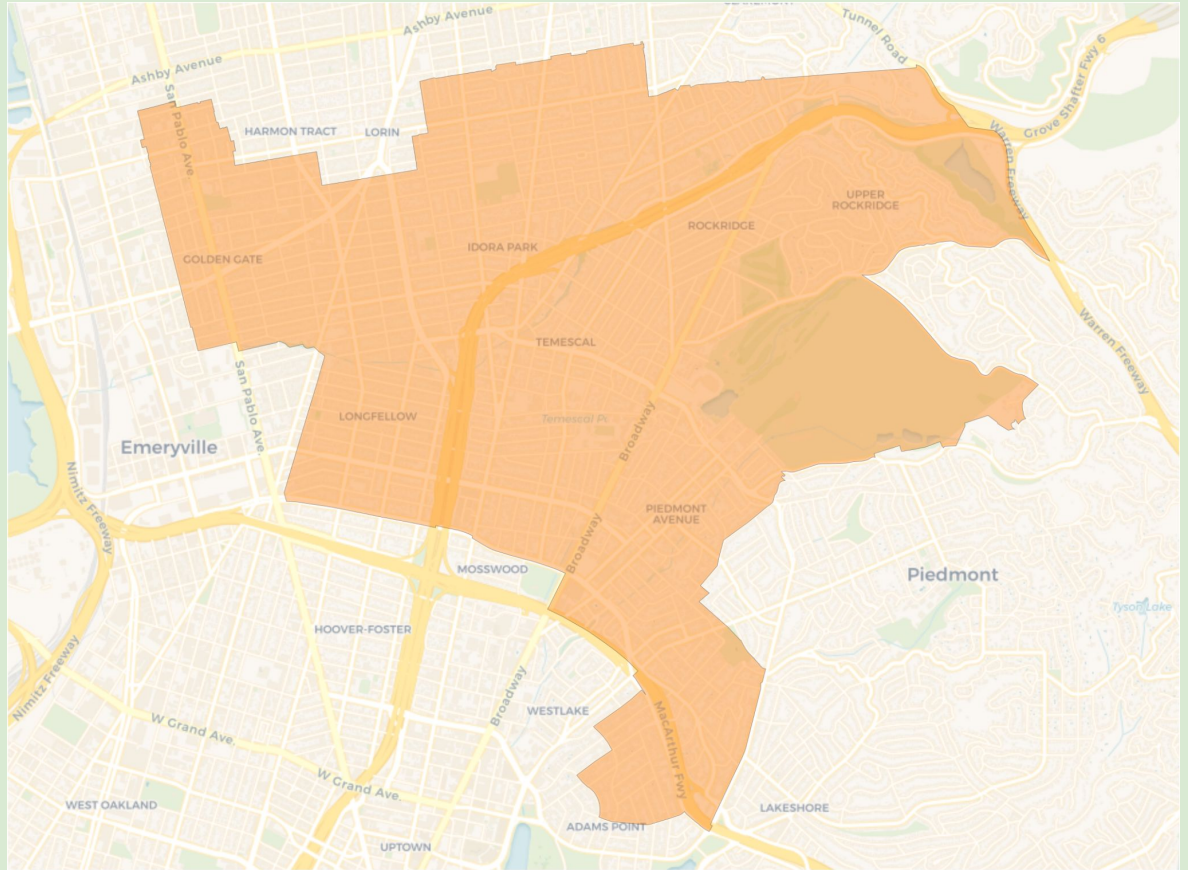
Rockridge

Upper Rockridge

Longfellow

Temescal

Piedmont Avenue



District 2

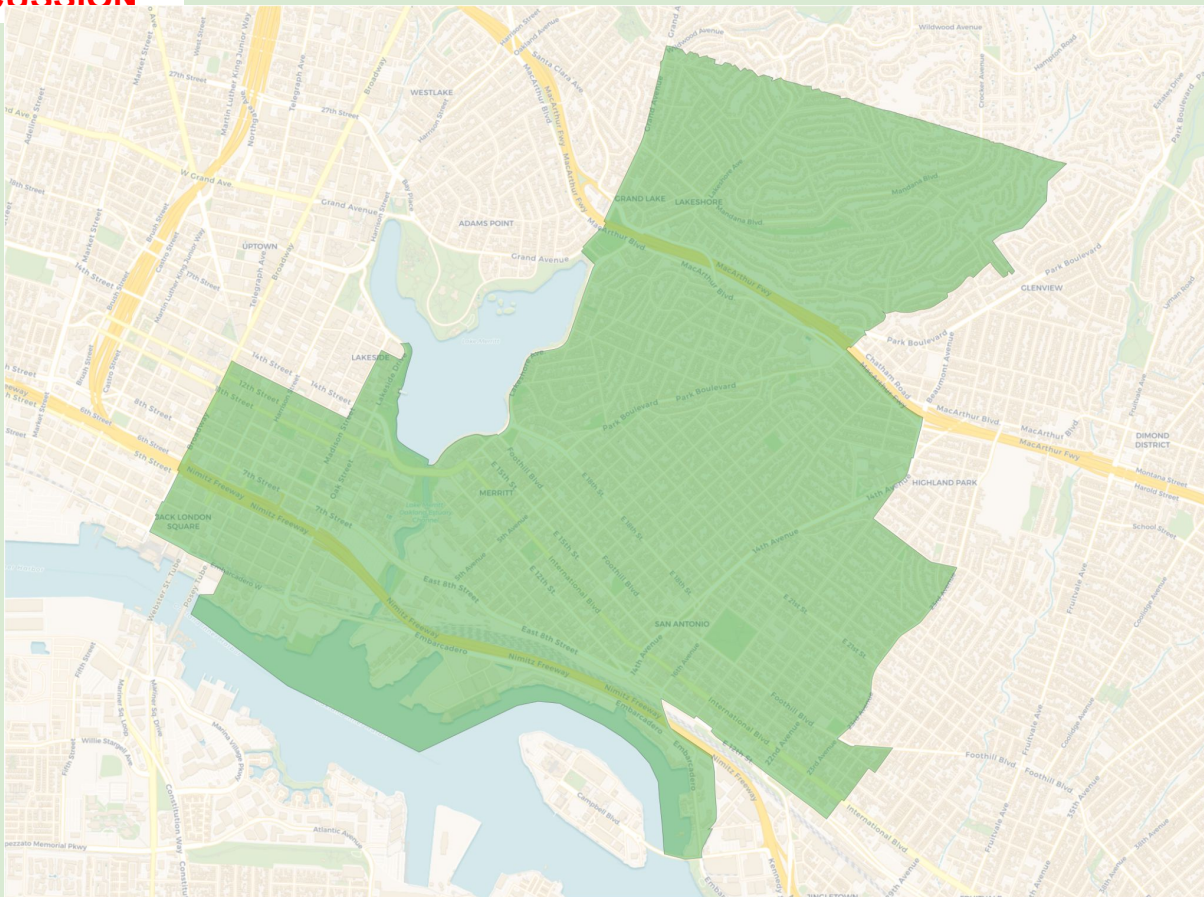
Grand Lake

Lakeshore

Lake Merritt

Jack London Square

San Antonio



District 3

Mosswood

Hoover Foster

Westlake

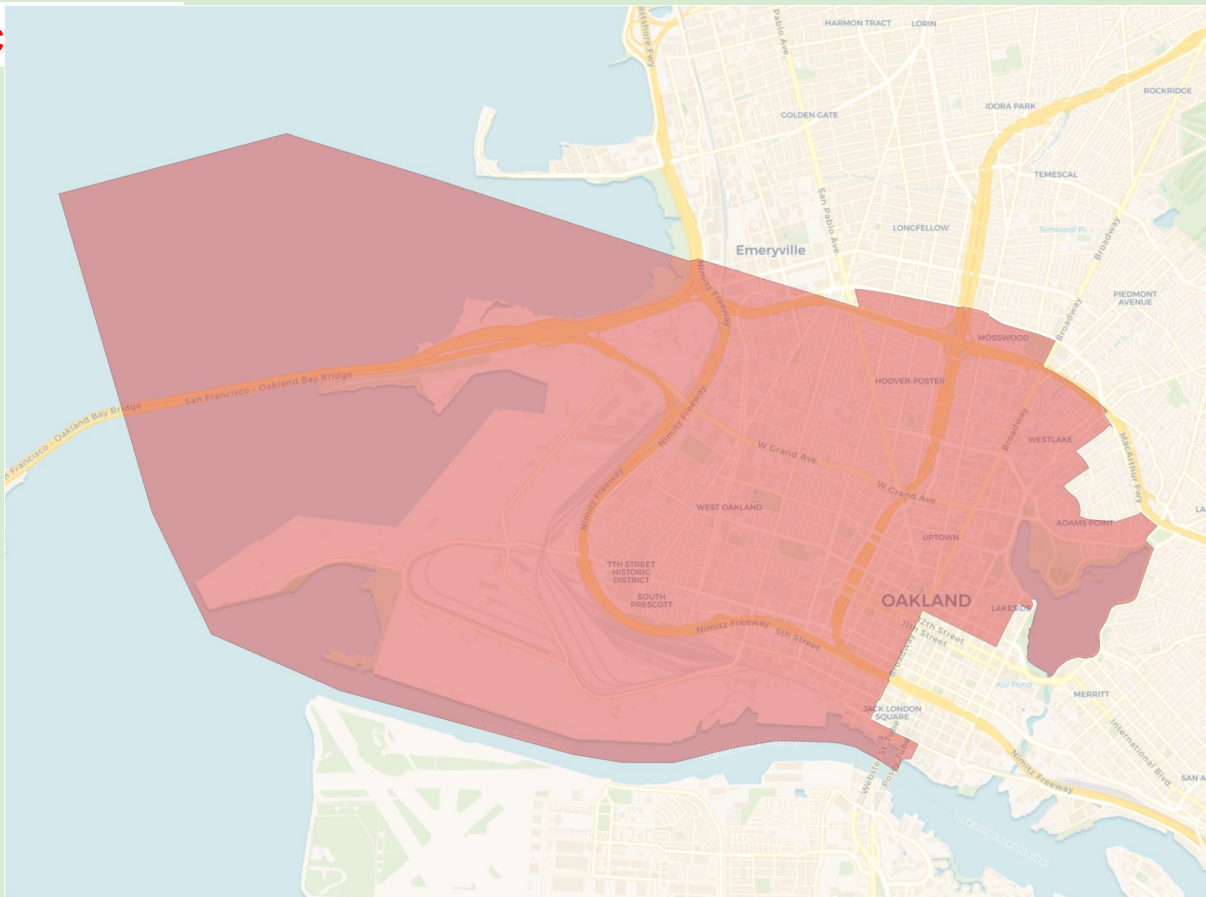
Adams Point

West Oakland

Uptown

7th Street Historic District

South Prescott



District 4

Laurel

Dimond

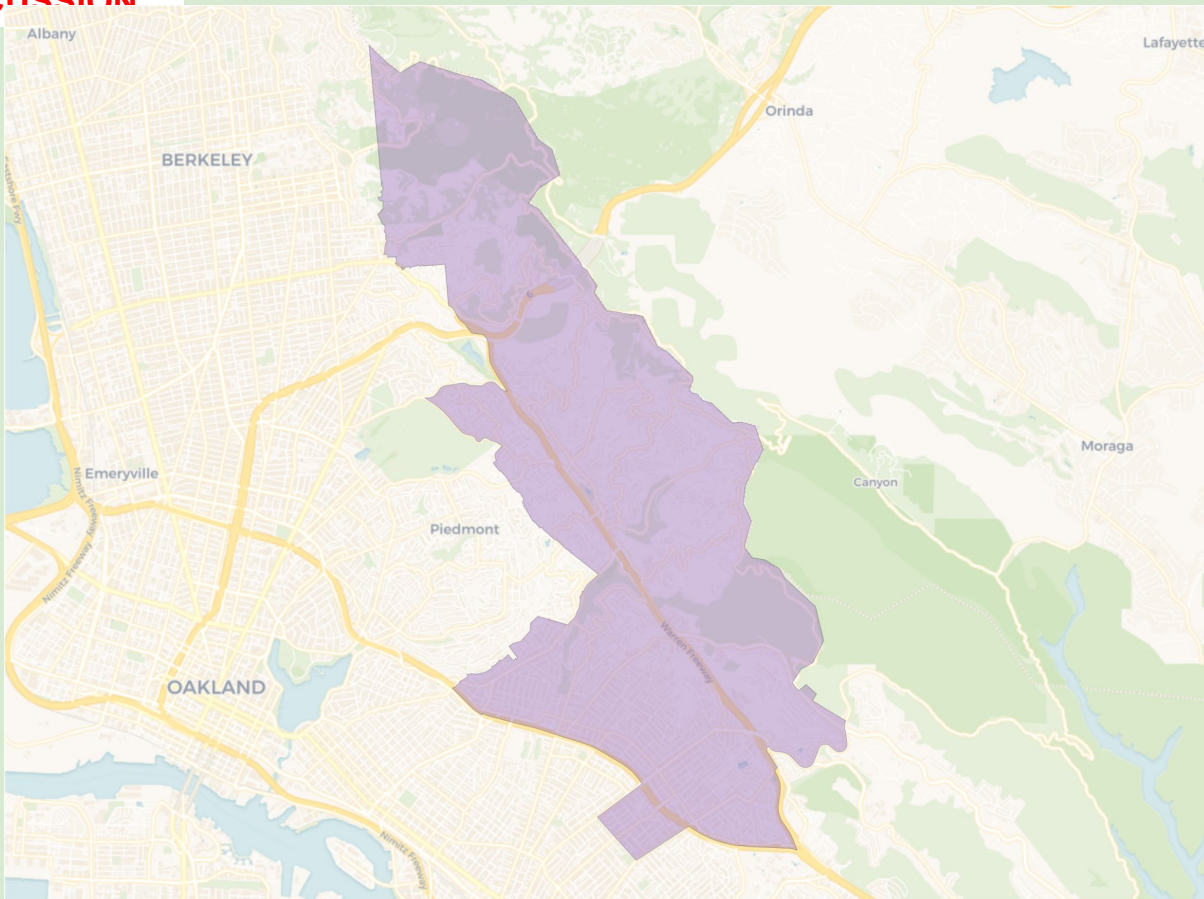
Allendale

Glenview

Montclair

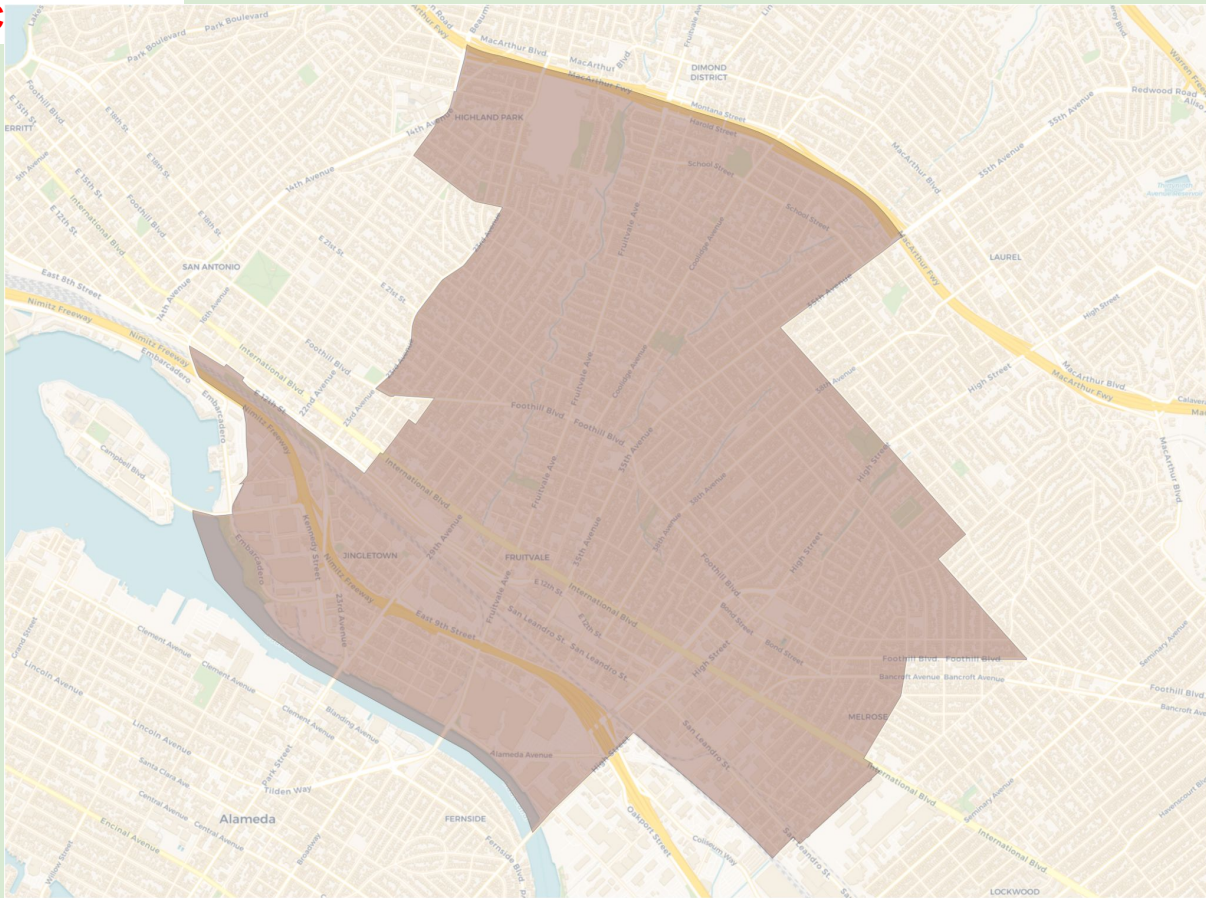
Redwood Heights

North Hills



District 5

Highland Park
Fruitvale
Jingletown

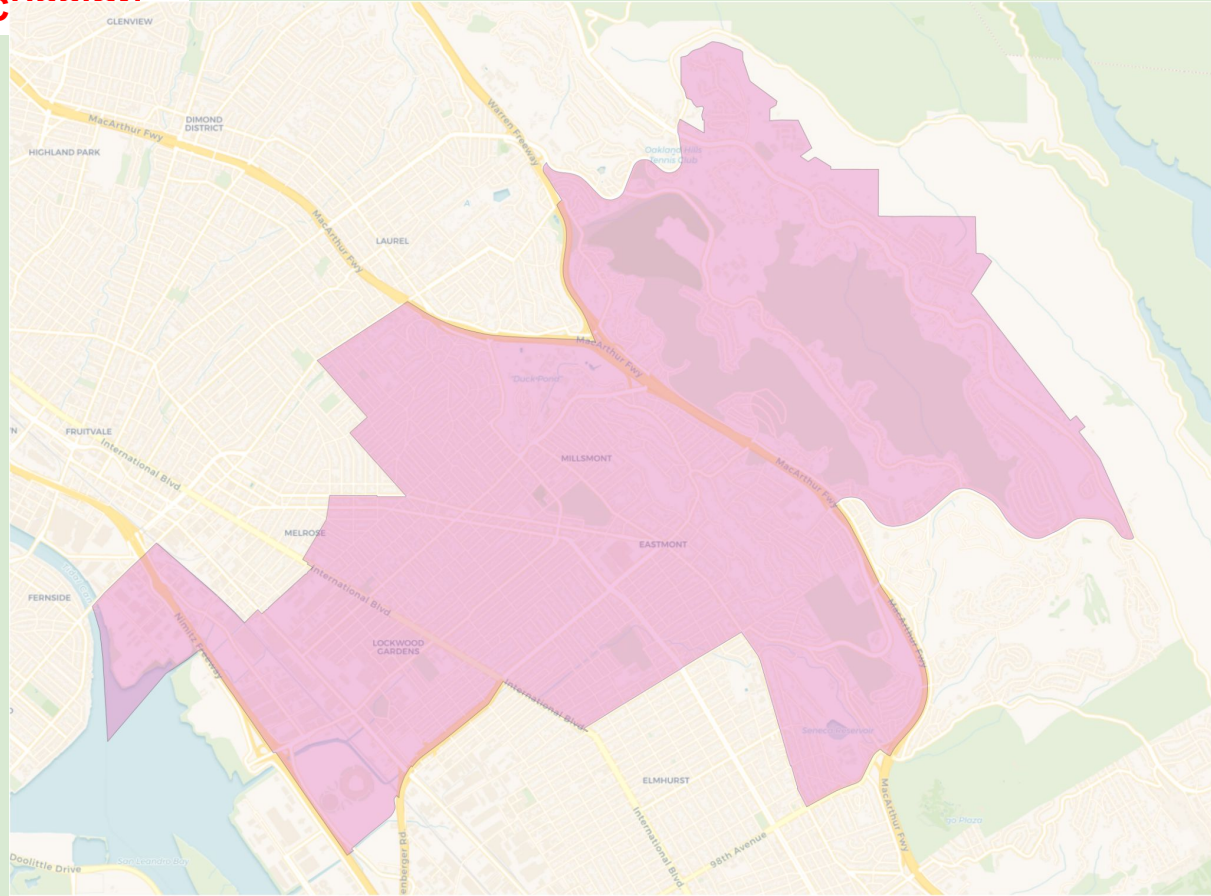


District 6

Millsmont

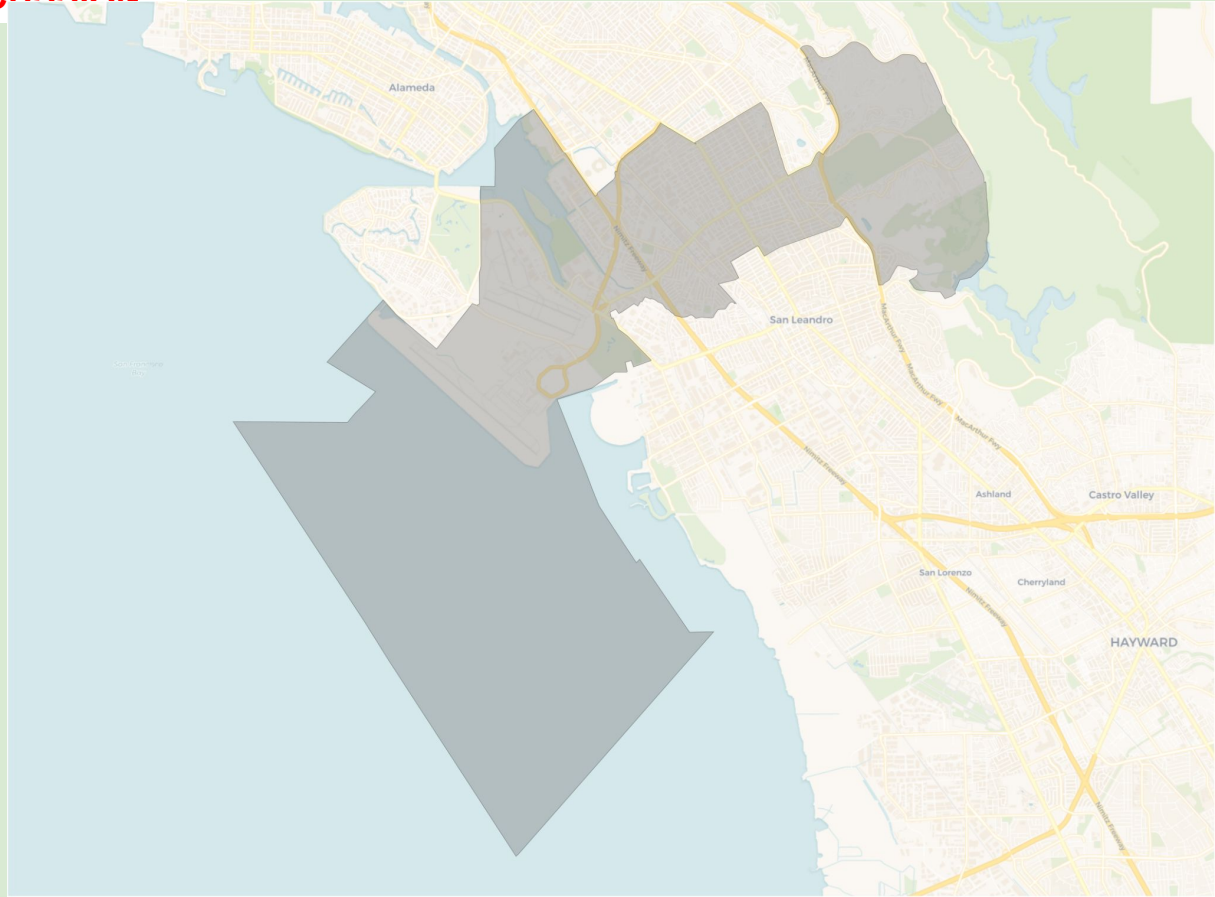
Eastmont

Lockwood Gardens



District 7

Deep East Oakland



Youth

Respondents 0-17 years

Older Adults

Respondents 65 and older

Unhoused

Collected in-person

Deep Dive Opportunities

Topics for further research and public education

Survey results suggest value in increasing public (and Council) awareness of X, Y, and Z

- Recurring comments that are low-ROI options
- Ideas that merit more investigation

Methodology

Survey design, community outreach, and analysis

Survey design

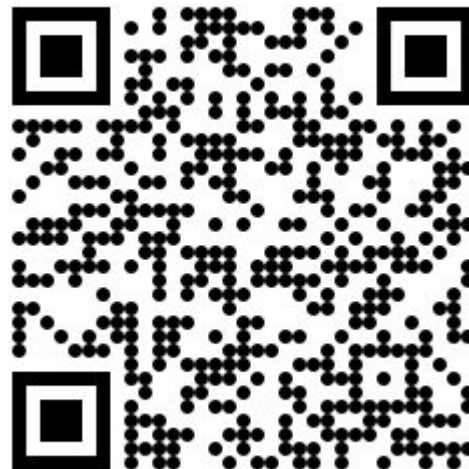
- Links to surveys in all languages
- Intentions behind ways questions were phrased
 - Resident-centric, rather than department-centric
 - Force hard choices
 - Don't assume too much knowledge about budget

Community engagement

- Summary of outreach channels

Analysis

- Post-stratification motivation
- [Link to code repository](#)



Past Budget Priority Surveys

FY X, Y, Z

Past Budget Priority Survey Reports

- Hyperlinks XX