

CITY OF OAKLAND

BUDGET ADVISORY COMMISSION

Notice is hereby given that a **regular meeting** of the City of Oakland Budget Advisory Commission (BAC) is scheduled for **Wednesday, September 12, 2018 at 6:00 pm** In the **Hearing Room 4, City Hall, 2nd Floor**, at 1 Frank Ogawa Plaza.

Commission Members:

Lori Andrus, Brandon Baranco, Jon Bauer, Ken Benson, Margurite Fuller, Ed Gerber, Alicia John-Baptiste, Geoffrey Johnson, Darin Ranahan, Noelle Simmons, Adam Van de Water, Danny Wan, & Jennifer West

City's Representative:

Brad Johnson – *Finance Department*

Meeting Agenda:

1. Administrative Matters
 - A. Welcome & Attendance
2. Informational Presentation regarding proposed updates to the CIP prioritization process, see attached materials. [20 minutes]
3. Discussion regarding Negative Funds Balances, see attached materials. [40 minutes]
4. Initial discussion regarding the Budget priorities poll for the FY 2019-21 biennial budget cycle, election, see attached materials that include: [60 minutes]
 - A. Consolidated Fiscal Policy
 - B. FY 2017-19 Final Public Poll Survey Instrument
 - C. FY 2017-19 Public Poll Presentation
5. Open Forum
6. Discussion of Next Meeting Dates and Subjects
 - A. Date Options: September 26, October 3, October 12, October 17, October 24, October 31
 - B. Subjects: Budget Priorities Poll, OPEB Grand Jury Response & City Report
7. Adjournment

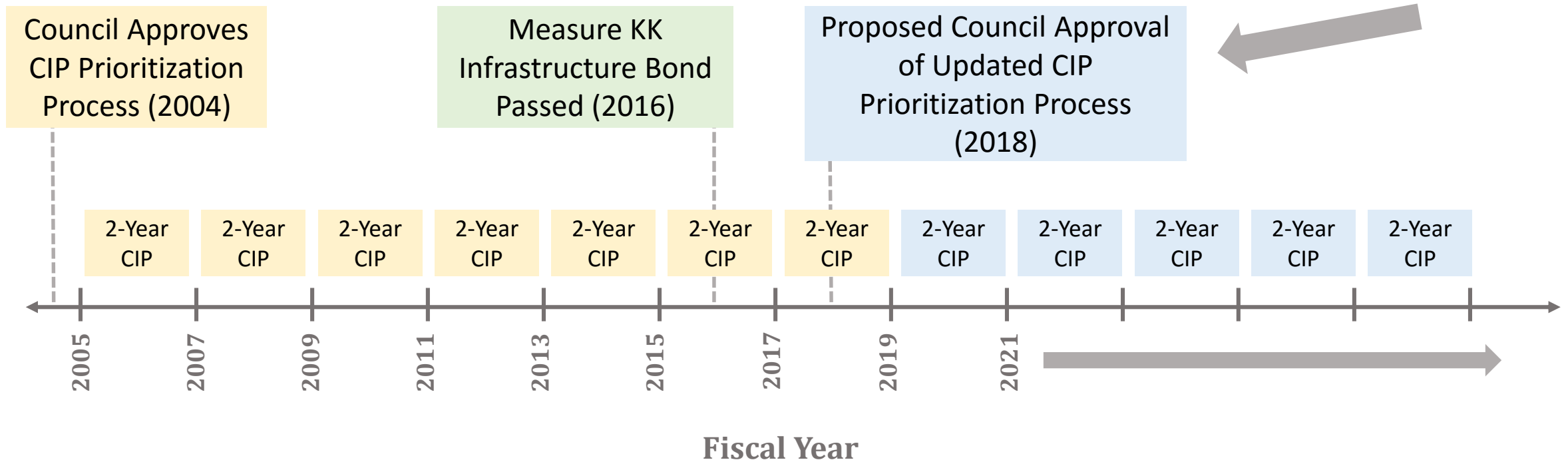
Oakland's Capital Improvement Program (CIP) Prioritization Process Update

Presented by:

OakDOT
Oakland Public Works Department

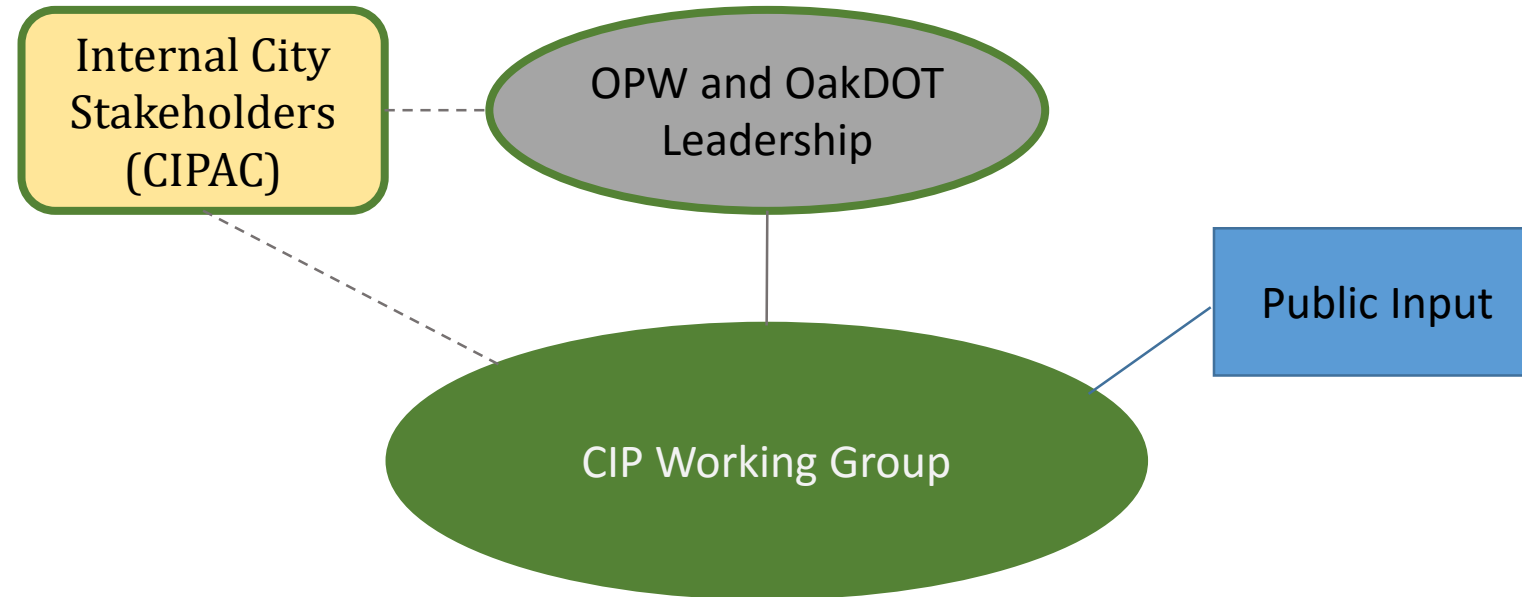
September 12, 2018

The prioritization of the Capital Improvement Program (CIP) is based on 2004 legislation



This Citywide effort was led by OPW and OakDOT

Internal Organization Structure



Externally, the Project included a public engagement process during June 2018

A strong process prioritizes capital needs based on Oakland's values

Mayor and
Council Priorities

General Plan and
Specific Plans

Other Council
Adopted Plans

Departmental
Strategic Plans

Measure KK
Guiding Principles

Public Input

Shared Values

Citywide Capital Prioritization Factors

Asset Specific Sub-Factors +
Performance Metrics



City of
Oakland

Project Mission Statement

The City of Oakland's Capital Improvement Program (CIP) reflects citywide priorities of Safety, Equity, Resiliency and Sustainability, Infrastructure Investment, Community Investment and Engagement, Economic Prosperity, Quality and Vibrancy of Life, and Transparency.

The CIP defines the prioritization strategy and financial plan to implement capital projects that maintain, improve, and build the City's valuable assets to serve Oakland's diverse economic, educational, and recreational needs.



CAPITAL IMPROVEMENT PROGRAM 101: ASSETS



Parks
and
Open Space



Streets/Sidewalks/
Signal Lights and
Transportation



Building
and
Facilities



Sanitary
Sewer



Drainage
and
Watershed



Technology

FACTORS FOR CONSIDERATION



Equity



Health &
Safety



Environment



Economy



Collaboration



Shovel Ready



Required Work



Existing Conditions

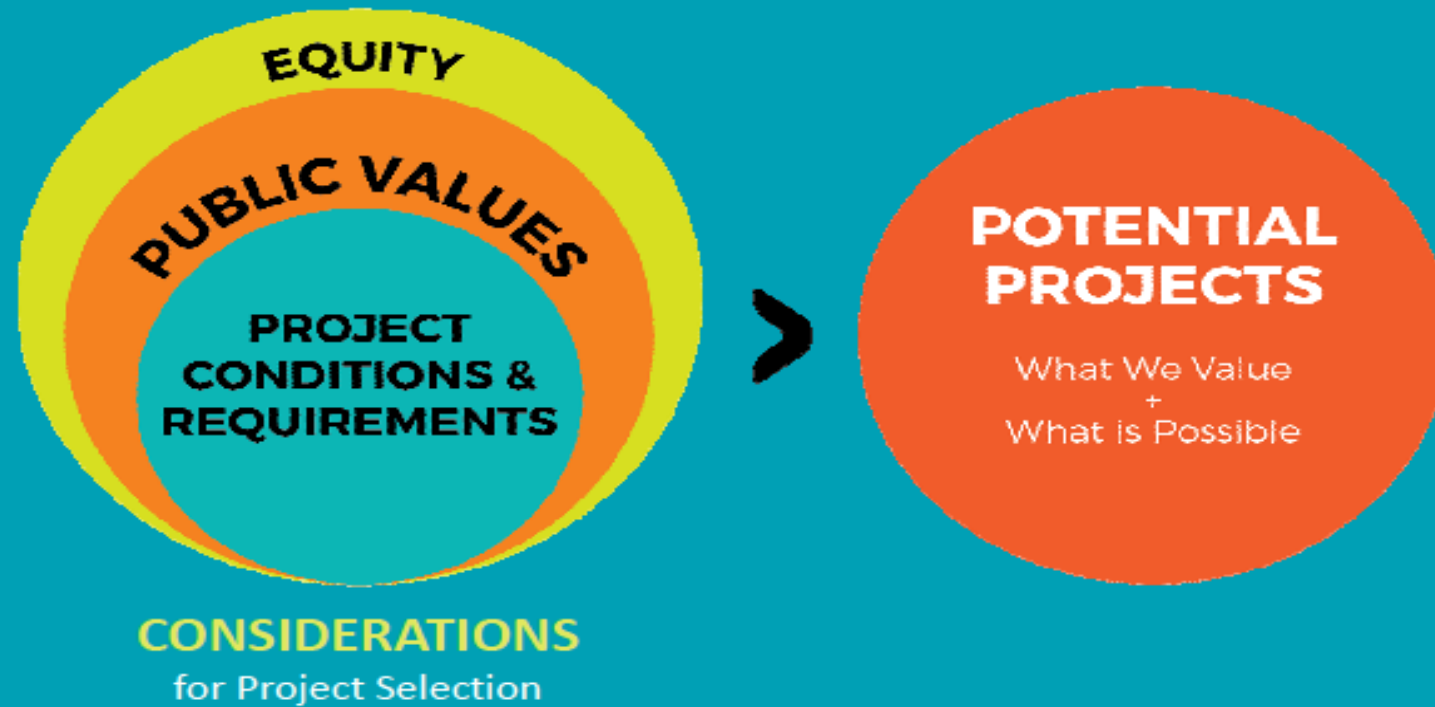


Improvement



City of
Oakland

HELP US MAKE SURE
COMMUNITY VALUES & PRIORITIES
ARE REFLECTED IN THE
CAPITAL IMPROVEMENT PROGRAM!



Public Outreach Objectives

Through the outreach, the CIP team hoped to introduce a new approach of evaluating proposed CIP projects to the greater Oakland Community and to shift the paradigm of how previous CIP projects were prioritized and implemented.

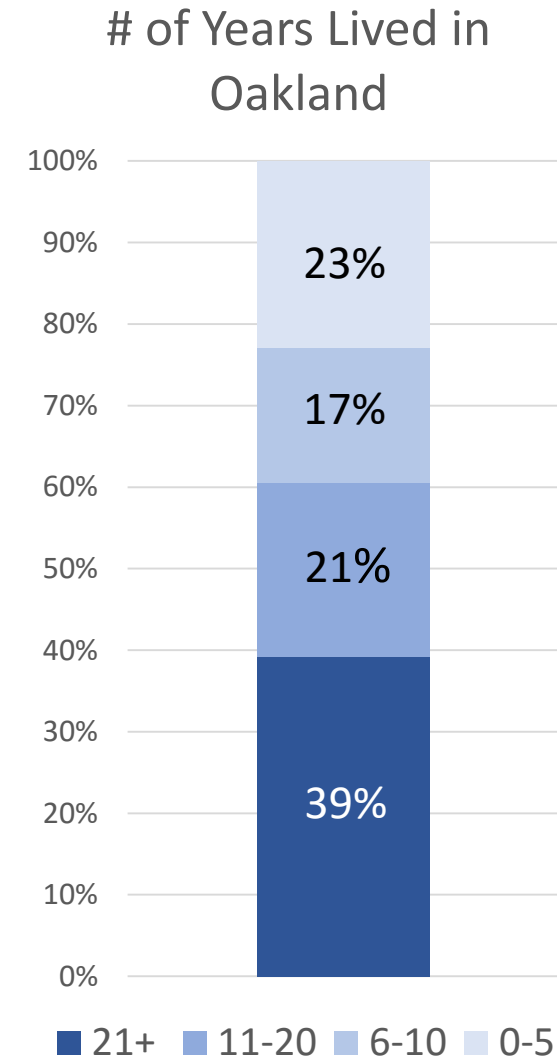
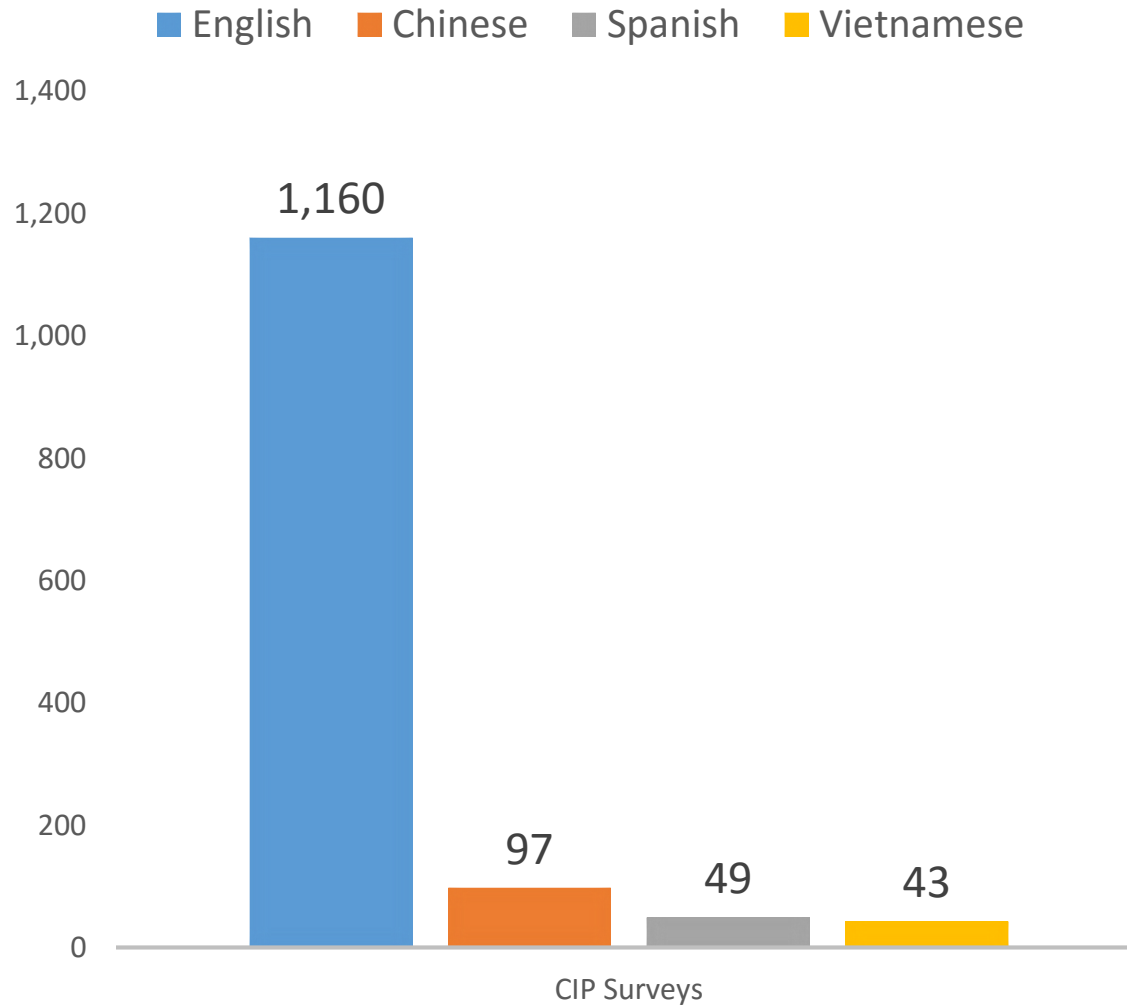
The specific CIP public outreach objectives were to:

- Identify City and community stakeholders with asset-specific interests
- Receive community input on a new prioritization process
- Build internal consensus among City stakeholders
- Ensure consistency with Citywide + Department Values/Priorities/Goals
- Encourage participation of stakeholders in the public engagement
- Share lessons learned and identify best practices

- **Approximately 650+ people** attended meetings and workshops (not including festival events)
- Meetings with **interpreters** when needed for Spanish, Cantonese and Vietnamese. Materials **translated** in same language.
- **4 large scale community meetings**
 - East Oakland at East Oakland Youth Development Center, Saturday, 6/16, (7 people)
 - West Oakland, DeFremery Park Recreation Center, Wednesday, 6/20 (~40 people)
 - Central / Downtown / North Oakland, Main Library, Saturday, 6/23 (~40 people)
 - Central / East Oakland, Dimond Branch Library, Saturday, 6/30 (~ 40 people)
- **1350 Surveys received**

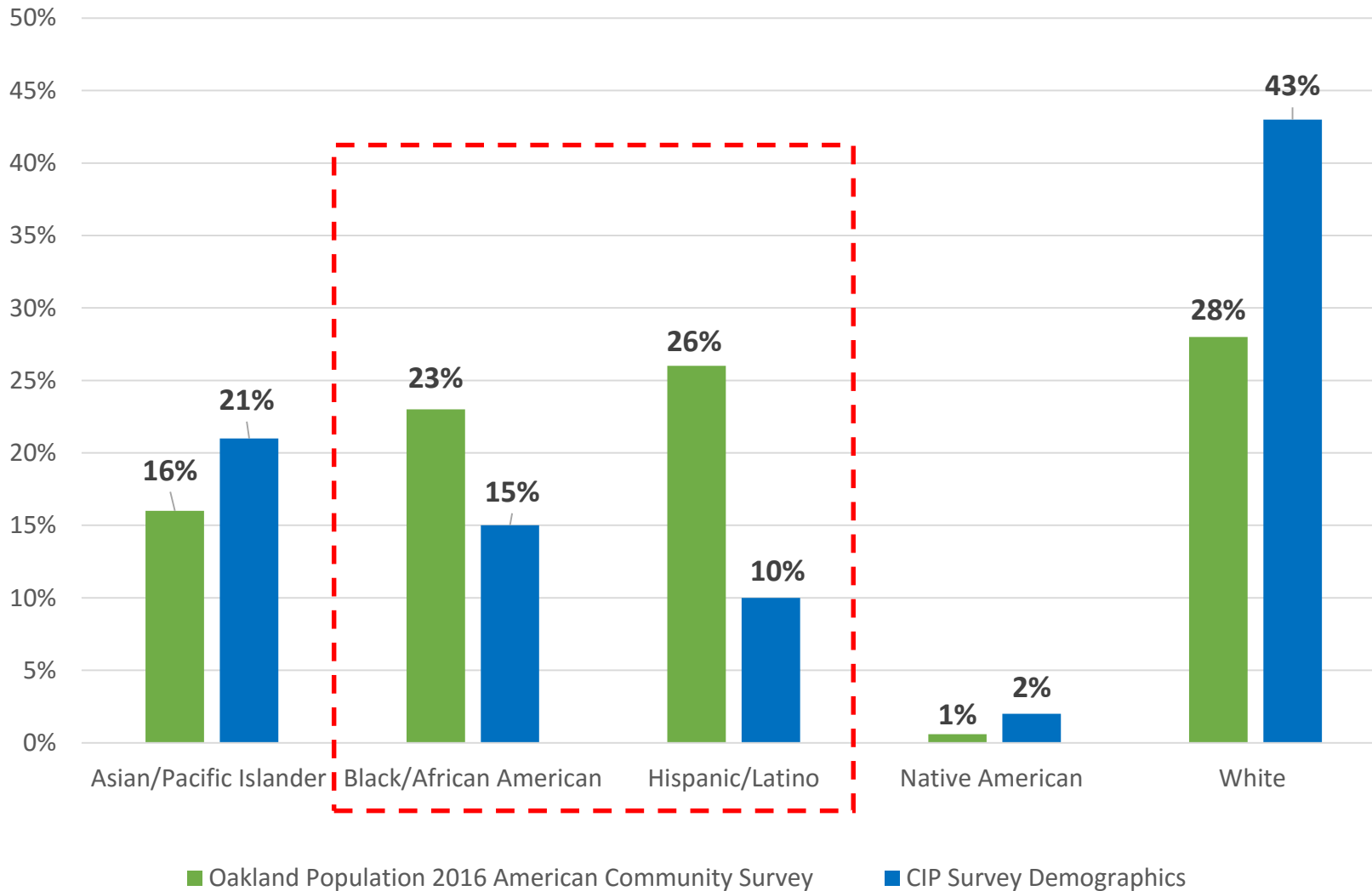


1,350 Surveys were collected, representing many long-time Oakland residents



The survey did not fully reflect Oakland's population

Oakland Population compared to CIP Survey Demographics



■ Oakland Population 2016 American Community Survey

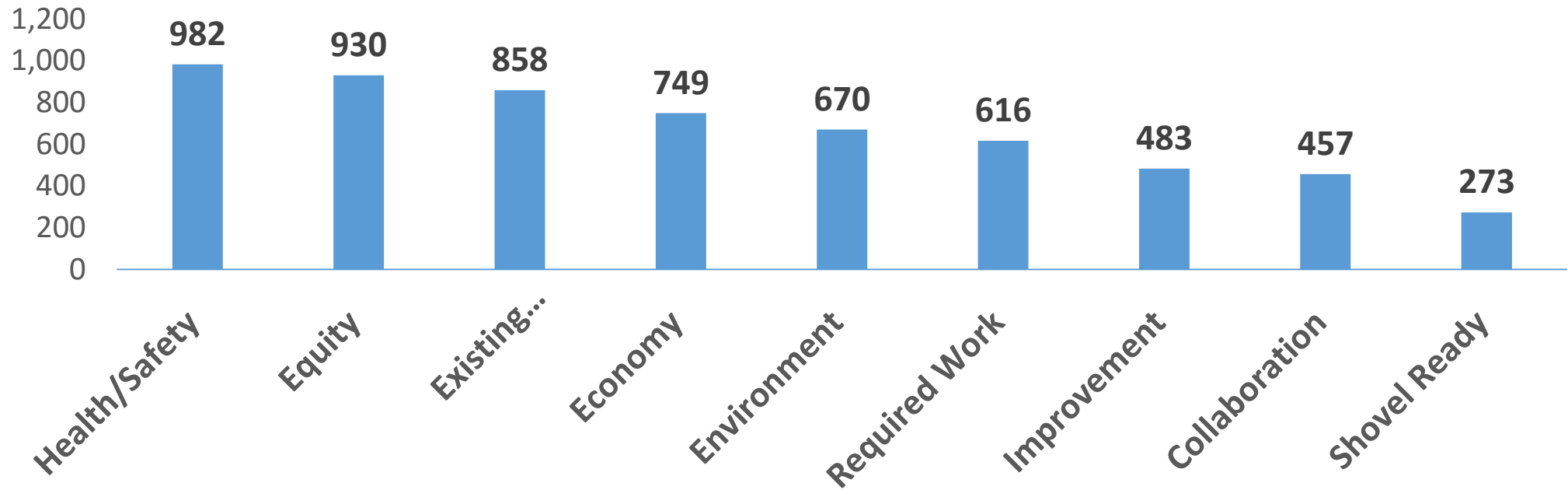
■ CIP Survey Demographics



City of
Oakland

Survey results were weighted to reflect population distribution

Raw Survey Results



	Health/Safety	Equity	Existing Conditions	Economy	Environment	Required Work	Improvement	Collaboration	Shovel Ready	TOTAL
Raw Distribution	16.4%	15.5%	14.3%	12.4%	11.2%	10.2%	8.1%	7.5%	4.5%	100%
Pop. Weighted	16.8%	16.1%	13.2%	13.3%	11.6%	9.6%	7.7%	7.5%	4.0%	100%
Proposed Score	16	16	13	13	11	10	8	8	5	100 pts

Qualitative input was specific to factors and related to broad planning themes

Factor Specific

- **Factors in General** – *not mutually exclusive, could be complicated to use so many*
- **Equity** – *needs to be a part of every factor, must define*
- **Safety** – *major issue in daily life*
- **Economy** – *recognize the opportunity to employ locally for construction*
- **Required Work** – *if it's required, why is it a question?*
- **Coordination** – *key to recognize community driven projects*

Capital Planning in General

- **Public Input** – *what/how/when?*
- **Outreach** – *ideas on how to better coordinate with the community*
- **Accountability and Trust** – *how to build it and stand behind this work*
- **Displacement** – *must be recognized in relation to capital investment*
- **Justice/Senior** – *need to specifically address seniors better*
- **Need for Better Planning** – *can't ignore past disinvestment; must also budget for maintenance, balance needs of today with tomorrow*



Citywide Prioritization Factors & Proposed Weighting System

Equity: Investment in Underserved Oakland (16 pts.)

Health & Safety
(16 pts.)

Existing (Asset) Conditions
(13 pts.)

Economy:
Community Investment
and Economic Prosperity
(13 pts.)

Environment:
Sustainability
(11 pts.)

Required Work:
Regulatory Mandate
(10 pts.)

Improvement:
Level and Quality of
Service (8 pts.)

Collaboration:
Multiple Asset Category
Benefits/ Collaborative
Opportunities (8 pts.)

Shovel Ready:
Project Readiness
(5 pts.)

Equity is also considered by identifying projects that **address disparities within** the Health/Safety, Economy, Environment, Improvement and Collaboration Factors

WHAT'S NEXT?



Problem Statement

Negative fund balances typically accumulate when operating expenses within the fund exceed ongoing revenue sources, and may grow over time as a result of the accumulation of negative interest. In recent years, the City has made significant progress in reducing negative balances within its budgeted funds, bringing their cumulative deficit down from \$138.8 million at the end of FY 2009-10 to \$72.6 million at the end of FY 2016-17.

Nonetheless, the outstanding liability is considerable, amounting to approximately 12.5 percent of the total General Purpose Fund (GPF) budget. Although many negative balances originate in non-GPF funds, the GPF backstops all funds with a negative balance if no other source of revenue is available to support them and therefore ultimately bears the full liability.

Of the \$72.6 million cumulative deficit, the greatest concern is the \$14.7 million that sits in non-reimbursable funds without a repayment plan, some of which have current appropriations obligated against them. An additional \$26.9 million sits in funds that have a repayment plan in place, but which are still of concern because those repayments generally come from the General Purpose Fund. Of lesser concern is the \$31 million negative balance in reimbursable funds for which expenditure reimbursements are anticipated.

While staff and the Council are to be commended for taking steps to begin to address the problem of negative fund balances, it would be prudent for the City to enact stronger fiscal control policies to ensure that progress continues and to prevent the recurrence of this problem in future.

Recommendations

The Budget Advisory Commission (BAC) recommends that the City Council take the following steps to resolve the issue of outstanding negative fund balances and prevent their recurrence.

1. Grant the City Administrator Authority to Enforce Fiscal Discipline.

- a. Revise the Consolidated Fiscal Policy to require that the City Administrator certify the availability of funds to support any mid-year expenditure appropriation prior to Council adoption. If no funding source can be identified, the City Administrator should be authorized to freeze existing expenditure appropriations within the same fund in order to maintain a balanced budget.

2. Amend the City's Comprehensive Fiscal Policy to Strengthen Existing Fiscal Control Measures.

- a. Statutorily prohibit negative fund balances from being carried forward from one fiscal year to the next on other than an exception basis, and codify the circumstances in which the City Administrator (or Director of Finance) may grant an exception.
- b. Statutorily prohibit any non-reimbursable fund from being allowed to remain in negative balance for more than a specified period of time. A limit of two to three years is recommended. Legislation would have to be prospective given that the City's current negative fund liability is unlikely to be cleared within that time frame.

Dan Adler 9/3/18 9:37 PM

Comment: Brad, is there an updated figure from June 30, 2018 that I should use here?

- c. Direct staff to propose for Council adoption policies and procedures to strengthen oversight of departmental grant management, in order to ensure proper grant accounting, expenditure controls and timely close-out of appropriations for which there is inadequate revenue.
- d. Direct staff to propose for Council adoption policies and procedures to strengthen the oversight of municipal bonds, in order to ensure proper bond program accounting, expenditure controls and timely close-out of appropriations for which there is inadequate revenue.

3. Adopt a Revised Repayment Schedule as Part of the FY 2019-21 Budget.

In a Finance Department report dated February 5, 2018 and presented to the Finance and Management Committee on February 27, 2018, staff recommended that the Council approve a revised repayment schedule for negative funds that are currently on repayment or that lack a repayment plan. The BAC endorses this recommendation and urges the Council to act on it as part of the FY 2019-21 budget development process, if not sooner.

4. Request Additional Analysis from Staff.

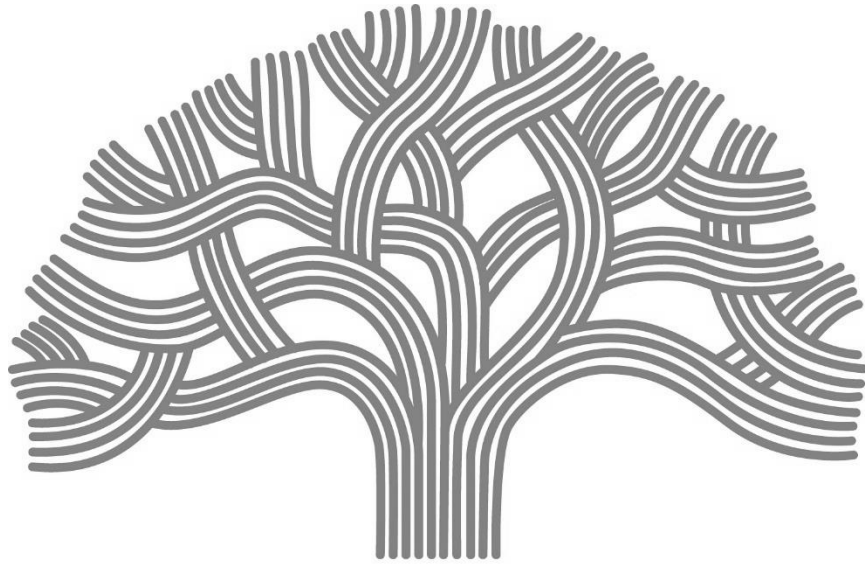
- a. Direct staff to conduct an analysis of negative balances in special funds that could potentially be repaid by special fund revenues (to reduce GPF liability).
- b. Direct staff to research the legality and feasibility of forgiving the repayment of accumulated negative interest charges in funds with no source of revenue other than the General Purpose Fund, and/or designating certain types of funds as non-interest accumulating.
- c. Direct staff to conduct or retain the services of a consultant to research the fiscal control and fund accounting policies of a handful of other California local jurisdictions, and to report back to the Council on any findings of best practice and relevant recommendations.

5. Improve Transparency Regarding the City's Negative Fund Liability.

Direct staff to report annually to the Council, as part of the year end close process, on the status of negative fund balances. Such reports should (i) clearly identify funds in which an existing negative balance is being carried forward, (ii) identify encumbrance carry forwards in which the encumbrance amount exceeds available sources within the fund, and (iii) specify the year in which each fund went negative in so that policymakers can distinguish legacy problems from newly emerging ones.

CITY OF OAKLAND

CONSOLIDATED FISCAL POLICY



Section 1. Budgeting Practices

Part A. General Provisions

The City's Fiscal Year shall begin on July 1st of each year and end on June 30th of the subsequent year. The City shall adopt a two-year biennial policy budget by June 30th of odd-numbered calendar years. The City shall amend its biennial policy budget (midcycle) by June 30th of even-numbered years. The budget and midcycle amendments shall be adopted by resolution of the City Council as required by the City Charter.

Part B. Policy on Balanced Budgets

The City shall adopt a balanced budget that limits appropriations to the total of estimated revenues and unallocated fund balances projected to be available at the close of the current fiscal year. The City Administrator shall be responsible for ensuring that the budget proposed to the City Council by the Mayor, adheres to the balanced budget policy.

This policy entails the following additional definitions and qualifications:

1. The budget must be balanced at an individual fund level.
2. City policies on reserve requirements for individual funds must be taken into account. The appropriated expenditures included in the balanced budget equation must include the appropriations necessary to achieve or maintain reserve targets.
3. Appropriated revenues can include transfers from unallocated fund balance where such fund balance is reasonably expected to exist by the end of the fiscal year preceding the year of the adopted budget. Transfers from fund balance are not to be counted as revenue if the fund balance is not reasonably expected to exist by the end of the fiscal year preceding the year of the adopted budget. (Note: The precise definition of 'fund balance' will vary from fund to fund, depending on the fund's characteristics and accounting treatment.)
4. Appropriated expenditures can include transfers to fund balance or to reserves.

From time to time the City Council may present changes in policy and consider additional appropriations that were not anticipated in the most recently adopted budget. Amendments by the City Council shall maintain a balanced budget.

Each fiscal year the City Administrator shall report to the City Council on actual revenues and expenditures in the General Purpose Fund and other funds as deemed necessary.

Part C. Use of Excess Real Estate Transfer Tax (RETT) Revenues

To ensure adequate levels of the General Purpose Fund reserves and to provide necessary funding for municipal capital improvement projects and one-time expenses, the City shall require that excess Real Estate Transfer Tax revenues be defined and used as follows:

1. The excess Real Estate Transfer Tax (RETT) revenue is hereby defined as any amount of projected RETT revenues that exceed 15% of General Purpose Fund Tax Revenues (inclusive of RETT).
2. The excess Real Estate Transfer Tax, as described in this section, shall be used in the following manner and appropriated through the budget process:
 - a. At least 25% shall be allocated to the Vital Services Stabilization Fund, until the value in such fund is projected to equal to 15% of total General Purpose Fund revenues over the coming fiscal year; and
 - b. At least 25% shall be used to fund debt retirement and unfunded long-term obligations such as negative fund balances, Police and Fire Retirement System (PFRS) unfunded liabilities, CalPERS pension unfunded liabilities, paid leave unfunded liabilities, and Other Post-Employment Benefits (OPEB) unfunded liabilities; and
 - c. The remainder shall be used to fund one-time expenses or to augment reserves.
3. Use of the excess RETT revenues for purposes other than those established in this section must be authorized by City Council resolution. The resolution shall explain the need for using excess RETT revenues for purposes other than those established in this section. The resolution shall also include steps the City will take to return to using excess RETT revenues pursuant to this section.
4. Following the completion of the annual audit, excess RETT revenues will be analyzed to determine whether the transfers to the Vital Services Stabilization Fund or expenditures to fund debt retirement and unfunded long-term obligations were sufficient. If insufficient funds were transferred, a true-up payment shall be made in the next fiscal year. If the transfers exceed the actual requirement, the amounts in excess may be credited against allocations in the next fiscal year.

Part D. Use of One-Time Revenues

1. One-time revenues are defined as resources that the City cannot reasonably expect to receive on an ongoing basis, such as proceeds from asset sales and debt refinancing. This part shall not apply to the use of excess RETT revenues pursuant to Section 1. Part C.
2. Fiscal prudence requires that any unrestricted one-time revenues be used for one-time expenses. Therefore, one-time revenues shall be used in the following manner, unless they are legally restricted to other purposes: to fund one-time expenditures, to fund debt retirement and unfunded long-term obligations such as negative fund balances, Police and Fire Retirement System (PFRS) unfunded liabilities, CalPERS pension unfunded liabilities, paid leave unfunded liabilities, and Other Post-Employment Benefits (OPEB) unfunded liabilities; or shall remain as fund balance.

3. Use of one-time revenues for purposes other than those established in in this section must be authorized by City Council resolution. The resolution shall explain the need for using one-time revenues for purposes other than those established in this section. The resolution shall also include steps the City will take to return to using one-time revenues pursuant to this section.

Part E. Use of Unassigned General Purpose Fund Balance

Any unassigned General Purpose Fund balance, as projected in the 3rd Quarter Revenue and Expenditure Report, and not budgeted for other purposes, shall be used in accordance with Section 1, Part D.

Part F. Analysis of Funding for Debt or Unfunded Long-Term Obligations From Certain Revenues

When excess RETT or other one-time revenues are used to fund accelerated debt retirement or unfunded long-term obligations, the City Administrator shall present his or her analysis and recommendations to the Council based on the best long-term financial interest of the City.

Part G. Criteria for Project Carryforwards and Encumbrances

Previously approved but unspent project appropriations ("carryforwards") and contingent liability reserves for current purchases or contracts that are paid in the following fiscal year ("encumbrances") are financial obligations against reserves. Fiscal prudence requires that such obligations be limited.

Each fiscal year, the Finance Department will submit a list of eligible carryforwards and encumbrances to all departments for evaluation for all funds, including the General Purpose Fund. Departments may request to retain some or all carryforwards and encumbrances when such balances are:

1. Deemed essential to the delivery of active city projects, programs and services; or
2. If the liquidation of such balances would be in violation of legislative or legal requirements.

A departmental request to retain project carryforwards and/or encumbrances must be submitted to the Finance Department. Departments shall provide specific reasons for requested project carryforwards and encumbrance carryforwards, including, but not limited to, those reasons outlined above. Carryforward of project appropriations in funds with negative balances will only be allowed on an exception basis.

The Finance Department will recommend to the City Administrator an action on the departmental requests. The City Administrator shall make a final determination on project carryforward and encumbrances, and will direct the Finance Department to make carryforwards

available to the appropriate department.

Part H. Grant Retention Clauses

Prior to the appropriation of revenues from any grant outside of the budget process, the City Council shall be informed of any retention clauses that require the City to retain grant-funded staff, services, programs, or operations beyond the term of the grant. The fiscal impacts of such retention clauses shall be disclosed. During the biennial budget process staff shall report to the Council the ongoing projected fiscal impacts of such retention clauses.

Part I. Alterations to the Budget

Substantial or material alterations to the adopted budget including shifting the allocation of funds between departments and substantial or material changes to funded service levels, shall be made by resolution of the City Council.

The Finance Department will include departmental expenditure projections for the General Purpose Fund in the Second Quarter Revenue & Expenditure Report. In the event that a department is projected to overspend in the General Purpose Fund by more than one percent (1%), the City Administrator shall bring an informational report to the City Council within 60 days following acceptance of the Revenue & Expenditure report by the City Council. The report shall list the actions the Administration is taking to bring the expenditures into alignment with the budget.

Part J. Transfers of Funds between accounts.

The City Administrator shall have the authority to transfer funds between personnel accounts, and between non-personnel accounts within a department. The City Administrator shall have the authority to transfer funds allocated to personnel accounts to non-personnel accounts within a department provided that cumulative transfers within one fiscal year do not exceed 5% of the original personnel account allocation of that department. The City Administrator shall have the authority to transfer funds from non-personnel accounts to personnel accounts within a department. The City Administrator shall have the authority to transfer funds allocated to personnel accounts to non-personnel accounts if the transfer is required to meet the conditions of or maximize the funding derived from a grant that has been approved by the City Council. For the purposes of this section accounts for the provision of temporary personnel services shall be considered personnel accounts.

Part K. Pay-Go Account Expenditures, Priority Project Fund Expenditures, and Grants

The City Council hereby finds and determines that it is in the public interest to spend Pay-go account fund to facilitate and support programs & services of the City of Oakland, capital improvement projects of the City of Oakland, and programs & capital improvement projects of the public schools and other public entities within the City of Oakland. The Council authorizes Pay-Go account funds to be used for the following purposes:

Capital Improvements:

1. To pay for or augment funding for a City of Oakland capital improvement project including planning and pre-construction services for projects such as, but not limited to, feasibility studies and design, landscaping, architectural and engineering services and all services and materials needed to construct a capital improvements such as, but not limited to, contractor services, lumber, concrete, gravel, plants and other landscape materials, fountains, benches, banners, signs, affixed artwork and any other design and decorative elements of the project; and
2. To provide a grant to a public school, including a school chartered by the State of California or Oakland Unified School District, or other public entity for use on capital improvement project within the City of Oakland, including planning and pre-construction services for projects such as, but not limited to, feasibility studies and design, landscaping, architectural and engineering services and all services and materials needed to construct a capital improvements such as, but not limited to, contractor services, lumber, concrete, gravel, plants and other landscape materials, fountains, benches, banners, signs, affixed artwork and any other design and decorative elements of the project; and

Furniture & Equipment:

3. To pay for or augment funding for purchase of furniture and equipment, including computer equipment and software, to be used by participants in a program operated by the City of Oakland; and
4. To provide a grant to a public school, including a school chartered by the State of California or Oakland Unified School District, or another public entity to be used for furniture and equipment, including computer equipment and software, to be used by participants in a program operated by the public school or public entity.

Pay-go purposes stated above shall operate as restrictions on Pay-go expenditures or Pay-go grants, regardless of the Pay-go account funding source.

Pay-go purposes stated above shall apply to any and all Pay-go expenditures or grants made by the Mayor and each City Councilmember. All Pay-go expenditures and grants shall be administered by the City Administrator on behalf of the city, and grant agreements shall be required for all such grants.

In accord with the City Council's motion approving the initial allocation of Councilmember Priority Project funds on June 8, 2006, the City Councilmembers must obtain City Council approval for all Priority Project expenditures.

All Priority Project fund grants approved by the City Council and shall be administered and executed by the City Administrator on behalf of the city, and grant agreements shall be required for all such grants.

Section 2. Reserve Funds

Part A. General Purpose Fund Emergency Reserve Policy

1. Council hereby declares that it shall be the policy of the shall City of Oakland maintain in each fiscal year a reserve equal to seven and one-half (7.5%) of the General Purpose Fund (Fund 1010) appropriations as adopted in the biennial or midcycle budget, and not including prior year carryforwards, encumbrances, or appropriations to Fund Balance for, such fiscal year (the "General Purpose Fund Emergency Reserve Policy"),
2. Each year, upon completion of the City's financial audited statements, the City Administrator shall report the status of the General Purpose Funds Emergency Reserve to the City Council and on the adequacy of the of the 7.5% reserve level. If in any fiscal year the General Purpose Fund Reserve Policy is not met, the City Administrator shall present to Council a strategy to meet the General Purpose Funds Emergency Reserve Policy. Each year, the City Administrator shall determine whether the 7.5% reserve level requires adjustment and recommend any changes to the City Council.
3. The amounts identified as the General Purpose Funds Emergency Reserve may be appropriated by Council only to fund unusual, unanticipated and seemingly insurmountable events of hardship of the City, and only upon declaration of fiscal emergency. For the purposes of this Ordinance, "fiscal emergency" may be declared (1) by the Mayor and approved by the majority of the City Council, or (2) by a majority vote of the City Council.
4. Prior to appropriating monies from the General Purpose Funds Emergency Reserve, the City Administrator shall prepare and present such analysis to the City Council. Upon review and approval of the proposed expenditure by the City Council, and appropriate fiscal emergency declaration necessary for the use of GPF reserve, the City Administrator will have the authority to allocate from the reserves.

Part B. Vital Services Stabilization Fund Reserve Policy

1. Council hereby declares that it shall be the policy of the City of Oakland to maintain a Vital Services Stabilization Fund (VSSF) with a target funding level of 15% of General Purpose Fund Revenues. The funding of the Vital Services Stabilization Fund shall be made pursuant to Section 1, Part C concerning excess Real Estate Transfer Tax.
2. In years when the City forecasts that total General Purpose Fund revenues will be less than the current year's revenues, or anytime significant service reductions, such as layoffs or furloughs, are contemplated due to adverse financial conditions, use of this fund must be considered to maintain existing services.
3. Use of the VSSF must be authorized by City Council resolution. The resolution shall explain the need for using the VSSF. The resolution shall also include steps the City will take in order to replenish the VSSF in future years.

Part C. Capital Improvements Reserve Fund

1. Council hereby declares that it shall be the policy of the City of Oakland to maintain a Capital Improvements Reserve Fund.
2. Revenue received from one time activities, including the sale of Real Property, shall be deposited into the Capital Improvements Reserve Fund, unless otherwise directed by a majority vote of the City Council. Interest earnings on monies on deposit in the Capital Improvements Reserve Fund shall accrue to said fund and be maintained therein.
3. Monies on deposit in the Capital Improvements Reserve Fund may be appropriated by Council to fund unexpected emergencies, major capital maintenance, repair costs to City-owned facilities and to fund capital improvement projects through the Five-Year Capital Improvement Program.

Section 3. Budget Process, Fiscal Planning, Transparency, and Public Participation

Unless otherwise noted all timelines apply only to budget development years, normally odd numbered years and not to mid-cycle revisions to an adopted two-year budget.

1. Assessment of Stakeholder Needs, Concerns and Priorities

Timeline: Budget Advisory Committee review prior to survey release. Survey completion by December 5th of even-numbered years. Results publicly available within three weeks of survey's close.

Requirements: The City Administrator should develop or secure a statistically valid survey for assessing the public's concerns, needs and priorities prior to the development of the biennial budget. Whenever feasible, the City should conduct a professional poll administered to a statistically relevant and valid sample of residents that is representative of Oakland's population in terms of race, income, neighborhood, age, profession, family size, homeownership/renter-ship, etc. If that's not possible, then demographic information should be collected and reported out with the survey results.

Prior to release, the survey questions shall be submitted to the Budget Advisory Committee by September 1st of even numbered years for review of bias, relevance, consistency in administration, inclusion of benchmark questions, and ability to assess concerns, needs and priorities. The survey instrument, method of dissemination, and any instructions for administration shall be publicly available. The survey should be conducted following the November election and before December 5th.

If the City cannot afford a professional survey, an informal survey shall be made available for broad dissemination by the Mayor and Councilmembers through community list serves and other communication channels. Furthermore, the City Administrator shall take steps to promote participation, such as issuing a Flyer promoting participation in the survey and methods of participation (survey internet link, email, phone number) and posting such Fliers near publicly available computers in all City libraries, Recreation Centers, and Senior Centers. A list of those dissemination channels should be publicly available along with survey results.

Survey results should be publicly available within three weeks of the completion and analysis of the survey. Survey results should be made widely available, shared on social media, and published on the City's Budget website. In the event that City's statistically valid survey has been completed, the Mayor and City Administrator shall include in their proposed budget a summary of the survey data and a statement regarding how the data was or was not incorporated into the final proposed budget. Informal surveys and their results shall be made public but not included in their proposed budget document.

The City Administrator shall develop a standardized and diverse means of collecting resident input via other means prior to budget development.

2. Council Initial Budget Briefing and Priorities Discussion

Timeline: February

Requirements: The Mayor and City Council will hold a bi-annual budget workshop soon after the commencement of the Council term. The workshop will include briefings on estimated baseline expenditures, revenue projections and an overview of the City's budgeting process. The workshop will provide the Mayor and Council with the opportunity to begin discussing priorities for the next budget year based on the Assessment of Stakeholder Needs, Concerns and Priorities.

3. Five-Year Forecast

Timeline: Produced and heard by the Council's Finance & Management Committee or the full City Council in February or March. Forecast Fact Sheets should be distributed to City community centers and Forecast data should be available on Open Data Portal within two weeks of the Council hearing.

Requirements: Each Budget Cycle, the City Administrator must prepare a Five-Year Forecast.

The Five-Year Financial Forecast (“Forecast”) is a planning tool that estimates the City's likely revenues and expenditures over five-years, based on appropriate financial, economic, and demographic data. The purpose of the Forecast is to surface all major financial issues and estimate future financial conditions to support informed long-term decision making. Such planning provides for greater financial stability, signals a prudent approach to financial management, and is consistent with best practices.

The Forecast shall contain the two-year baseline budget for the forthcoming budget period, clearly reflecting projected expenditures to maintain existing service levels and obligations, plus an additional three-year forecast of revenues and expenditures. The Baseline Budget shall consist of projected expenditures necessary to maintain existing staffing and service levels, plus an estimate of anticipated revenues for the two-year period.

The Forecast shall also contain information on the variance between prior forecasts and actual amounts, including the factors that influenced these variances. Revenue estimates shall be based on the most current data available; minimally revenue projections shall take into account projected revenue for the current fiscal year, as reflected in the 2nd quarter Revenue and Expenditure Report, with appropriate trending into future years and an explanation as to how such revenue projections were derived.

The report shall include a Five-Year Forecast "Fact Sheet" document, which summarizes the Forecast's key findings with simplified text and graphics to make this important budgetary information more accessible to the general public. Within two weeks after the Forecast is heard by the City Council, the City Administrator shall print and distribute the Forecast Fact Sheet to all City libraries, recreation centers and senior centers, including in languages required by Oakland's Equal Access Ordinance. The full Forecast shall also be posted on the City of Oakland's website. Forecast data shall be available in open data format on Oakland's data portal.

4. Statement of Councilmember Priorities

Timeline: Written submission due by March 15th.

Requirements: City Council Members will have the opportunity to advise the Mayor and City Administrator publicly of their priorities. Each Councilmember shall be invited to submit up to seven expenditure priorities in ranked and/or weighted order for changes to the baseline budget as presented in the Five-Year Forecast. Councilmember priority statements must be submitted as part of a report to be heard by the City Council and/or in a publicly available writing to the Mayor and City Administrator by March 15. In addition to the priorities, Councilmembers may also submit other suggestions, including revenue suggestions.

5. Administrator's Budget Outlook Message & Calendar Report

Timeline: Heard by City Council before April 15th.

Requirements: The City Administrator shall bring as a report to the City Council a Budget Outlook Message & Calendar no later than April 15th that provides an overview of the budget development process and lists all key dates and estimated dates of key budget events, including, but not limited to the release of the Mayor and Administrator's Proposed Budget, Community Budget Forums, Council meetings, and formal budget passage dates. This publication shall be posted on the City's website and by other means determined by the City Administrator.

6. Release of Mayor & Administrator's Proposed Budget & Fact Sheet

Timeline: Published and publicly available by May 1st. Heard by City Council and Fact Sheet distributed by May 15th.

Requirements: The Proposed Budget must be released by May 1st and shall clearly indicate any substantive changes from the current baseline budget, including all changes to service levels from the current budget. The Proposed Budget shall indicate staffing by listing the number of positions in each classification for each Department, including a listing of each position proposed for addition or deletion. The Council shall hold a public meeting to present the Proposed Budget no later than May 15th in budget adoption years. The full proposed budget document shall be made available online from the City's website, and printed copies shall be available in all City libraries. Additionally, the proposed budget data shall be available in open data format on the City's open data portal by May 1st. Every effort should be made to thoroughly respond to any public request for departmental budget details, such as line item budgets. The requested information shall also be made available on the City's website and open data portal within a reasonable time following the request.

The Proposed Budget must include a Budget Fact Sheet with easy-to-understand graphics and text explaining the City's overall finances, the Proposed Budget and that year's Budget Calendar. The Fact Sheet shall be published in languages required by Oakland's Equal Access Ordinance. The Fact Sheet shall be printed and made available in all City Recreation Centers and Senior Centers as well as all City libraries by May 15th or the presentation to the Council, whichever is

sooner.

7. Community Budget Forums

Timeline: During the months of May and June of odd-numbered years

Requirements: The Administration and Council shall hold at least one (1) Community Budget Forum in each council district. These forums, organized by the City Administrator's Office in partnership with Councilmembers shall be scheduled to maximize residents' access. The forums should include sufficient time for a question and answer period in a format that maximizes community participation, as well as a presentation of budget facts by City staff. One or more of the forums must be scheduled in the evening. Another must be scheduled on the weekend. These meetings shall also be scheduled so that Councilmembers have sufficient opportunity to attend a meeting close to their council district. Every member of the City Council shall make their best effort to attend the Community Budget Forum in their council district. Sufficient Fact Sheets in all available languages shall be available at all Forums.

These forums should be publicized in social media and via other means in a manner that is linguistically and culturally appropriate. City Council staff shall work with community-based, faith-based, identity based, and district specific organizations to ensure that a representative and broad group of residents is aware and encouraged to attend each forum.

8. Ongoing Public Education

Timeline: During the months of May and June of even-numbered years

Requirements: Beginning with the first even-numbered year following adoption of this ordinance, the Administration and City Council shall hold at least three (3) Community Budget Education Presentations in different neighborhoods throughout the City and outside of City Hall. These presentations shall seek to increase Oakland residents understanding and awareness of the City Budget and Budget process.

9. Budget Advisory Commission's Report

Timeline: June 1st

Requirements: The Budget Advisory Committee (BAC) shall be requested to submit published, written report to the full City Council regarding the proposed budget with any suggested amendments no later than June 1 in budget adoption years. If submitted, the statement shall be published as part of the next budget report to the City Council. The BAC is encouraged to provide similar statements during the mid-cycle budget revise and any other significant budget actions.

10. Council President's Proposed Budget

Timeline: June 17th

Requirements: The City Council President, on behalf of the City Council, shall prepare a proposed budget for Council consideration to be heard at a Special City Council Budget Hearing occurring on or before June 17th. The Council President may delegate the duty to prepare a budget proposal to another member of the Council. The Finance Department will provide a costing analysis for proposed amendments. The City Council may schedule additional Special City Council Budget Hearings or Workshops as needed.

11. Council Budget Amendments

Timeline: No later than up to three (3) days prior to final budget adoption for public noticing

Requirements: In addition to the Council President's proposed budget, any Councilmember or group of Councilmembers may submit proposed budget amendments at any time during the budget process. However, the adopted budget shall not contain substantive amendments made on the floor by Councilmembers at the final meeting when the budget is adopted. All substantive amendments must have been published in the City Council agenda packet for at least three days prior to the budget's final adoption and posted on the City's budget website. This shall not preclude Council members from combining elements from various proposals, provided each element considered has been published in the City Council agenda packet as a component of one proposal. This three-day noticing requirement may be waived by a vote of Council upon a finding that (1) new information impacting the budget by at least \$1 million dollars came to the attention of the body after the publication deadline making it not reasonably possible to meet the additional notice requirement and (2) the need to take immediate action on the item is required to avoid a substantial adverse impact that would occur if the action were deferred to a subsequent special or regular meeting, such as employee layoffs.

Councilmembers will present their proposed amendments in an easy to understand, standardized format provided by the City Administrator. The format should allow the proposals to be easily compared to the Mayor's Proposed Budget and to one another. Additions and reductions shall be clearly noted in separate sections.

In order to provide sufficient time to evaluate the cost of proposals, Councilmembers should request costing analyses for proposed budget amendments or line-items within a budget amendment to the City Administrator at least six (6) working days prior to the City Council meeting where that amendment will be considered.

12. Process Feedback & Continual Improvement

Timeline: September 30th following budget adoption

Requirements: The Budget Advisory Commission (BAC) shall be requested to submit an Informational Report to the Council's Finance and Management Committee and City Council containing their analysis of the budget adoption process including, but not limited to: 1) the informational quality of the Proposed Budget; 2) the City Administration's and City Council's attention to engaging the public and its impacts on the budget process and product; 3) the level of

transparency and open dialogue in all public meetings dedicated to the budget; and 4) opportunities for improving the process in future years. In assessing opportunities for continually improving public participation in the budget process, the Administration, City Council and BAC shall be requested to consider the following guiding principles:

- **Inclusive Design:** The design of a public participation process includes input from appropriate local officials as well as from members of intended participant communities. Public participation is an early and integral part of issue and opportunity identification, concept development, design, and implementation of city policies, programs, and projects.
- **Authentic Intent:** A primary purpose of the public participation process is to generate public views and ideas to help shape local government action or policy.
- **Transparency:** Public participation processes are open, honest, and understandable. There is clarity and transparency about public participation process sponsorship, purpose, design, and how decision makers will use the process results.
- **Inclusiveness and Equity:** Public participation processes identify, reach out to, and encourage participation of the community in its full diversity. Processes respect a range of values and interests and the knowledge of those involved. Historically excluded individuals and groups are included authentically in processes, activities, and decision and policymaking. Impacts, including costs and benefits, are identified and distributed fairly.
- **Informed Participation:** Participants in the process have information and/or access to expertise consistent with the work that sponsors and conveners ask them to do. Members of the public receive the information they need, and with enough lead time, to participate effectively.
- **Accessible Participation:** Public participation processes are broadly accessible in terms of location, time, and language, and support the engagement of community members with disabilities.
- **Appropriate Process:** The public participation process uses one or more engagement formats that are responsive to the needs of identified participant groups; and encourage full, authentic, effective and equitable participation consistent with process purposes. Participation processes and techniques are well- designed to appropriately fit the scope, character, and impact of a policy or project. Processes adapt to changing needs and issues as they move forward.
- **Use of Information:** The ideas, preferences, and/or recommendations contributed by community members are documented and given consideration by decision-makers. Local officials communicate decisions back to process participants and the broader public, with a description of how the public input was considered and used.
- **Building Relationships and Community Capacity:** Public participation processes invest in and develop long-term, collaborative working relationships and learning opportunities with community partners and stakeholders. This may include relationships with other temporary or ongoing community participation venues.
- **Evaluation:** Sponsors and participants evaluate each public participation process with the collected feedback and learning shared broadly and applied to future public participation efforts.

Fairbank,
Maslin,
Maullin,
Metz &
Associates
FM3

2017 CITY OF OAKLAND
BUDGET PRIORITIES SURVEY
329-728
DRAFT 3A
A/B SPLIT

Hello, I'm _____ from _____, a public opinion research firm. We're conducting a survey about issues that concern people in Oakland. I am not trying to sell you anything and I won't ask for a donation of any kind.

(FOR LISTED VOTER SAMPLE, READ THE FOLLOWING INTRO:)

May I speak to _____? **(YOU MUST SPEAK TO THE VOTER LISTED. VERIFY THAT THE VOTER LIVES AT THE ADDRESS LISTED, OTHERWISE TERMINATE.)**

(FOR RDD SAMPLES, READ THE FOLLOWING INTRO:)

May I speak with the adult in your household who celebrated a birthday most recently? **(IF NOT AVAILABLE, ASK:)** May I speak to another adult member of your household who is 18 years old or older?"

(IF VOTER WISHES TO COMPLETE THE INTERVIEW IN SPANISH OR CHINESE, PLEASE HAND OFF TO BILINGUAL INTERVIEWER)

A. Before we begin, I need to know if I have reached you on a cell phone, and if so, are you in a place where you can talk safely without endangering yourself or others? **(IF NOT ON A CELL PHONE, ASK: Do you own a cell phone?)**

- Yes, cell and can talk safely ----- 1
- Yes, cell but cannot talk safely----- **TERMINATE**
- No, not on cell, but own one----- 2
- No, not on cell and do not own one ----- 3
- (DON'T READ) DK/NA/REFUSED ----- TERMINATE**

(ASK ONLY IF RDD SAMPLE)

B. In what year were you born?

- 1998-1992 (18-24)----- 1
- 1991-1987 (25-29)----- 2
- 1986-1982 (30-34)----- 3
- 1981-1977 (35-39)----- 4
- 1976-1972 (40-44)----- 5
- 1971-1967 (45-49)----- 6
- 1966-1962 (50-54)----- 7
- 1961-1957 (55-59)----- 8
- 1956-1952 (60-64)----- 9
- 1951-1942 (65-74)----- 10
- 1941 or earlier (75+) ----- 11
- (REFUSED/NA) ----- 12**

(ASK ONLY IF RDD SAMPLE)

C. I will not need to know your exact address, but in order to help me verify that you live within the boundaries of our interviewing area, could you please tell me what the ZIP code is for your current residence? **(TERMINATE ALL WHOSE ZIP CODE IS NOT ON THE LIST BELOW)**

- 94601 ----- 1
- 94602 ----- 2
- 94603 ----- 3
- 94604 ----- 4
- 94605 ----- 5
- 94606 ----- 6
- 94607 ----- 7
- 94608 ----- 8
- 94609 ----- 9
- 94610 ----- 10
- 94611 ----- 11
- 94612 ----- 12
- 94618 ----- 13
- 94619 ----- 14
- 94621 ----- 15
- All other responses ----- **TERMINATE**

(RESUME ASKING ALL RESPONDENTS)

1. **(T)** Generally speaking, how would you rate Oakland as a place to live: is it an excellent place to live, a good place, only fair, or a poor place to live?

- Excellent ----- 1
- Good ----- 2
- Just fair ----- 3
- Poor ----- 4
- (DON'T KNOW/NA)** ----- 5

2. (T) Next, in the upcoming two-year budget, what are the two most important issues facing Oakland residents that you would like to see prioritized in the City government budget? **(DO NOT READ OPTIONS; OPEN-END. RECORD VERBATIM RESPONSE AND THEN CODE AFTER INTERVIEW IS COMPLETE)**

	<u>FIRST CHOICE</u>	<u>SECOND CHOICE</u>
Blight/abandoned buildings -----	1-----	1
Cable TV service -----	2-----	2
Crime/Violence -----	3-----	3
Code enforcement -----	4-----	4
Drug abuse -----	5-----	5
Dumping/Illegal dumping -----	6-----	6
Education/public schools -----	7-----	7
Emergency medical response / fire safety -----	8-----	8
Environment -----	9-----	9
Facilities Condition -----	9a-----	9a
Fire safety/fire inspections -----	10-----	10
Garbage/Recycling pick-up -----	11-----	11
Graffiti -----	12-----	12
Government waste/inefficiency -----	13-----	13
Homelessness -----	14-----	14
Housing costs/affordability -----	15-----	15
Jobs/keeping businesses -----	16-----	16
Library services -----	17-----	17
Parking -----	18-----	18
Public transportation/buses -----	19-----	19
Recreation programs -----	20-----	20
Revitalizing downtown -----	21-----	21
Revitalizing neighborhoods -----	22-----	22
Sewer maintenance -----	23-----	23
Street lighting -----	24-----	24
Street and sidewalk maintenance -----	25-----	25
Taxes too high -----	26-----	26
Traffic congestion/traffic flow -----	27-----	27
Tree trimming -----	28-----	28
Water supplies -----	29-----	29
Youth activities -----	30-----	30
Other -----	31-----	31
(DK/NA) -----	32-----	32

3. (T) Next, how would you rate the overall job being done by Oakland city government in providing services to the people who live here: excellent, good, only fair or poor?

- Excellent ----- 1
- Good ----- 2
- Only fair----- 3
- Poor ----- 4
- (DON'T KNOW/NA) ----- 5

NOW I AM GOING TO ASK YOU SOME QUESTIONS THAT DEAL WITH OAKLAND'S CITY GOVERNMENT BUDGET.

4. First, how closely do you follow issues related to the Oakland City budget? (READ LIST)

- Extremely closely----- 1
- Very closely ----- 2
- Somewhat closely----- 3
- Not too closely ----- 4
- Not at all closely ----- 5
- (DON'T KNOW/NA) ----- 6

5. And how interested are you in learning more about Oakland's City budget and how its funds are allocated? (READ LIST)

- Extremely interested----- 1
- Very interested ----- 2
- Somewhat interested ----- 3
- Not too interested ----- 4
- Not at all interested ----- 5
- (DON'T KNOW/NA) ----- 6

6. Next, I am going to ask you to imagine you are in charge of Oakland’s City budget. The City of Oakland has five major priority goals and I would like you to tell me how you would prioritize City spending to achieve these goals. For this exercise, assume you have 100 dollars to spend on all five. After I read you all of the goals, please tell me how many dollars out of 100 you would spend on each goal, keeping in mind that the total must add up to 100 dollars. **(READ RANDOMIZED LIST OF GOALS; RE-READ INSTRUCTIONS AS NECESSARY AND ENSURE THAT THE TOTAL DOLLAR AMOUNT EQUALS \$100)**

<u>PRIORITY GOAL</u>	<u>DOLLAR AMOUNT</u>
<input type="checkbox"/> A safe city -----	-----
<input type="checkbox"/> A sustainable, prosperous economy that creates quality jobs-----	-----
<input type="checkbox"/> An attractive, vibrant community -----	-----
<input type="checkbox"/> A just, equitable and diverse community -----	-----
<input type="checkbox"/> Competent and effective delivery of City services -----	-----
TOTAL -----	-----\$100

7. Now I am going to mention some of the services the City provides its residents. Every two years, the City faces hard choices about these services in order to balance its budget. After you hear each one, please tell me whether you think cuts should be made to that service in order to balance the budget, or whether you would **be** willing to pay additional taxes or fees to maintain or improve that service. **(RANDOMIZE CUTS/WILLING TO PAY PHRASES) (IF CUTS, ASK: Would you be willing to make large cuts or just some cuts?) (IF PAY MORE, ASK: Would you be willing to pay a little more to maintain this service, or pay significantly more to improve it?) (RANDOMIZE)**

	<u>LARGE CUTS</u>	<u>SOME CUTS</u>	<u>PAY SOME TO MAIN.</u>	<u>PAY SIG. MORE TO IMPR.</u>	<u>(DK/NA)</u>
<input type="checkbox"/> a. (T) Library services and hours -----	1	2	3	4	5
<input type="checkbox"/> b. (T) Fire prevention and response -----	1	2	3	4	5
<input type="checkbox"/> c. (T) Artistic and cultural activities and events-----	1	2	3	4	5
<input type="checkbox"/> d. (T) Timely response to resident requests for services-----	1	2	3	4	5
<input type="checkbox"/> e. (T) Youth programs at city parks and recreation centers -----	1	2	3	4	5
<input type="checkbox"/> f. Providing services to Oakland’s immigrant population -----	1	2	3	4	5
<input type="checkbox"/> g. (T) Clean-up and removal of illegal dumping-----	1	2	3	4	5
<input type="checkbox"/> h. (T) Job training and employment programs -----	1	2	3	4	5
<input type="checkbox"/> i. (T) Maintenance of public parks, street medians and other open space -----	1	2	3	4	5
<input type="checkbox"/> j. Providing services to homeless populations -----	1	2	3	4	5

		<u>LARGE</u>	<u>SOME</u>	<u>PAY</u> <u>SOME TO</u>	<u>PAY SIG.</u> <u>MORE TO</u>	<u>(DK/NA)</u>
		<u>CUTS</u>	<u>CUTS</u>	<u>MAIN.</u>	<u>IMPR.</u>	
(SPLIT SAMPLE A ONLY)						
[]k.	(T) Child care and Head Start programs -----	1	2	3	4	5
[]l.	(T) Removal of graffiti -----	1	2	3	4	5
[]m.	(T) Maintenance of public buildings -----	1	2	3	4	5
[]n.	Ensuring current residents are not priced out of the Oakland housing market -----	1	2	3	4	5
[]o.	(T) Addressing abandoned homes and businesses-----	1	2	3	4	5
[]p.	(T) Programs to retain, expand, and attract businesses to Oakland -----	1	2	3	4	5
[]q.	(T) Neighborhood traffic congestion improvements -----	1	2	3	4	5
[]r.	(T) Police protection in your neighborhood -----	1	2	3	4	5
[]s.	(T) Flood prevention and storm drain maintenance -----	1	2	3	4	5

(SPLIT SAMPLE B ONLY)						
[]t.	(T) Emergency medical response -----	1	2	3	4	5
[]u.	(T) Street lighting in your neighborhood -----	1	2	3	4	5
[]v.	(T) Programs at senior centers -----	1	2	3	4	5
[]w.	(T) Housing programs and affordable housing development -----	1	2	3	4	5
[]x.	(T*) Keeping existing professional sports teams -----	1	2	3	4	5
[]y.	Reducing and preparing for climate change -----	1	2	3	4	5
[]z.	(T) Improvements to bicycle, pedestrian, and public transit services/infrastructure-----	1	2	3	4	5
[]aa.	(T) Violence prevention and intervention services-----	1	2	3	4	5
[]bb.	(T) Repair of potholes in city streets and broken sidewalks -----	1	2	3	4	5

NOW I'D LIKE TO ASK YOU ABOUT HOW YOU INTERACT WITH THE CITY OF OAKLAND.

8. Which of the following methods would you most like to be able to use to access programs, information or services provided by the City, such as learning about the City budget, applying for a permit, paying a parking ticket, reporting a pothole, or signing up for a program? **(READ LIST; ACCEPT MULTIPLE RESPONSES)**

- In person ----- 1
- Online through a website ----- 2
- With a mobile app ----- 3
- Texting ----- 4
- On the phone ----- 5
- By email ----- 6
- Through the U-S mail ----- 7
- Other (**SPECIFY**) ----- 8
- (DON'T READ)** DK/NA ----- 9

HERE ARE MY FINAL QUESTIONS. THEY ARE JUST FOR STATISTICAL PURPOSES.

9. **(T)** About how long have you lived in Oakland? **(READ LIST)**

- Less than two years ----- 1
- Two to five years ----- 2
- Six to ten years ----- 3
- 11 to 20 years ----- 5
- 21 to 40 years ----- 6
- 41 years or more ----- 7
- (DON'T READ)** Don't know/Refused ----- 8

10. **(T)** Do you own or rent the house or apartment where you live?

- Own ----- 1
- Rent ----- 2
- (DON'T READ)** Don't know/Refused ----- 3

11. **(T)** Next, what is your marital status: are you married, living with a partner, single, widowed or divorced?

- Married ----- 1
- Living with a partner ----- 2
- Single ----- 3
- Widowed ----- 4
- Divorced ----- 5
- (DK/NA)** ----- 6

12. (T) Are there any children under the age of 18 living in your household?

- Yes ----- 1
- No ----- 2
- (DK/NA)----- 3

13. (T) What is your current employment status? Are you ...? (READ LIST)

- Employed full-time ----- 1
- Employed part-time ----- 2
- Self-employed or work from home----- 3
- A homemaker who does not
work outside the home----- 4
- Retired----- 5
- A student ----- 6
- Unemployed ----- 7
- (DON'T READ) Refused ----- 8

(IF "EMPLOYED FULL TIME" OR "PART TIME" IN Q13, ASK:)

14. (T) Is your work located in the City of Oakland or not?

- In Oakland ----- 1
- Not in Oakland ----- 2
- (DON'T READ) Don't know/Refused ----- 3

(RESUME ASKING ALL RESPONDENTS)

15. Which of the following modes of transportation do you use regularly? (READ LIST, ACCEPT MULTIPLE RESPONSES)

- Driving alone ----- 1
- Carpool ----- 2
- Biking----- 3
- Walking ----- 4
- Riding buses ----- 5
- Riding BART----- 6
- Services like Uber (OO-ber) or Lyft
(LIFT)----- 7
- (DON'T READ) DK/NA/REFUSED ----- 8

16. (T) What was the last level of school you completed?

- High School Graduate or less ----- 1
- Some College----- 2
- Business/Vocational School----- 3
- College Graduate (4) ----- 4
- Post-Graduate Work/Professional
School ----- 5
- (DON'T READ) DK/Refused ----- 6

17. (T) With which racial or ethnic group do you identify yourself: Latino or Hispanic; African American or Black; White or Caucasian; Asian or Pacific Islander; or some other ethnic or racial background?

- Latino/Hispanic ----- 1
- African American/Black ----- 2
- White or Caucasian ----- 3
- Asian/Pacific Islander ----- 4
- (MIXED RACE) ----- 5
- (OTHER) ----- 6
- (DON'T READ) DK/NA/REFUSED ----- 7

(ASK Q18 ONLY IF ASIAN/PACIFIC ISLANDER – CODE 4 – IN Q17)

18. (T) More specifically, would you say that you are: (READ LIST)

- Chinese ----- 1
- Filipino ----- 2
- Indian ----- 3
- Cambodian ----- 4
- Laotian ----- 5
- Pacific Islander ----- 6
- Japanese ----- 7
- Korean ----- 8
- Vietnamese ----- 9
- (MIXED RACE) ----- 10
- (OTHER) ----- 11
- (DON'T READ) DK/NA/REFUSED ----- 12

(RESUME ASKING ALL RESPONDENTS)

19. (T) I don't need to know the exact amount but I'm going to read you some categories for household income. Would you please stop me when I have read the category indicating the total combined income for all the people in your household before taxes in 2016?

- \$30,000 and under ----- 1
- \$30,001 - \$60,000 ----- 2
- \$60,001 - \$75,000 ----- 3
- \$75,001 - \$100,000 ----- 4
- \$100,001 to \$150,000 ----- 5
- \$150,001 and over ----- 6
- (DON'T READ) Refused ----- 7

20. (T) Were you born in the United States or did you immigrate to the United States?

- Immigrated to US ----- 1
- Born in US ----- 2
- (DON'T READ) DK/NA ----- 3

(ASK Q21 ONLY IF CODE 1 IN Q20)

21. (T) In which country were you born? **(RECORD VERBATIM RESPONSE AND CODE AFTERWARDS)**

(ASK IN RDD SAMPLES ONLY)

22. Are you a registered voter in the City of Oakland?

- Yes ----- 1
- No ----- 2
- (DON'T READ) Refused ----- 3**

(ASK IN RDD SAMPLES AND CODE 1 – YES – IN QX ONLY)

23. Are you registered as a Democrat, as a Republican, as a member of another political party, or as having no party preference?

- Democrat----- 1
- Republican----- 2
- Other----- 3
- No party preference ----- 4
- (DON'T READ) Refused ----- 5**

(ASK IN RDD SAMPLE ONLY)

24. Here is my final question. Could you tell me the cross streets of the closest intersection near where you live? **(WRITE IN STREET NAMES)**

_____ and _____

THANK AND TERMINATE

SEX (BY OBSERVATION):

- Male----- 1
- Female----- 2

REGISTRATION (Voter File):

- Democrat----- 1
- Republican----- 2
- No party preference----- 3
- Other----- 4

LANGUAGE OF INTERVIEW:

- English----- 1
- Spanish----- 2
- Chinese----- 3

SAMPLE SOURCE:

- Voter File ----- 1
- Enhanced RDD----- 2

SPLIT:

- A----- 1
- B----- 2

FROM VOTER FILE:

ELECTION FLAGS

P12-----1
G12 -----2
P14-----3
G14 -----4
P16-----5
G16 -----6
Blank -----7

AGE

18-29 -----1
30-39 -----2
40-49 -----3
50-54 -----4
55-59 -----5
60-64 -----6
65-74 -----7
75+-----8

CITY COUNCIL DISTRICT

City Council District 1-----1
City Council District 2-----2
City Council District 3-----3
City Council District 4-----4
City Council District 5-----5
City Council District 6-----6
City Council District 7-----7

DRAFT



2017 City of Oakland Budget Priorities Survey

Key findings from a survey of
Oakland residents conducted on
January 3-12, 2017

320-728

Fairbank, Maslin, Maullin, Metz & Associates – FM3

PUBLIC OPINION RESEARCH & STRATEGY

Survey Methodology

- 1,202 interviews with Oakland adults on cell phones and landlines, conducted in English, Spanish and Chinese
- Half the sample was drawn from registered voter rolls and half using enhanced random-digit dialing (RDD). In the RDD sample, 537 were self-identified voters and 65 were non-voters.
- Unless noted, the results reported are of the combined sample
- The margin of sampling error is +/-2.8% at the 95% confidence interval
- Margins of error for subgroups are higher
- Due to rounding, not all percentages sum to 100%
- Selected comparisons to prior surveys in 2015 (voters only), 2005, 2002 and 2000



Summary & Analysis

- Impressions of Life in Oakland and City Government
- Following the City Budget
- Specific Budget Priorities
- Communication and Transportation
- Appendices (more detailed demographic breakdowns of key perceptions)

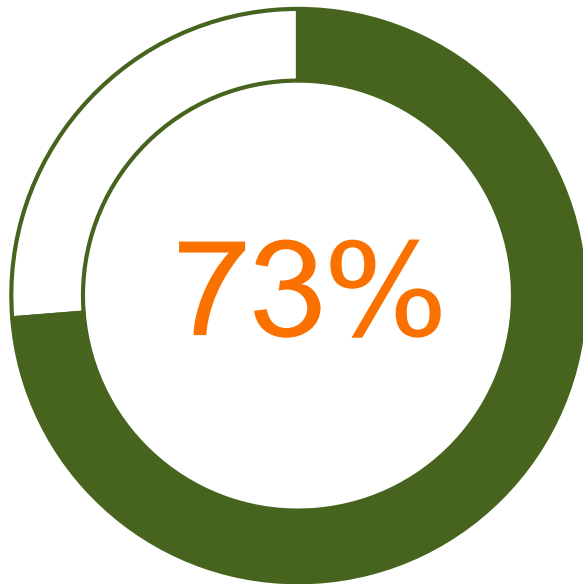




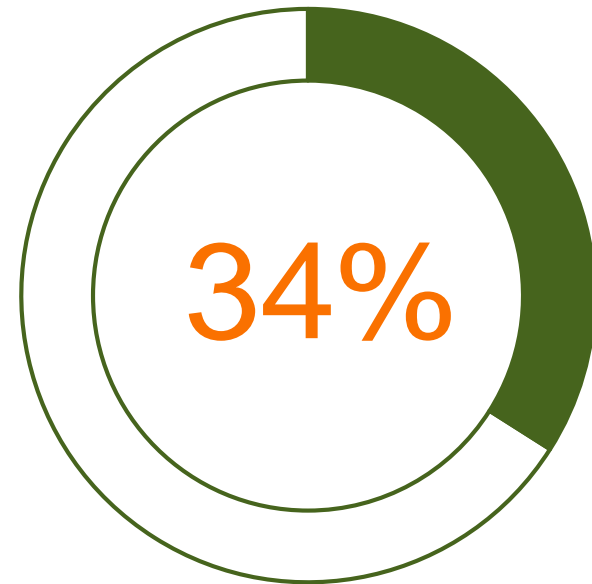
**Impressions of
Life in Oakland and
City Government**

People love living in Oakland, but hold more tepid views of City government.

73% rate Oakland as an “excellent” or “good” place to live

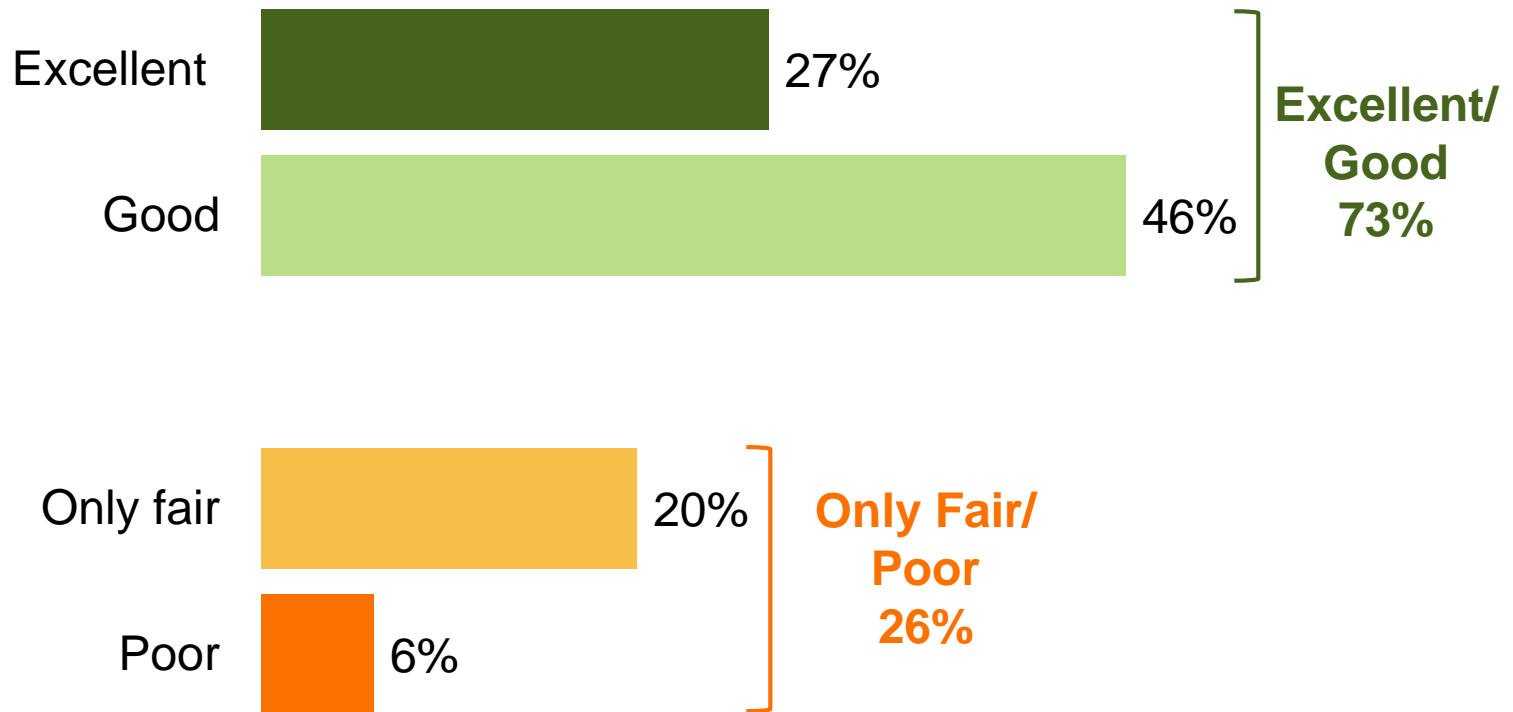


34% rate the City’s provision of services as “excellent” or “good”



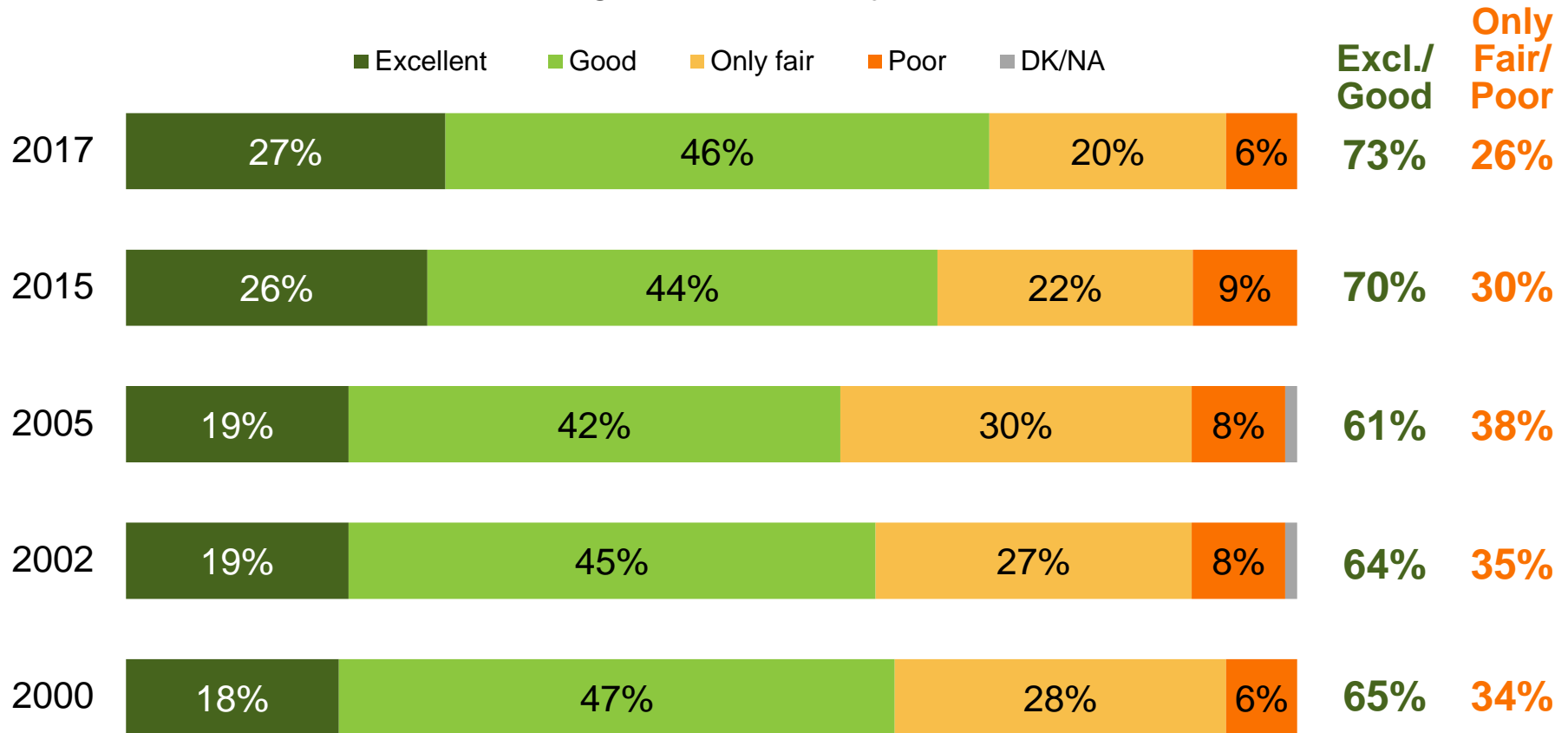
The vast majority of Oaklanders hold positive impressions of the City.

Generally speaking, how would you rate Oakland as a place to live: is it an excellent place to live, a good place, only fair, or a poor place to live?



Impressions of Oakland's quality of life continue to improve.

Generally speaking, how would you rate Oakland as a place to live: is it an excellent place to live, a good place, only fair, or a poor place to live?



East Oakland residents are less likely to give high ratings to their quality of life.



Kalb, District 1



Guillén, District 2



Gibson McElhaney, District 3



Campbell Washington, District 4



Gallo, District 5

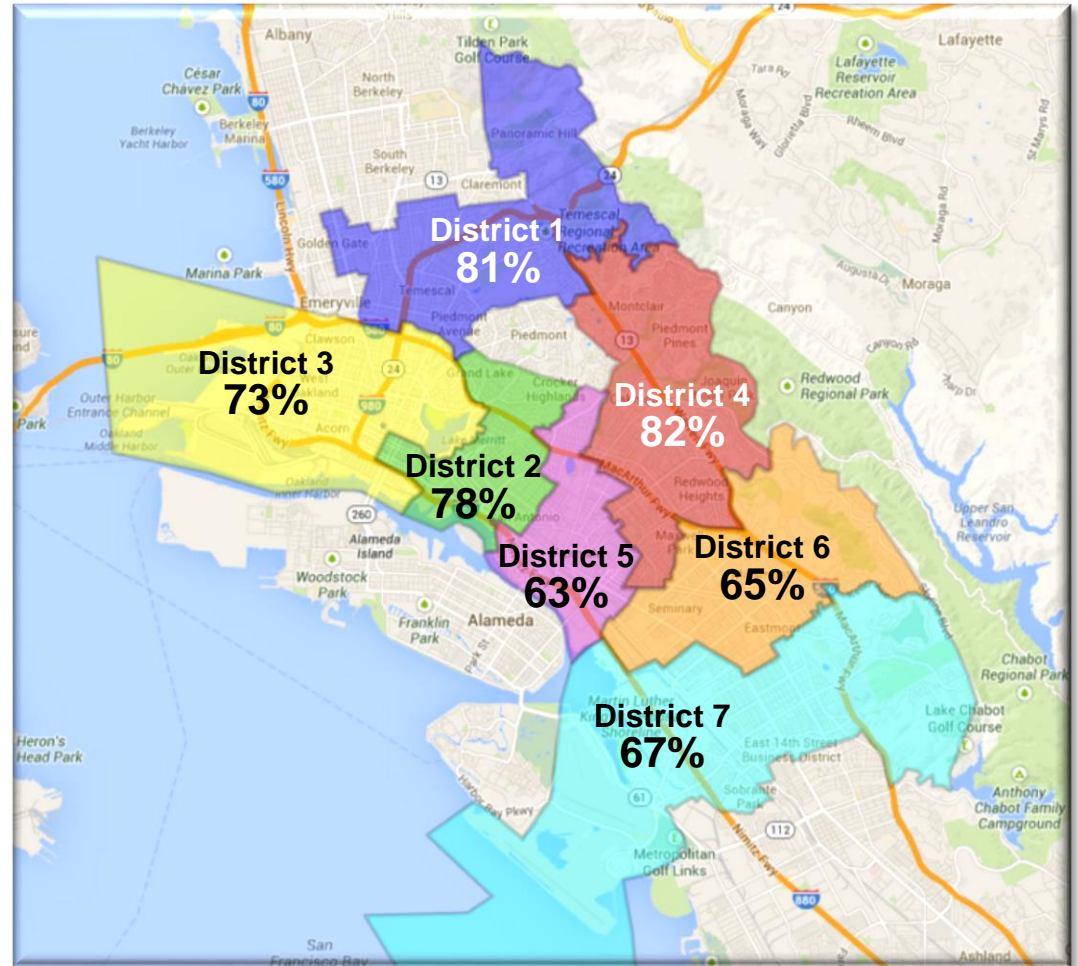


Brooks, District 6



Reid, District 7

Excellent/Good Rating by City Council District



Other Demographic Breakdowns

- Solid majorities of all demographic groups view life in Oakland as “excellent” or “good,” though there are distinctions in intensity.
- 84% of white residents view life in Oakland as “excellent,” while 39% of African-American residents see it as “only fair” or “poor.”
- Views on life in Oakland improve with higher levels of household income and higher levels of educational attainment. (41% of non-college educated women view life in Oakland as “only fair” or “poor.”)
- There are only minor differences by age, but more recent residents are particularly enthusiastic.
- Self-employed residents and those who work at home view life in Oakland particularly positively, too.

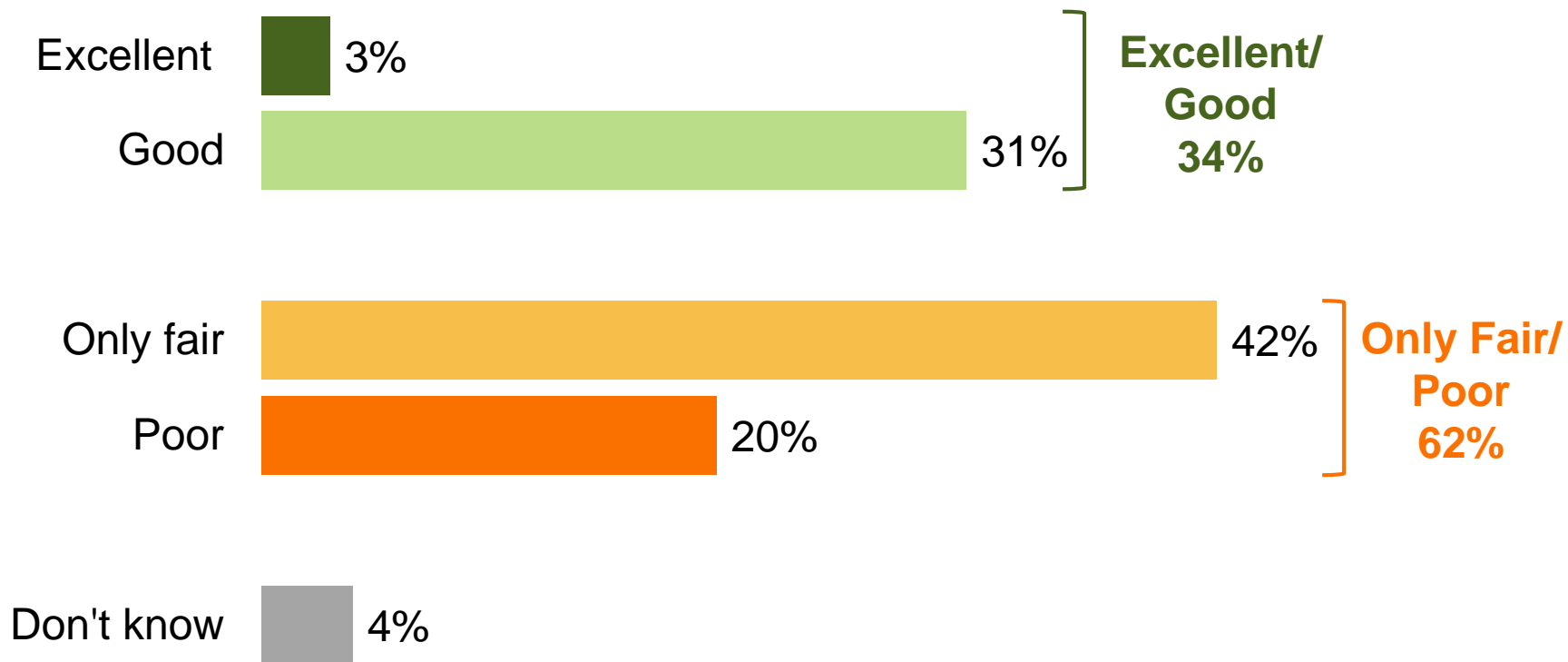


Respondents Most and Least Happy with Life in Oakland

Most likely to respond: Excellent	Most likely to respond: Poor
<i>27% of the Electorate</i>	<i>6% of the Electorate</i>
Regular Bikers	African-Americans
Live with Partner	City Council District 7
HH Income \$100,000+	Ages 18-29
White Residents	City Council District 5
City Council District 1	Non-Voters
Self-employed/Work from Home	Have Children at Home
Post-Graduate Educated	City Council District 6
Regular Uber/Lyft Users	No Party Preference Women
Four-year College Graduates	
City Council District 1	

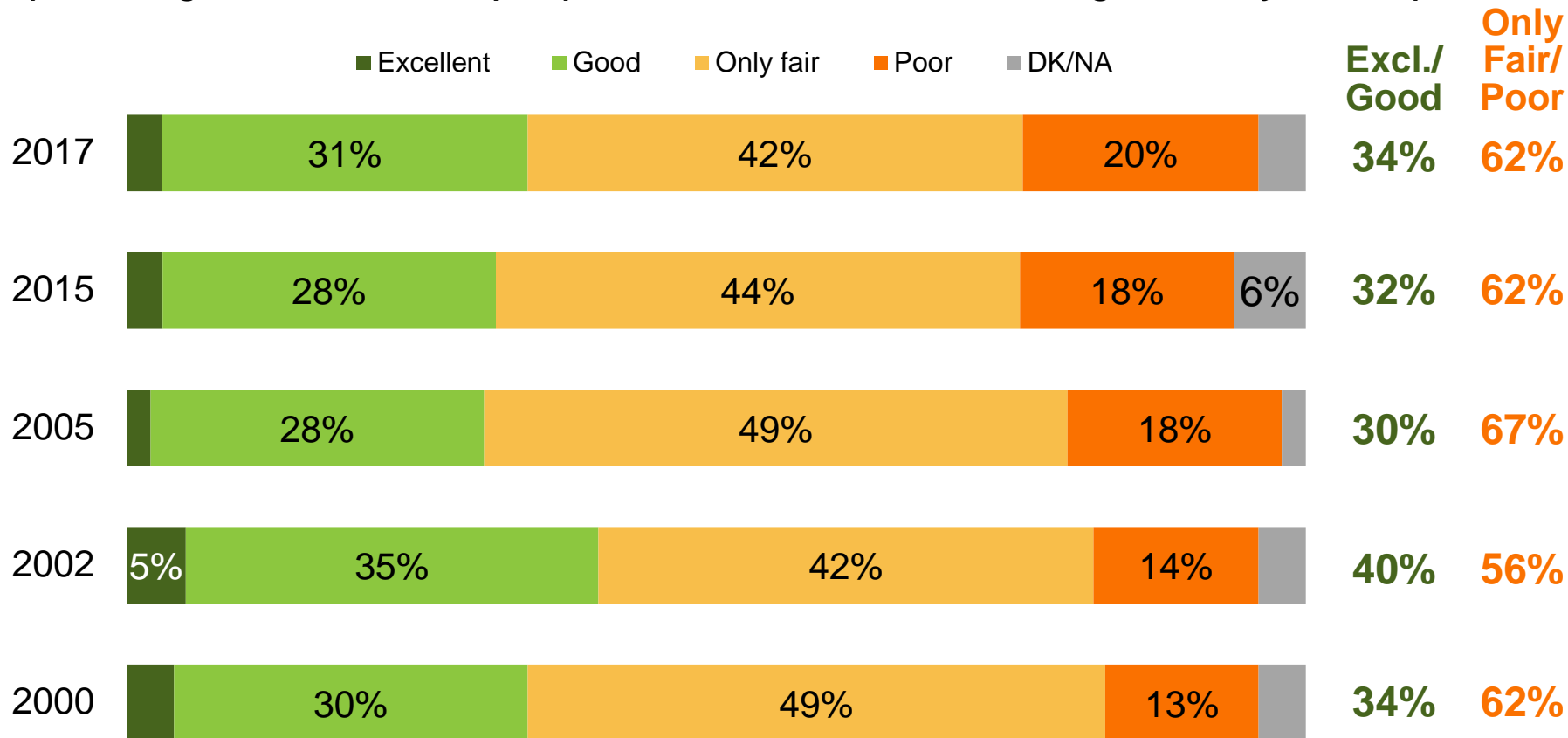
Many feel the City is doing an “only fair” job providing services.

How would you rate the overall job being done by Oakland City government in providing services to the people who live here: excellent, good, only fair or poor?



This perception has held fairly steady for a number of years.

How would you rate the overall job being done by Oakland City government in providing services to the people who live here: excellent, good, only fair or poor?



Again, East Oakland residents have less positive views than their neighbors.



Kalb, District 1



Guillén, District 2



Gibson McElhaney, District 3



Campbell Washington, District 4



Gallo, District 5

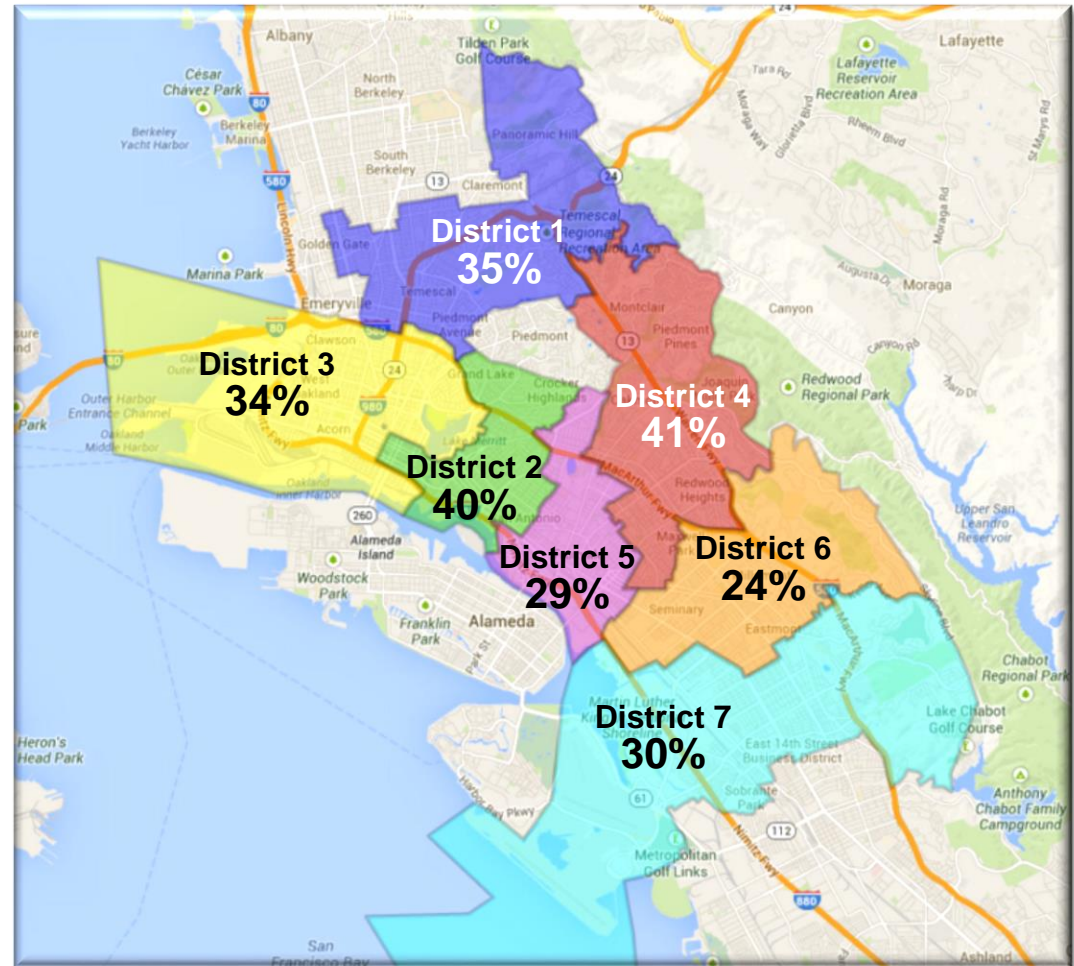


Brooks, District 6



Reid, District 7

Excellent/Good Rating by City Council District



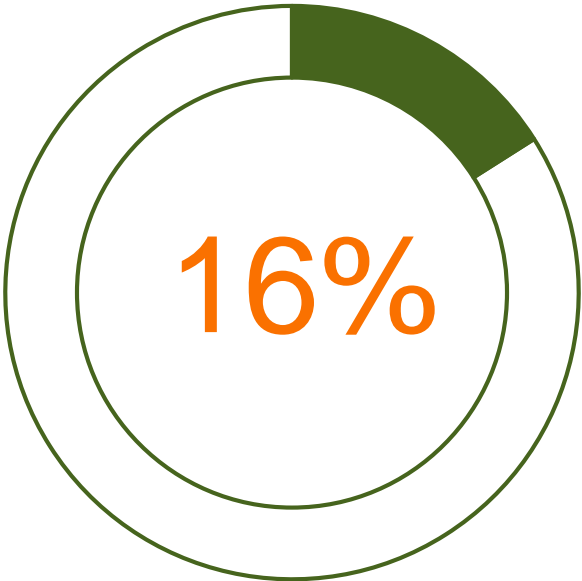
Respondents Most and Least Happy with City Government Services

Most likely to respond: Excellent/Good	Most likely to respond: Poor
34% of the Electorate	20% of the Electorate
White Residents	City Council District 6
Immigrated to U.S.	African-Americans
City Council District 4	Non-College Women
Non-Chinese Asians/Pacific Islanders	Lived 21-40 Years in Oakland
Live with Partner	Republican Men
Post-Graduate Educated	City Council District 3
City Council District 2	Widowed/Divorced
Democratic Men	Interviewed in Spanish or Chinese
Ages 75+	Some College Education
Not Employed	No Party Preference Women
Married/Live with Partner	Republicans
College-Educated Men	Voters of Color
Work in Oakland	HH Income \$30,000-\$60,000
Regular Bikers	Democratic Women
Lived 6-10 Years in Oakland	

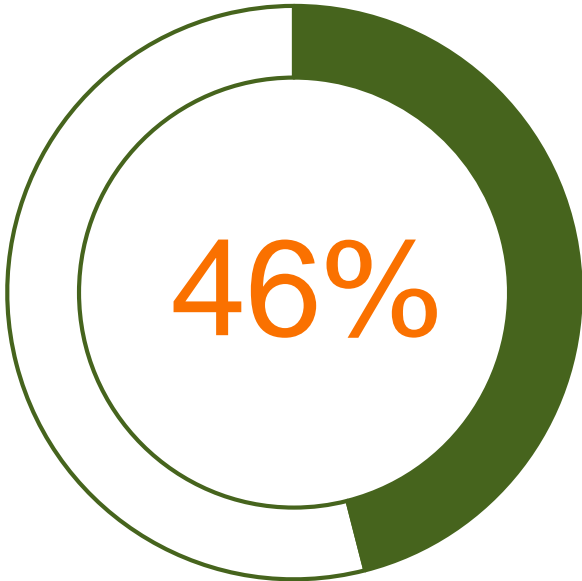
Following the City Budget

Few pay much attention to the City budget, but many say they would like to.

16% follow the City budget “extremely” or “very” closely

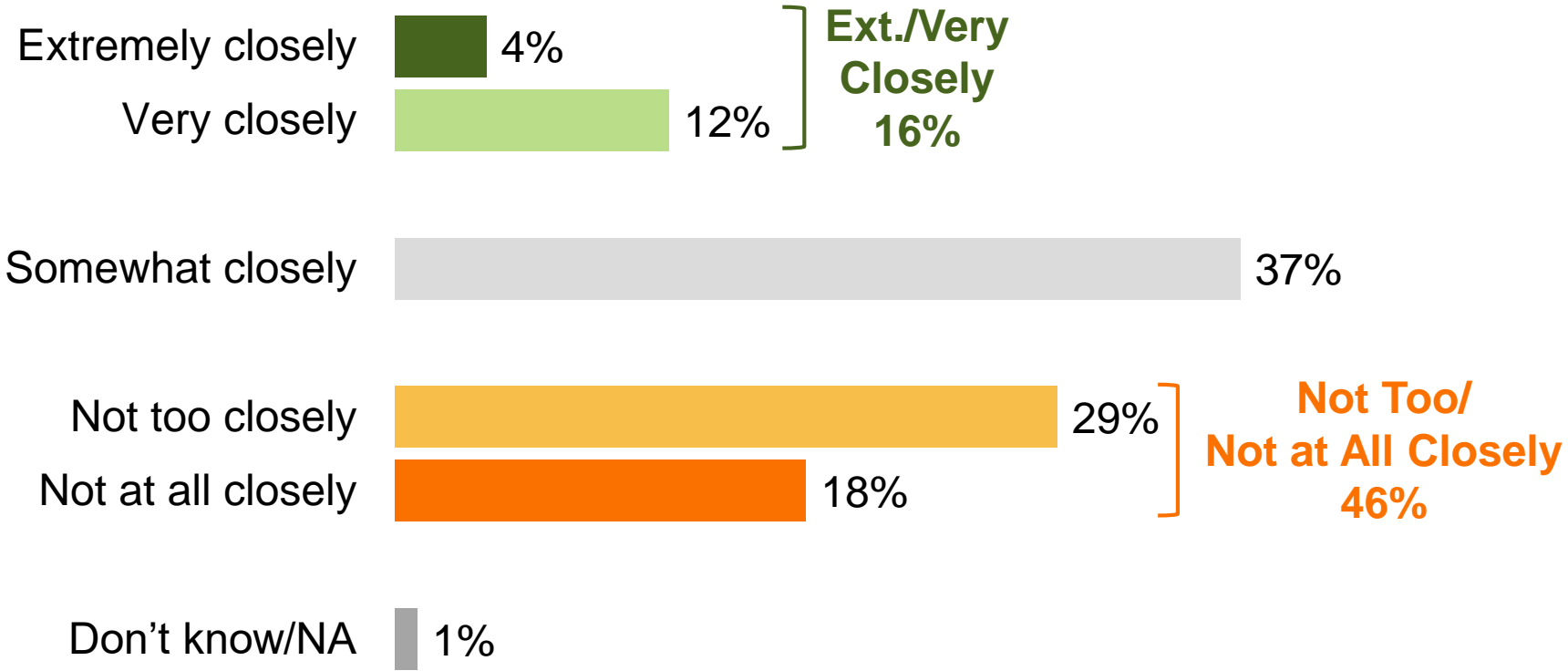


46% claim to be “extremely” or “very” interested in learning more



The majority of Oaklanders admit they pay little to no attention to the budget.

How closely do you follow issues related to the Oakland City budget?



Districts 3 and 6 report the most engagement with budget issues.

Follow the Budget Extremely or Very Closely



Kalb, District 1



Guillén, District 2



Gibson McElhaney, District 3



Campbell Washington, District 4



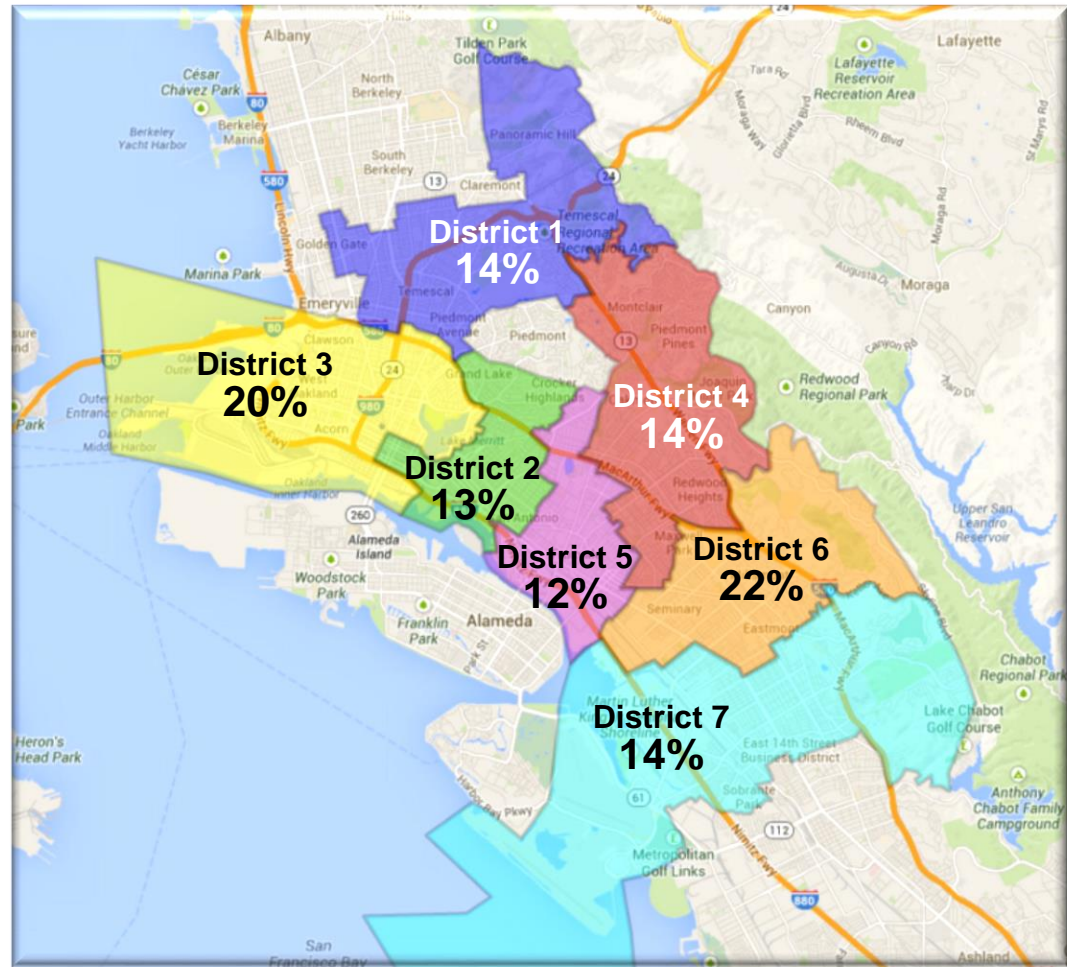
Gallo, District 5



Brooks, District 6



Reid, District 7





Other Demographic Breakdowns

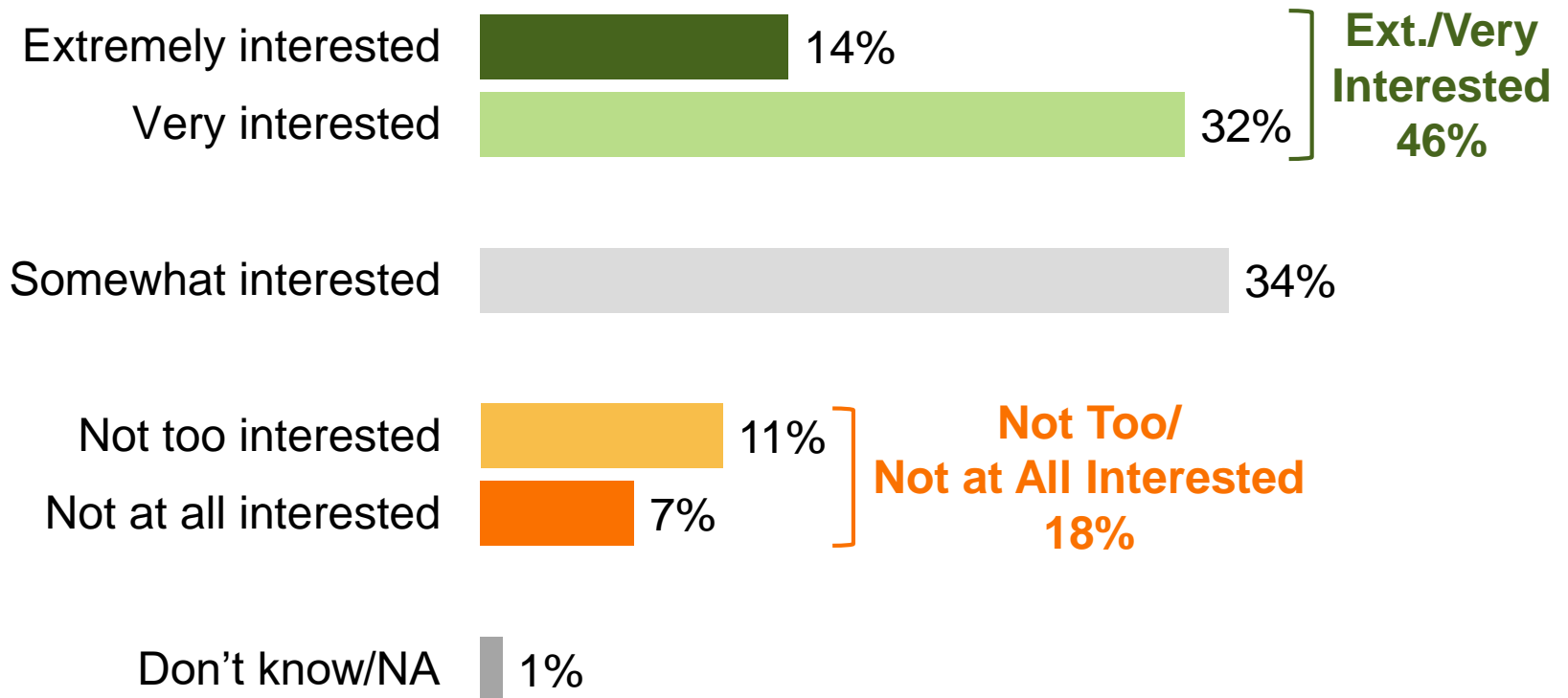
- No subgroup follows the City budget “extremely” or “very” closely more than 22% (CCD 6 and regular carpoolers).
- Those with more intense – positive or negative – views of City services are somewhat more likely to pay attention to the budget.
- Ethnicity doesn’t appear to play a strong role, though Asian/Pacific Islander and immigrant residents are least likely to pay attention.
- Large majorities of residents with the lowest levels of household income (<\$30,000) and educational attainment (high school or less) do not follow the City’s budget.
- Non-voters are also less likely to pay attention to the budget.

Respondents Most and Least Engaged with Budget Issues

Most likely to respond: Extremely/Very Closely	Most likely to respond: Not Too/Not at All Closely
16% of the Electorate	46% of the Electorate
Regular Carpoolers	Non-voters
City Council District 6	High School Educated
Republican Men	Immigrated to U.S.
Lived 21-40 Years in Oakland	Chinese
Ages 50-64	HH Income <\$30,000
Regular Walkers	Total Asians/Pacific Islanders
Men Ages 50+	Ages 75+
City Council District 3	Permanent Absentee Voters
No Party Preference Women	Not Employed
Live with Partner	Renters
	Ages 30-39
	Lived 0-5 Years in Oakland
	City Council District 1
	No Party Preference Men

However, nearly half say they are quite interested in how the City spends money.

How interested are you in learning more about Oakland's City budget and how its funds are allocated?



Interest is especially high in District 6.



Kalb, District 1



Guillén, District 2



Gibson McElhaney, District 3



Campbell Washington, District 4



Gallo, District 5

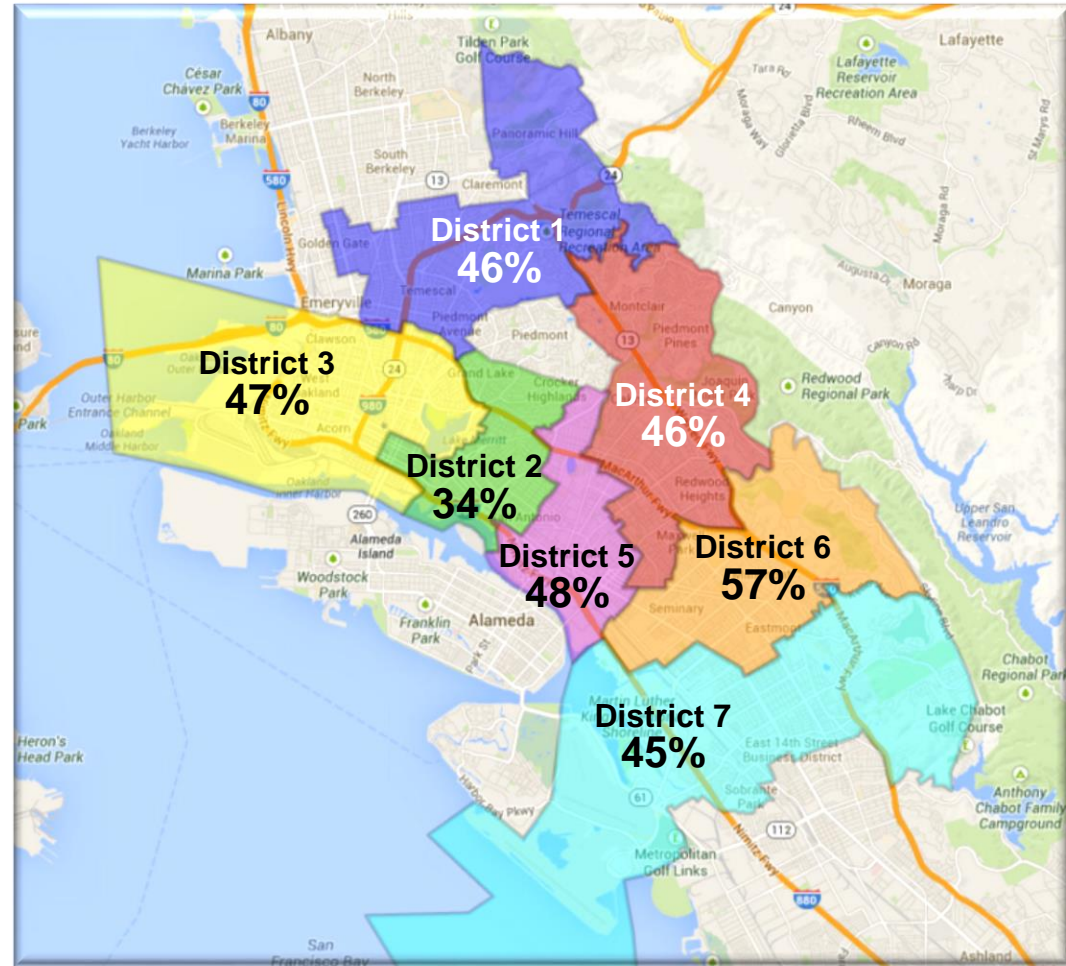


Brooks, District 6



Reid, District 7

Extremely or Very Interested in the Budget

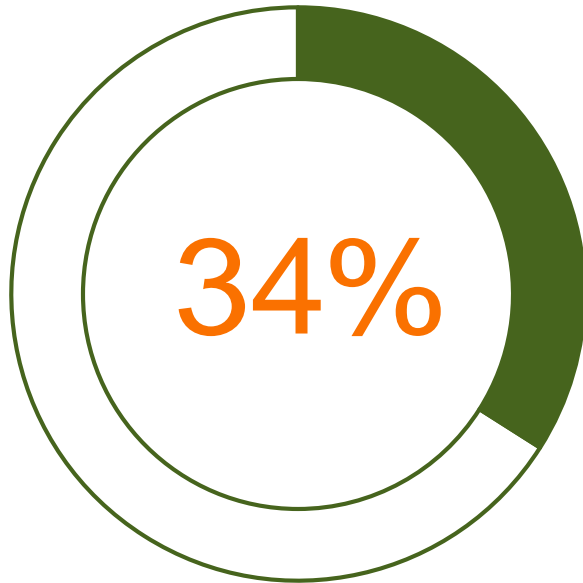


Respondents Most and Least Interested in Budget Issues

Most likely to respond: Extremely/Very Interested	Most likely to respond: Not Too/Not at All Interested
46% of the Electorate	18% of the Electorate
City Council District 6	Non-Voters
Regular BART Riders	Chinese
HH Income \$100,000+	High School Educated
Regular Carpoolers	Republicans
No Party Preference Women	Ages 75+
Republican Men	Ages 65-74
Ages 40-49	Retired
Regular Uber/Lyft Users	Lived 41+ Years in Oakland
Regular Transit Riders	City Council District 2
Post-Graduate Educated	Not Employed

Taken together...

34% say they are “extremely” or “very interested” in budget issues, but follow them “somewhat,” “not too” or “not at all closely.”



Those disproportionately likely to hold this combination of views are:

- Recent City residents
- Non-English speakers
- City Council District 6 residents
- High-income households
- Women under 50

Specific Budget Priorities



Assessing Oaklanders' Budget Priorities

Budget priorities were assessed in three ways:

1. In their own words, what two issues would they like most to see prioritized in the City budget?
2. How would each respondent divide a \$100 budget among five distinct *goals*?
3. For a list of specific *services and programs*, would they prefer to make cuts to help balance the budget, or pay more in taxes or fees to maintain it?



Key Findings

- Broadly, housing costs, public safety, and jobs/economic development are seen as the top priorities for City investment.
- However, there are few things residents would prefer to see cut specifically – except efforts to keep sports teams.
- Oaklanders are about half as likely as they were in 2015 to prefer cuts to many programs and services over paying more.

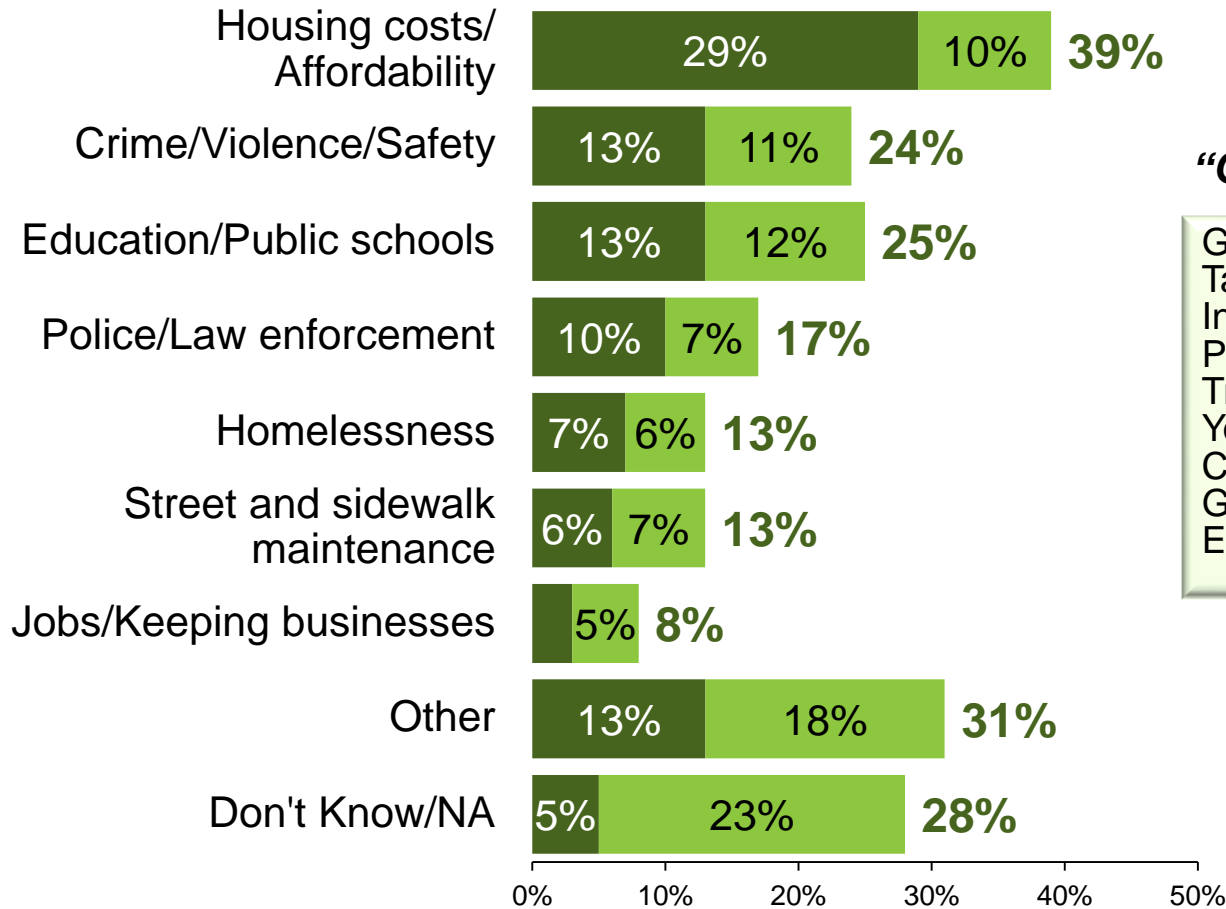


Housing is residents' clear top priority.

In the upcoming two-year budget, what are the two most important issues facing Oakland residents that you would like to see prioritized in the City government budget?

(Open-Ended)

■ 1st Choice ■ 2nd Choice





“Other” includes in part:

- Government waste/inefficiency
- Taxes too high
- Infrastructure
- Public transportation/Buses
- Traffic congestion/Traffic flow
- Youth activities
- Cleaner city
- Gentrification
- Environment

Housing outpaced public safety & education, two historical top concerns.

(1st Choice; 3% and Above Shown)

Issues	2000	2002	2005	2015	2017
Housing costs/Affordability	8%	12%	5%	10%	 29%
Crime/Violence/Safety	19%	26%	22%	20%	 13%
Education/Public schools	33%	14%	35%	17%	13%
Police/Law enforcement	NA	2%	2%	10%	10%
Homelessness	3%	4%	2%	2%	7%
Street and sidewalk maintenance	3%	4%	4%	8%	6%
Jobs/Keeping businesses	5%	3%	4%	7%	3%

Concern about housing affordability is most acute in West and North Oakland.



Kalb, District 1



Guillén, District 2



Gibson McElhaney, District 3



Campbell Washington, District 4



Gallo, District 5

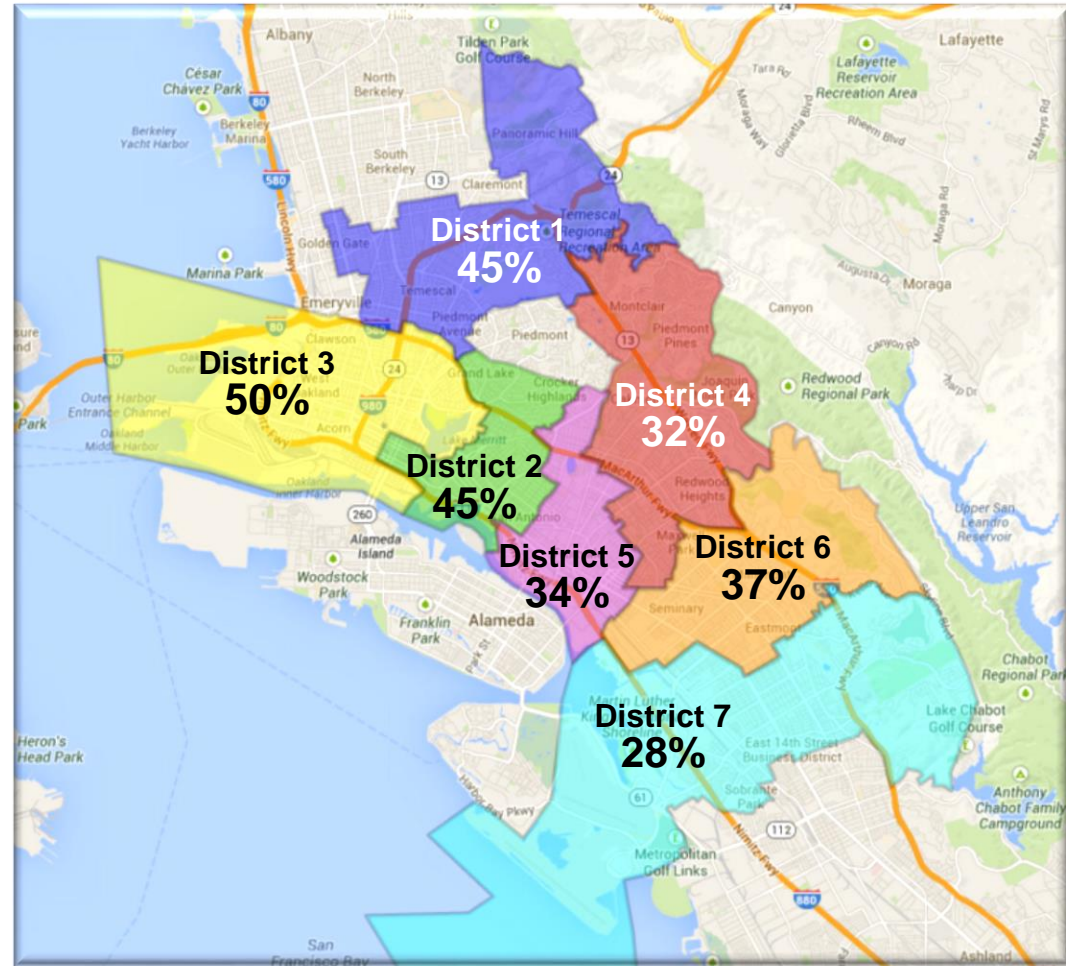


Brooks, District 6



Reid, District 7

“Housing Costs” Named a Top Priority



Residents expressed concern about policing distinct from crime response.

I would like to see training for the police so they do not run around and shoot people.

I would like the police force to not be so scary.

I want a police force that's less racist.

- A significant minority of respondents mentioned police-community relations.
- The announcement of Chief Kirkpatrick's appointment came on the second night of interviews.
- Overall, however, comments about the police force stressed the need for additional officers to respond to concerns about public safety.

Asked to allocate a \$100 budget, safety is the clear top priority.

I am going to ask you to imagine you are in charge of Oakland's City budget. The City of Oakland has 5 major priority goals and I would like you to tell me how you would prioritize City spending to achieve these goals. For this exercise, assume you have \$100 dollars to spend on all five. Please tell me how many dollars out of \$100 you would spend on each goal, keeping in mind that the total must add up to \$100.



A safe city

A sustainable, prosperous economy that creates quality jobs

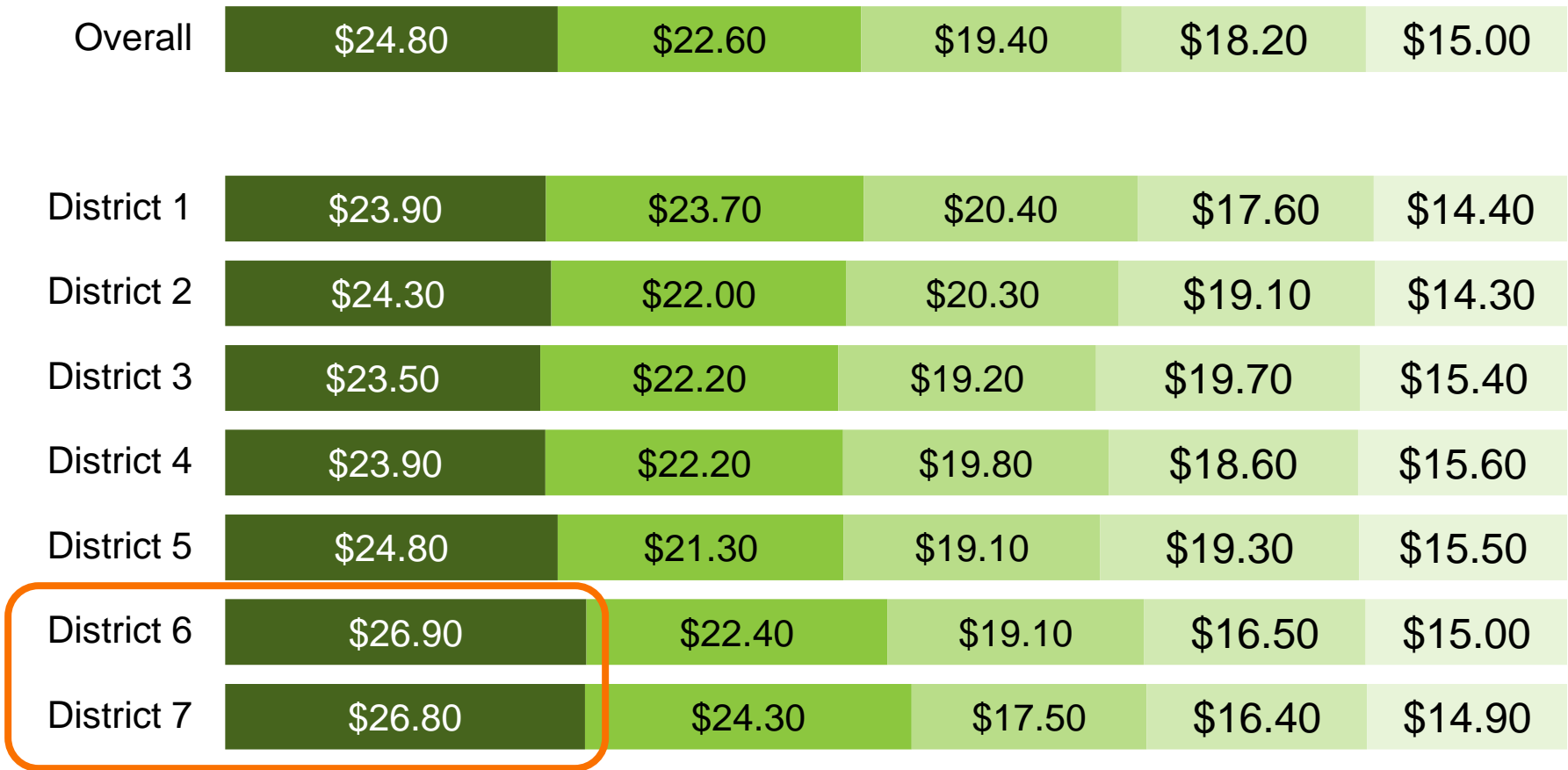
Competent and effective delivery of City services

A just, equitable and diverse community

An attractive vibrant community

Safety is a higher priority in Districts 6 and 7, in East Oakland.

■ Safe City ■ Creates Quality Jobs ■ City Services ■ Equitable and Diverse Community ■ Attractive Vibrant Community



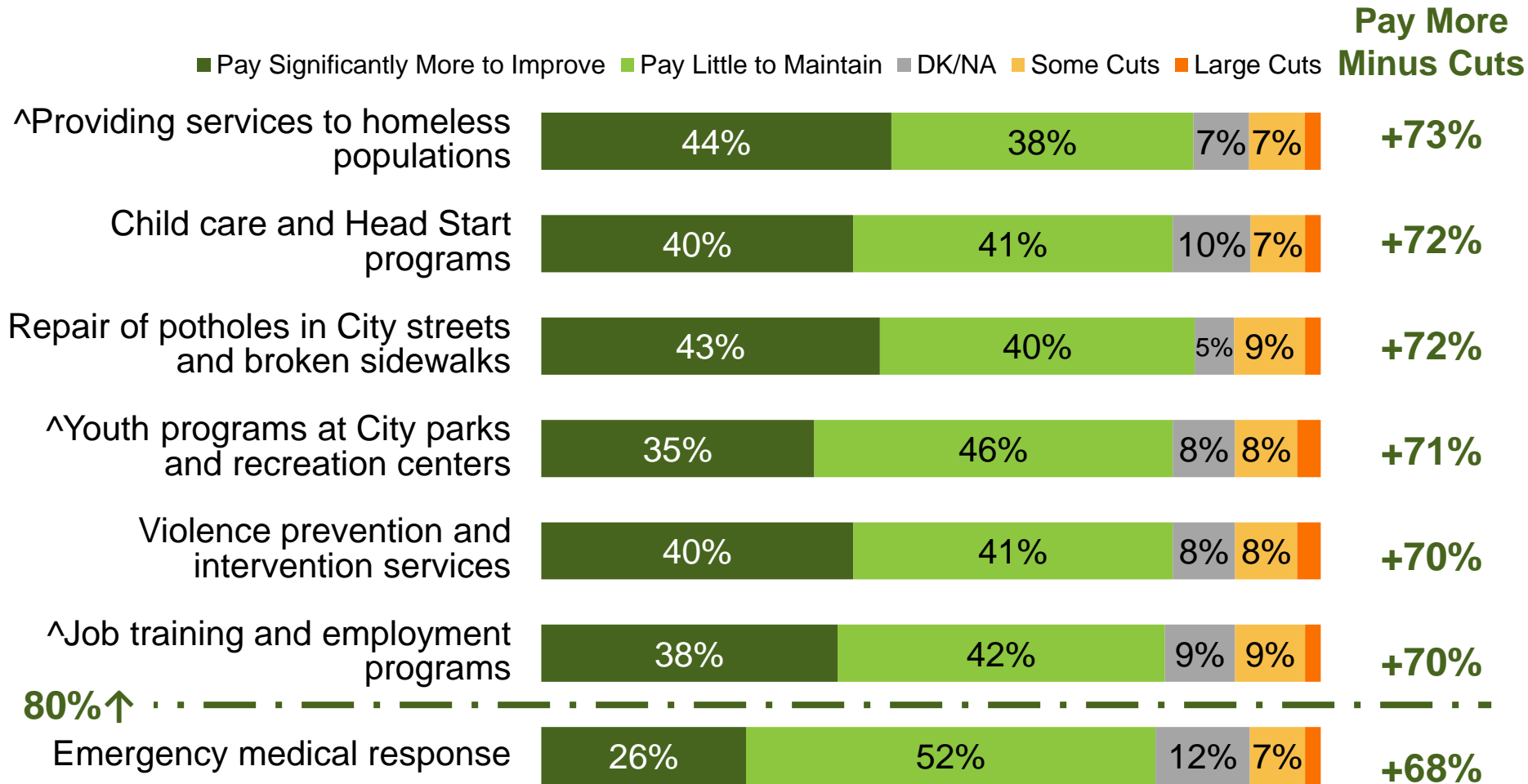
Q6. I am going to ask you to imagine you are in charge of Oakland's City budget. The City of Oakland has 5 major priority goals and I would like you to tell me how you would prioritize City spending to achieve these goals. For this exercise, assume you have \$100 dollars to spend on all five. Please tell me how many dollars out of \$100 you would spend on each goal, keeping in mind that the total must add up to \$100.

Demographic Breakdowns

- ✓ Those who rate the City's service provision or quality of life higher are more likely to prioritize "an attractive, vibrant community."
- ✓ Homeowners and those earning more than \$100,000 annually allocate \$26.40 to "a safe city," compared with \$23 from renters. By contrast, renters would spend \$4 more than homeowners on a "just, equitable, and diverse community." Asian/Pacific Islanders are also especially interested in that priority for the City.
- ✓ Residents of Districts 6 and 7 put nearly \$27 toward "a safe city." In District 1, nearly equal shares were allocated to safety and jobs.

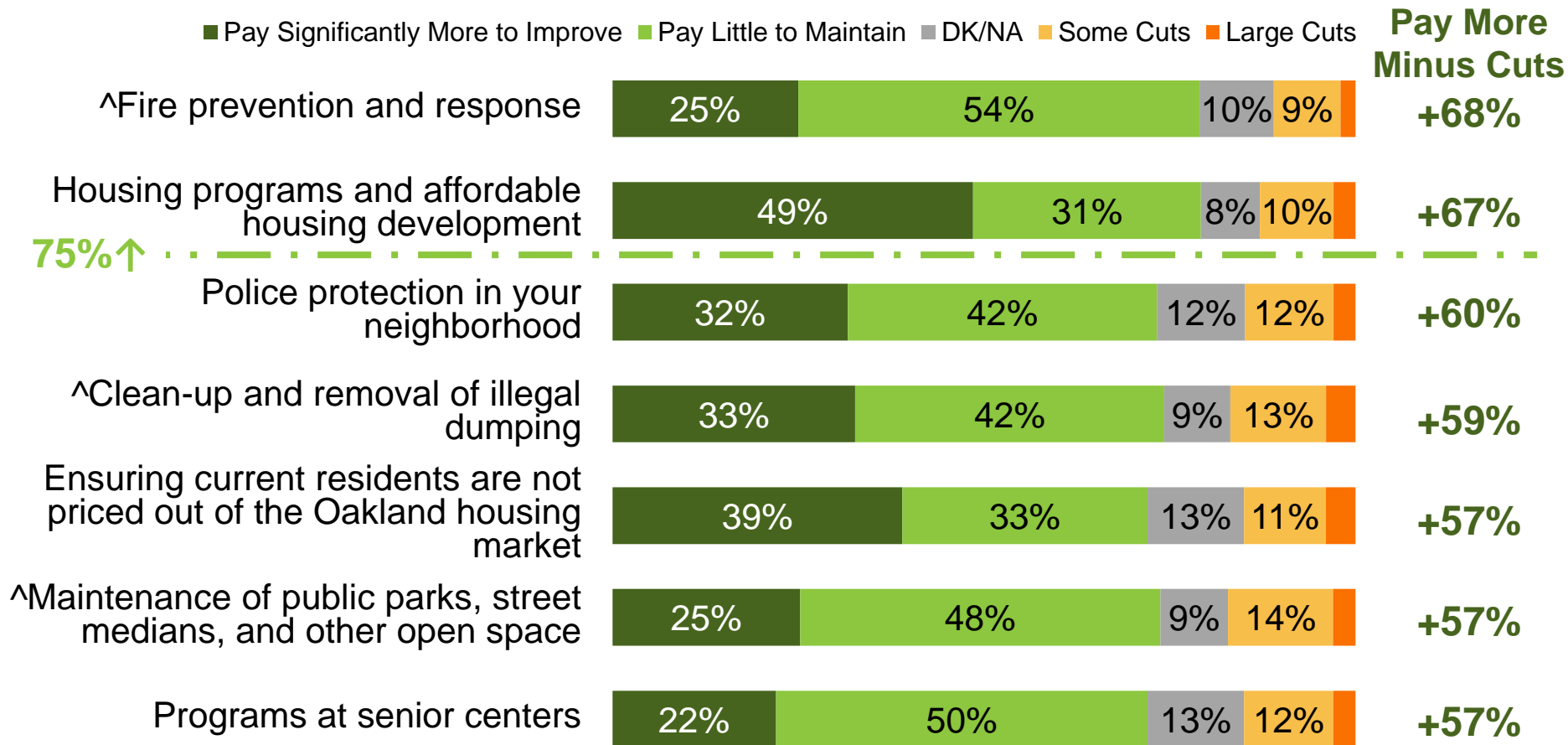


Very few Oaklanders would make cuts to homeless, child services, or streets.



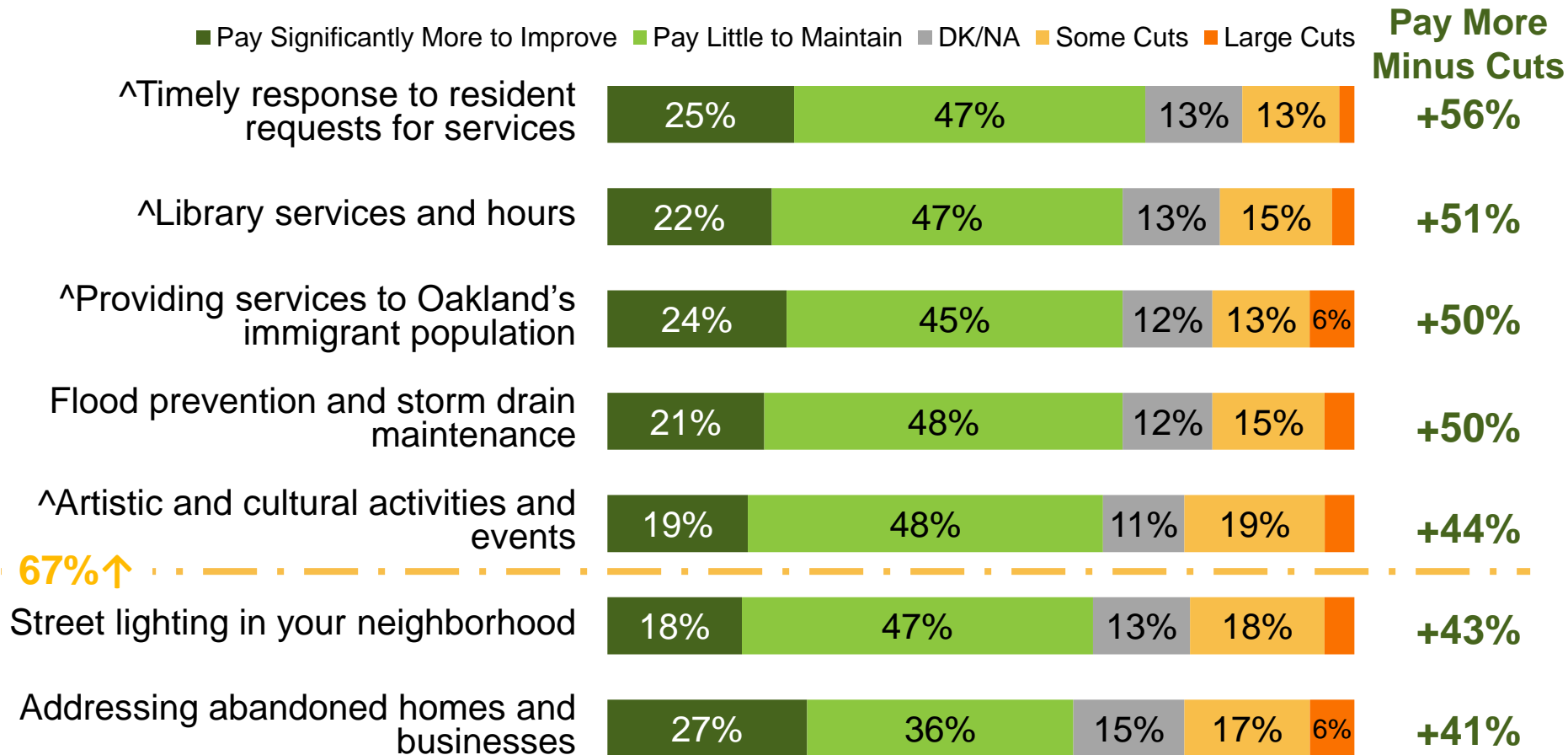
Q7 e/h/j/k/t/aa/bb. I am going to mention some of the services the City provides its residents. Every two years, the City faces hard choices about these services in order to balance its budget. Please tell me whether you think cuts should be made to that service in order to balance the budget, or whether you would be willing to pay additional taxes or fees to maintain or improve that service. ^Not Part of Split Sample

Nearly half would pay significantly more to improve affordable housing.



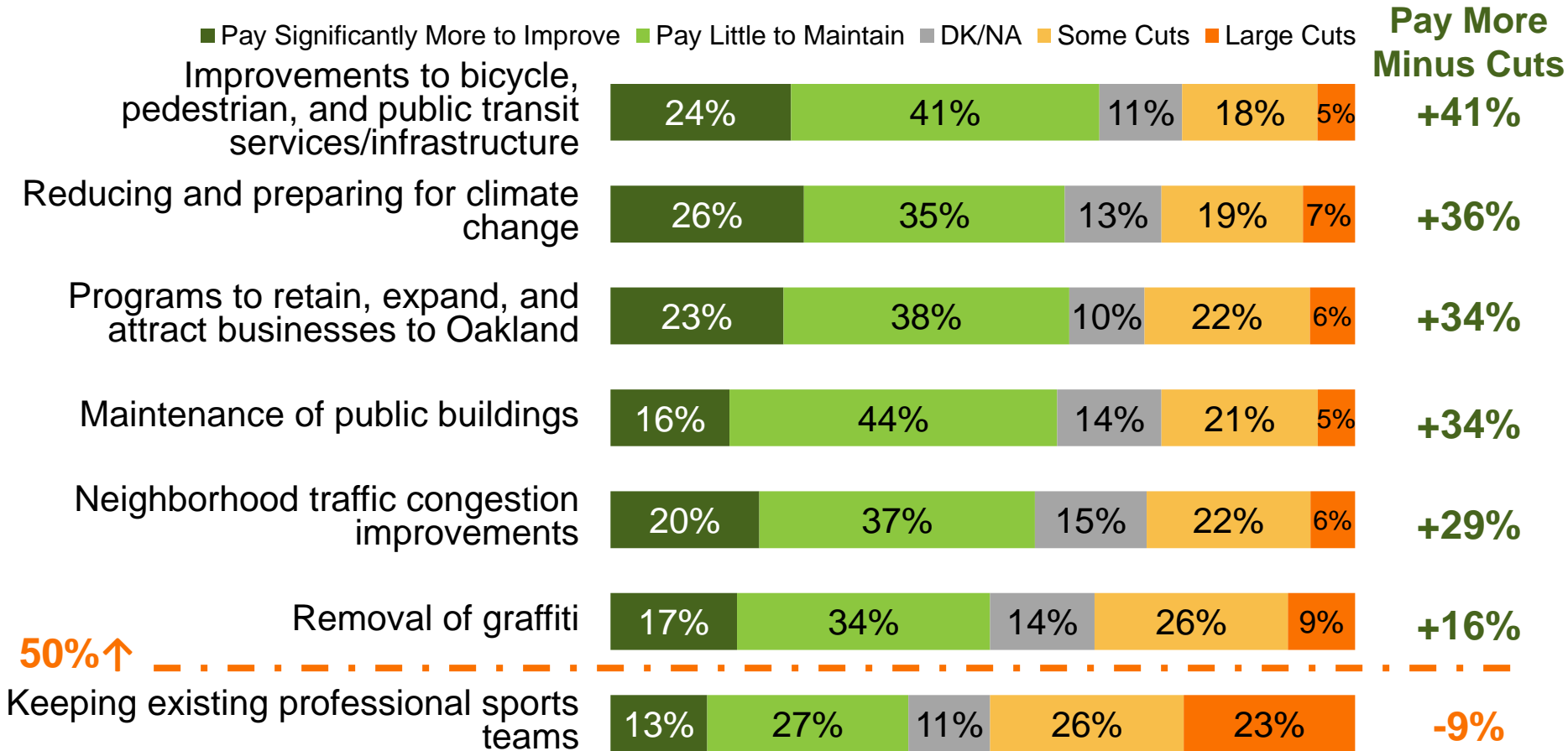
Q7 b/g/i/n/r/v/w. I am going to mention some of the services the City provides its residents. Every two years, the City faces hard choices about these services in order to balance its budget. Please tell me whether you think cuts should be made to that service in order to balance the budget, or whether you would be willing to pay additional taxes or fees to maintain or improve that service. ^Not Part of Split Sample

There is less intensity around things like street lighting and storm drains.



Q7 a/c/d/f/o/s/u. am going to mention some of the services the City provides its residents. Every two years, the City faces hard choices about these services in order to balance its budget. Please tell me whether you think cuts should be made to that service in order to balance the budget, or whether you would be willing to pay additional taxes or fees to maintain or improve that service. ^Not Part of Split Sample

The only priority that more would see cut than not is keeping sports teams.



Q7 l/m/p/q/x/y/z. am going to mention some of the services the City provides its residents. Every two years, the City faces hard choices about these services in order to balance its budget. Please tell me whether you think cuts should be made to that service in order to balance the budget, or whether you would be willing to pay additional taxes or fees to maintain or improve that service. ^Not Part of Split Sample



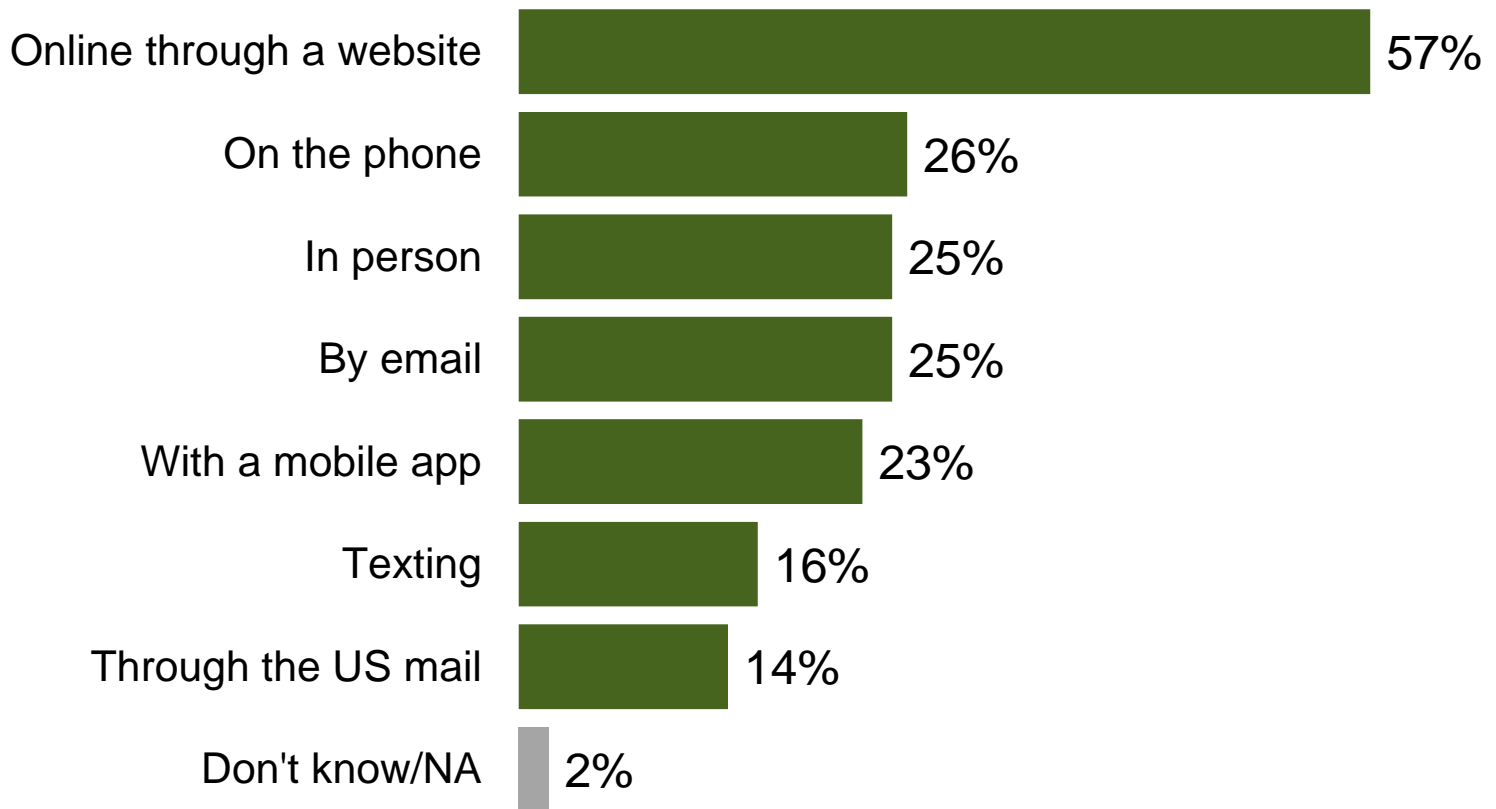
Demographic Breakdowns

- ✓ More than half of African-Americans say they would pay *significantly* more to provide homeless services; a similar share of Chinese residents would invest more in Head Start.
- ✓ Oakland residents who are not registered voters are more than twice as likely to say they would accept cuts to programs limiting displacement; they are much more likely to say they would invest in more police protection.
- ✓ District 5 residents are much less likely to say cuts to traffic improvements are acceptable. Significant majorities in Districts 1 and 6 would invest much more in affordable housing development.
- ✓ Nearly two-thirds of those who have lived in Oakland fewer than 5 years say they are willing to see cuts to efforts to attract sports teams.

Accessing Services & Information

Residents largely prefer to interact with the City on digital platforms.

Which of the following methods would you **most like to be able to use** to access programs, information, or services provided by the City, such as learning about the City budget, applying for a permit, paying a parking ticket, reporting a pothole, or signing up for a program?



Demographic Breakdowns



- ✓ Using a website appealed to Oaklanders in nearly every major demographic group. Those who were disproportionately likely to say they prefer that method were high-income, highly educated and newcomers to Oakland.
- ✓ Wealthy residents, those in their 30s, and newcomers to Oakland are disproportionately likely to say they would use an app to connect.
- ✓ Older, African-American, and lower-income residents are more likely to prefer in-person interactions than other groups. Older and long-term residents, retirees and African-Americans are more likely to prefer phone or mail.
- ✓ Asian/Pacific Islanders stand out as among the most likely to prefer email.

Conclusions

Conclusions

- ✓ As has been a familiar dynamic, Oakland residents love living in the City (even more so than before), but continue to feel pretty mixed about City services.
- ✓ While few feel the City is doing a poor job providing services, most feel there is clearly room for improvement.
- ✓ That being said, very few pay much particular attention to Oakland's City budget, though many claim they would like to learn more about the City's spending priorities.
- ✓ In terms of City spending, while public safety remains a top priority, concerns about housing affordability have spiked. Residents also would like to see investment in economic development.
- ✓ When faced with a choice, residents are more open than they were in 2015 to paying more to maintain a variety of City services, rather than making service cuts.

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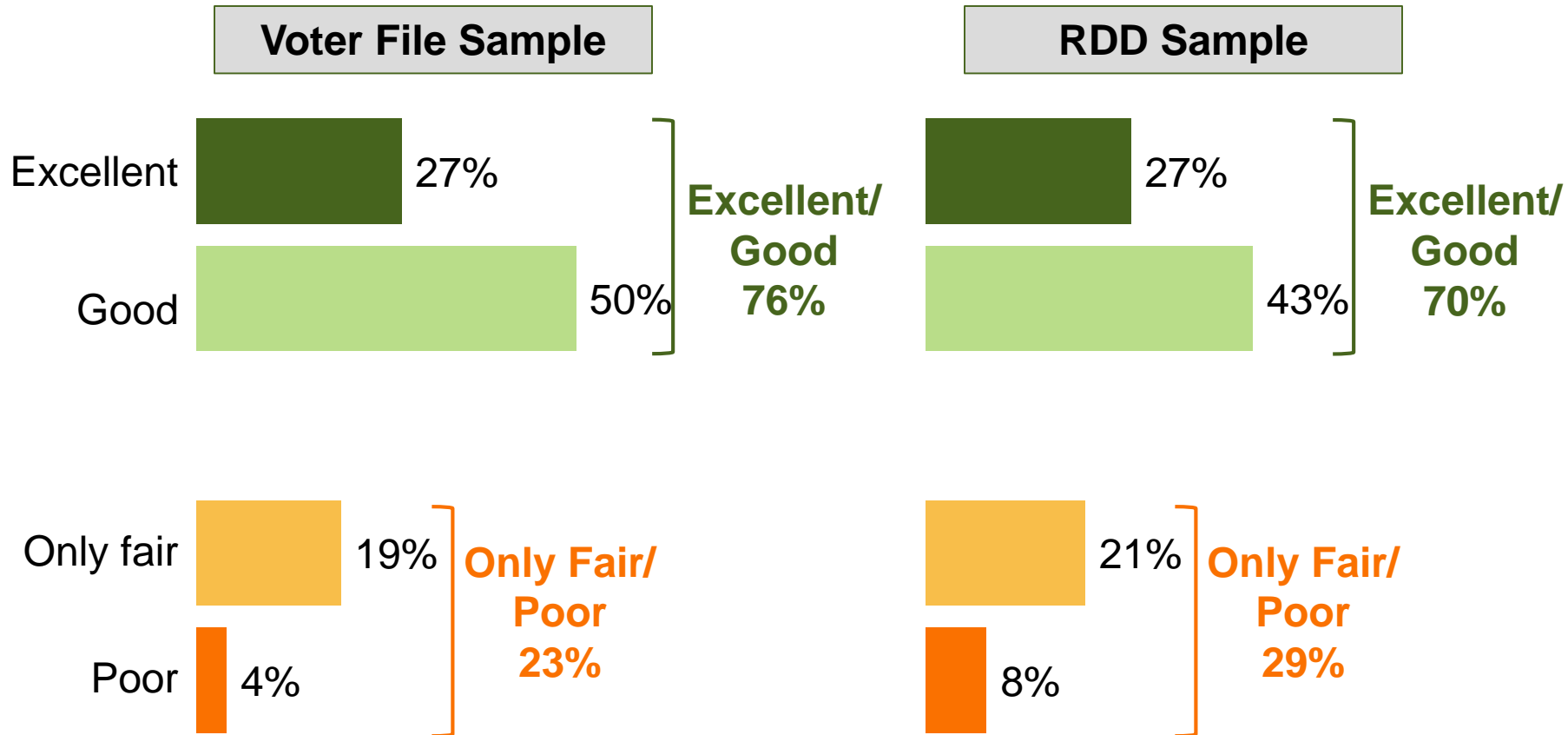
Fairbank, Maslin, Maullin, Metz & Associates – FM3

PUBLIC OPINION RESEARCH & STRATEGY

**Appendix:
Selected Results by
Demographic Group**

The sample of residents gave slightly lower ratings to quality of life.

Generally speaking, how would you rate Oakland as a place to live: is it an excellent place to live, a good place, only fair, or a poor place to live?

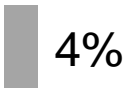
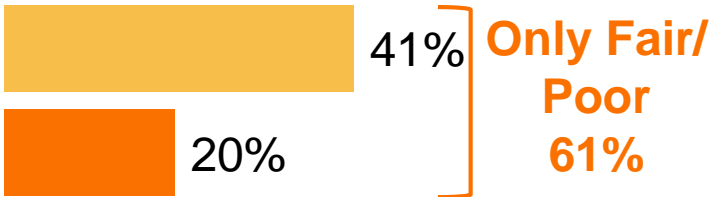
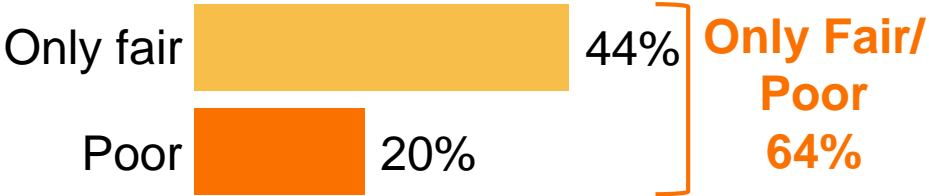
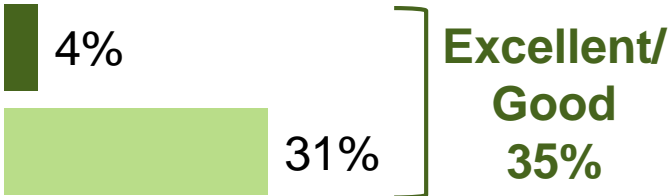


There is no strong difference between resident and voter samples on services.

How would you rate the overall job being done by Oakland City government in providing services to the people who live here: excellent, good, only fair or poor?

Voter File Sample

RDD Sample

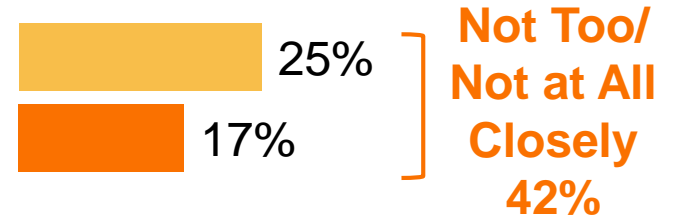
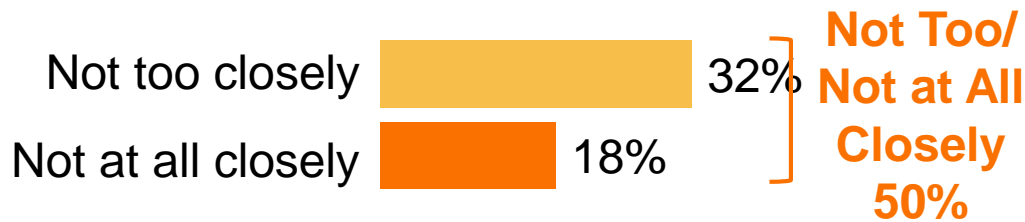
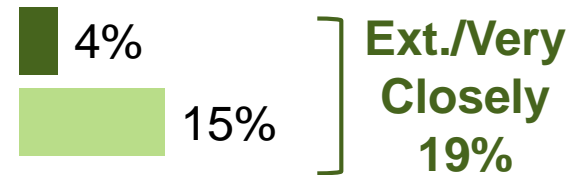
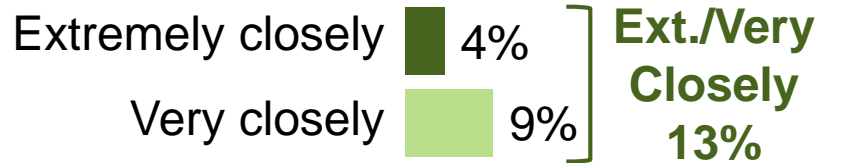


The sample of voters was less likely to say they follow the budget closely.

How closely do you follow issues related to the Oakland City budget?

Voter File Sample

RDD Sample



Don't know/NA | 1%

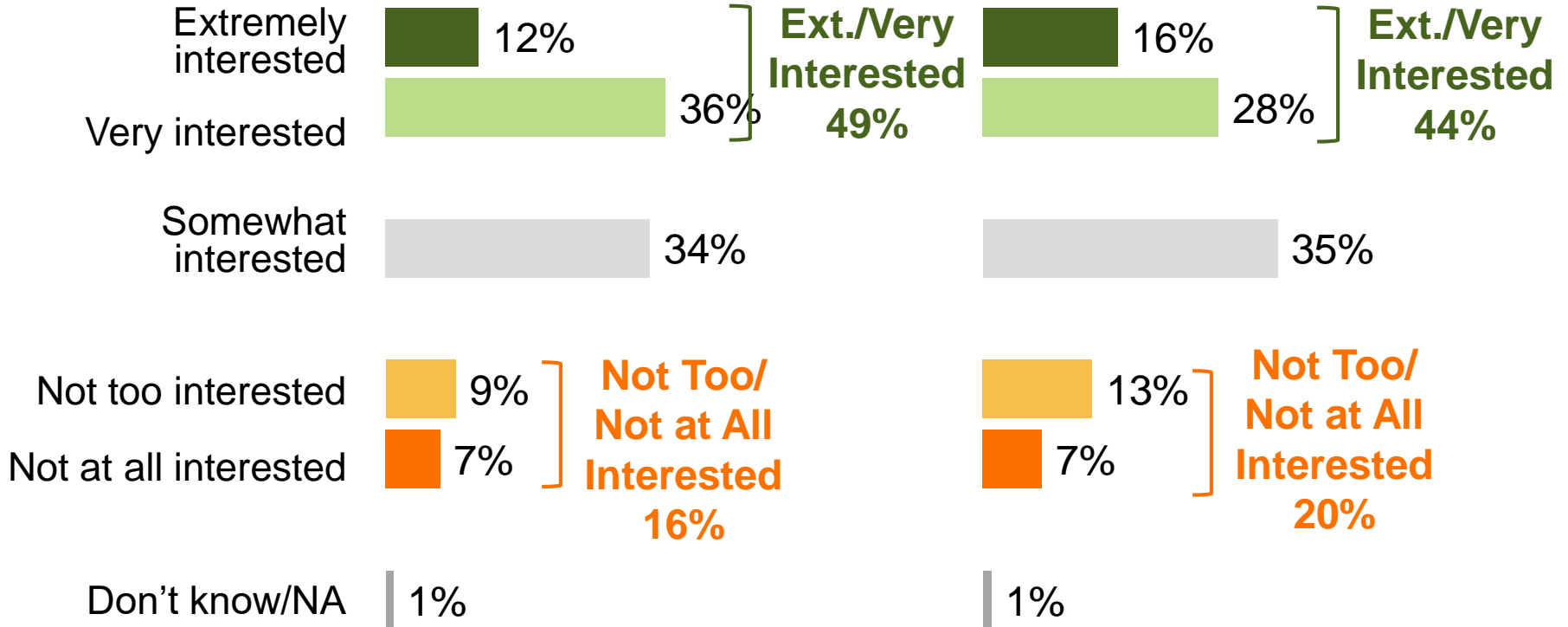
| 1%

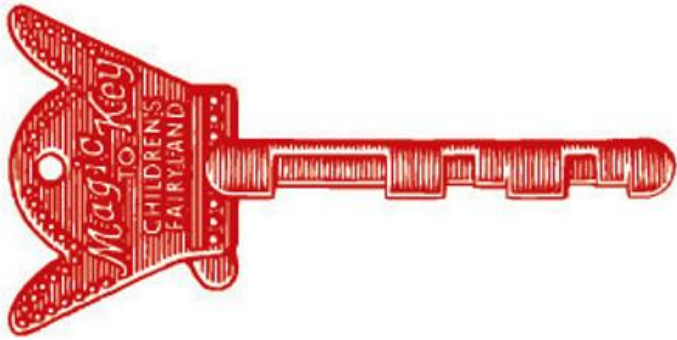
However, the sample of voters reported slightly higher interest in the budget.

How interested are you in learning more about Oakland's City budget and how its funds are allocated?

Voter File Sample

RDD Sample



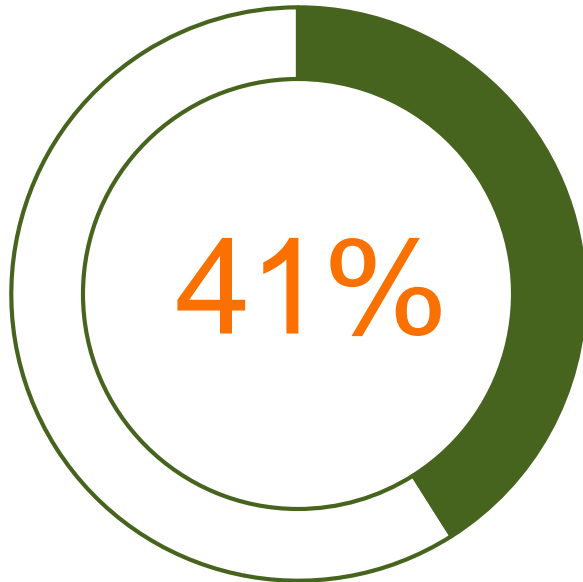


Other Demographic Breakdowns

- Pluralities of most subgroups give the City “only fair” ratings.
- The most positive subgroup is non-Chinese Asian/Pacific Islanders (47% think the City is doing a “excellent” or “good” job providing services); the most negative is City Council District 6 (35% “poor”).
- Those with the most positive overall views of life in Oakland give the City the most positive ratings.
- Those who follow the City budget more closely are slightly more negative about the City’s provision of services.
- While income doesn’t appear to shape perception, education appears to have a slight impact, with post-graduate educated residents viewing City services a little more positively and non-college educated women a little more negatively.

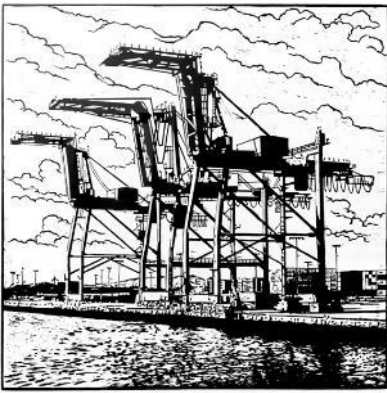
Taken together...

41% rate Oakland as an “excellent” or “good” place to live, but rate City services as “only fair” or “poor.”



Those disproportionately likely to hold this combination of views are:

- Upper-income/education
- Recent City residents
- Either don't work in Oakland or are self-employed/work from home
- City Council District 1
- Regular bikers or bus riders



Other Demographic Breakdowns

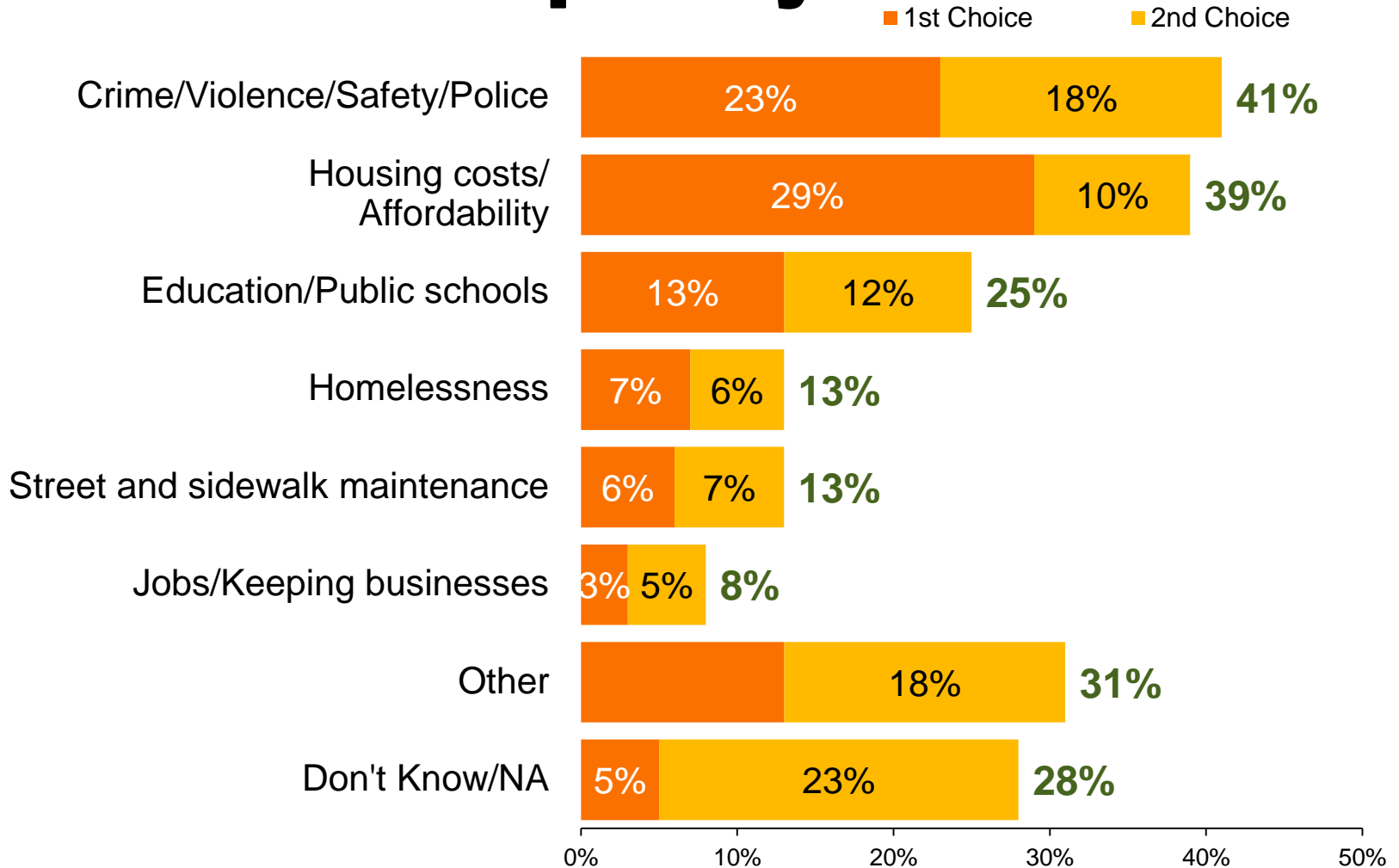
- Discounting those who indicated they were “somewhat” interested, roughly 40%-57% of most all subgroups said they were “extremely” or “very” interested in learning about the City budget.
- The subgroup least interested in learning more about the City budget was non-voters (43% “not too/not at all interested”).
- Those with more intense – positive or negative – views of life in Oakland and City services were also the most likely to be “extremely” or “very” interested.
- Education and income appear to play a role, with interest increasing with higher levels of educational attainment and household income.
- Asian/Pacific Islanders were less interested in the City’s budget.

Voter Sample vs. RDD Sample

- Residents from the voter sample give slightly higher quality-of-life ratings than those in the RDD sample. Other differences are largely of intensity, with voter-sample residents modestly more optimistic and engaged overall.
- **A small subset of the RDD sample is made up of non-voters.** Half as many of those rate quality of life “excellent” as voters across both samples.
- A majority of non-voters give the City “only fair” or “poor” grades for service provision; they are also report not following the budget closely.
- Non-voters are less likely to say housing is their top budget issue – but more likely to say it should be the second priority.



Taking those 1st and 2nd choice concerns together, crime & policing is a top priority.



Verbatim Responses

I would like to have security and education for the people

Improve public schools and get the police department more organized

I want more housing. I want a safe city.

Lower crime rates, and better education

I would like to see help in schools and housing

I pay a lot in taxes to not be safe

Housing and jobs

Less crime and more housing

I care about teachers being paid enough to live here

They need to help with homelessness more, and deal with crime better

Rent is going up and streets need repair

Reduction of crime and repair of city streets

Education and police training

Addressing homelessness and reducing police violence

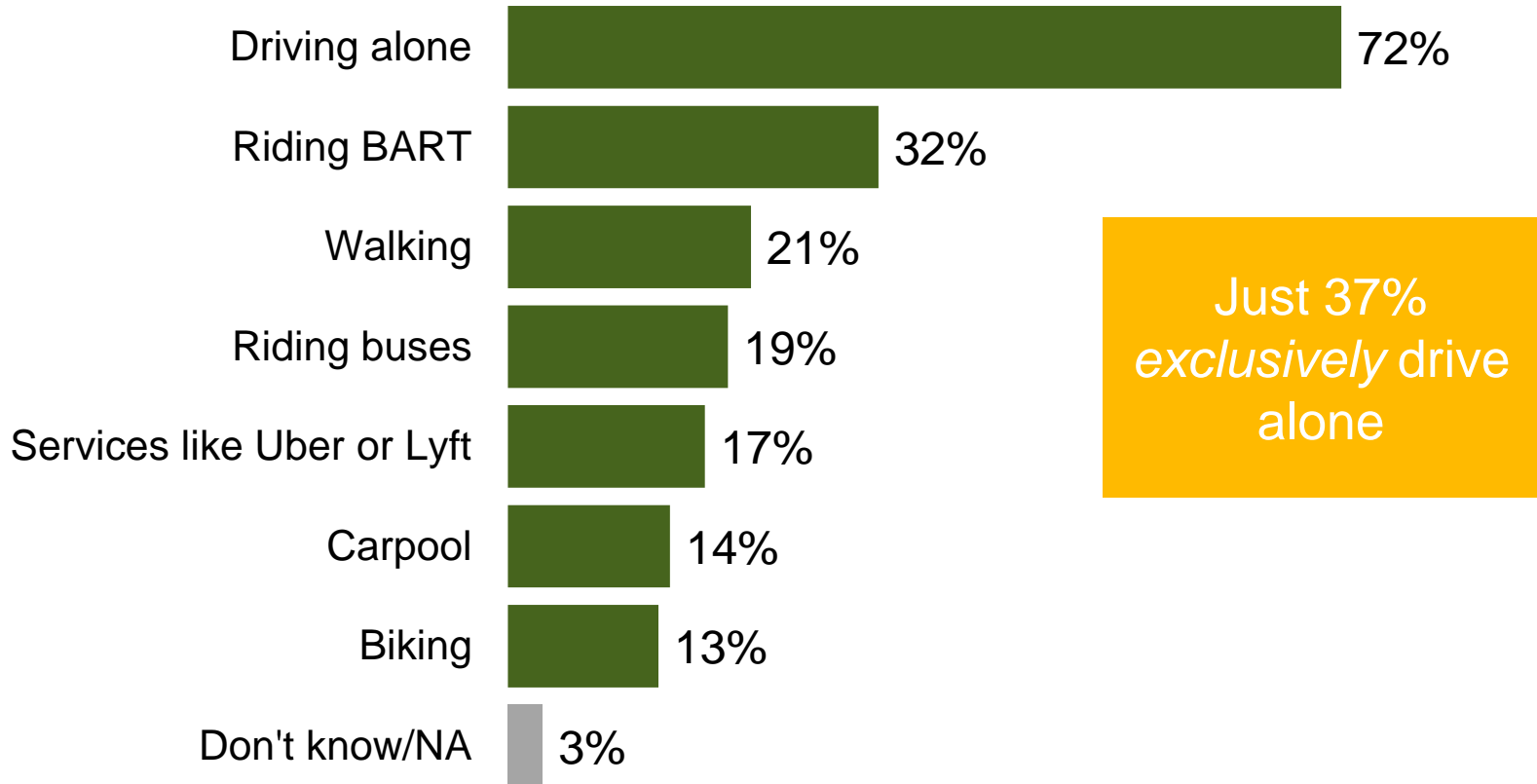
Housing prices and taxes are pushing regular people out

Too much killing and stealing

More police, but also more help for people before they commit the crime

Significant portion of Oaklanders walk or take transit, in addition to driving alone.

Which of the following modes of transportation do you use regularly?





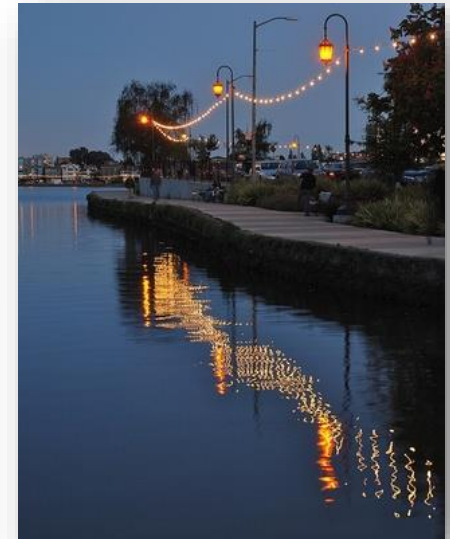
Demographic Breakdowns

- ✓ Overall, Oaklanders still rely on cars to get around. The affluent and highly educated, homeowners, and those who work full-time in Oakland are especially likely to drive alone; unemployed and low-income residents are the groups least likely to do so.
- ✓ Oaklanders who get around without a car are likely to use a variety of methods – reporting that they bike, walk, take buses, *and* use ride-hailing services.
- ✓ Those who have lived in Oakland fewer than five years are especially likely to bike. Wealthier and newer residents are disproportionately likely to use BART or ride-hailing apps to get around. District 1 residents are among the most likely to use BART; ride-hailing apps in District 5.
- ✓ Those earning less than \$60,000 and women without a college degree are more likely to rely on buses than those in other groups.

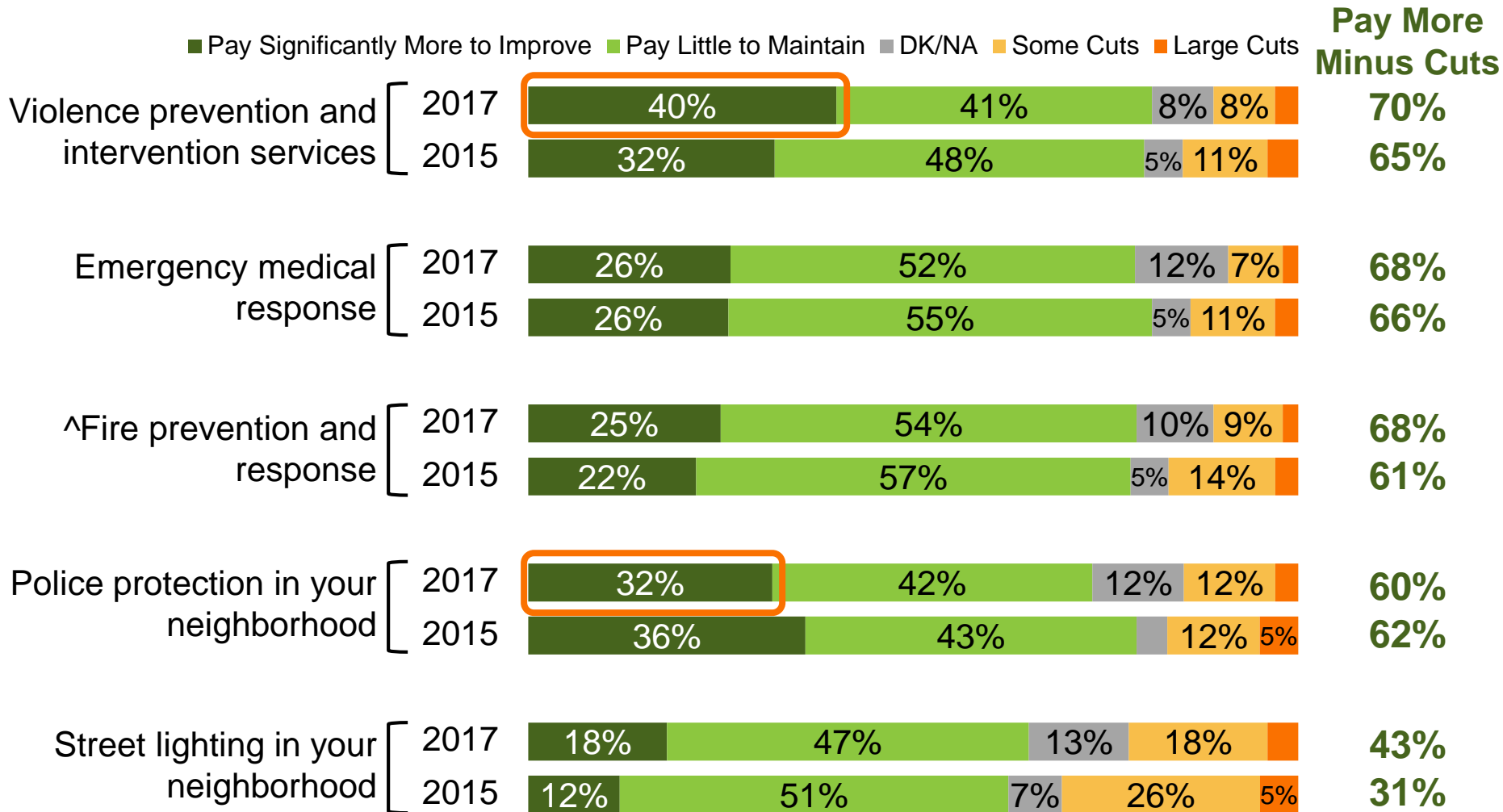
Year-to-Year Comparisons by Issue Area

Looking at Trends

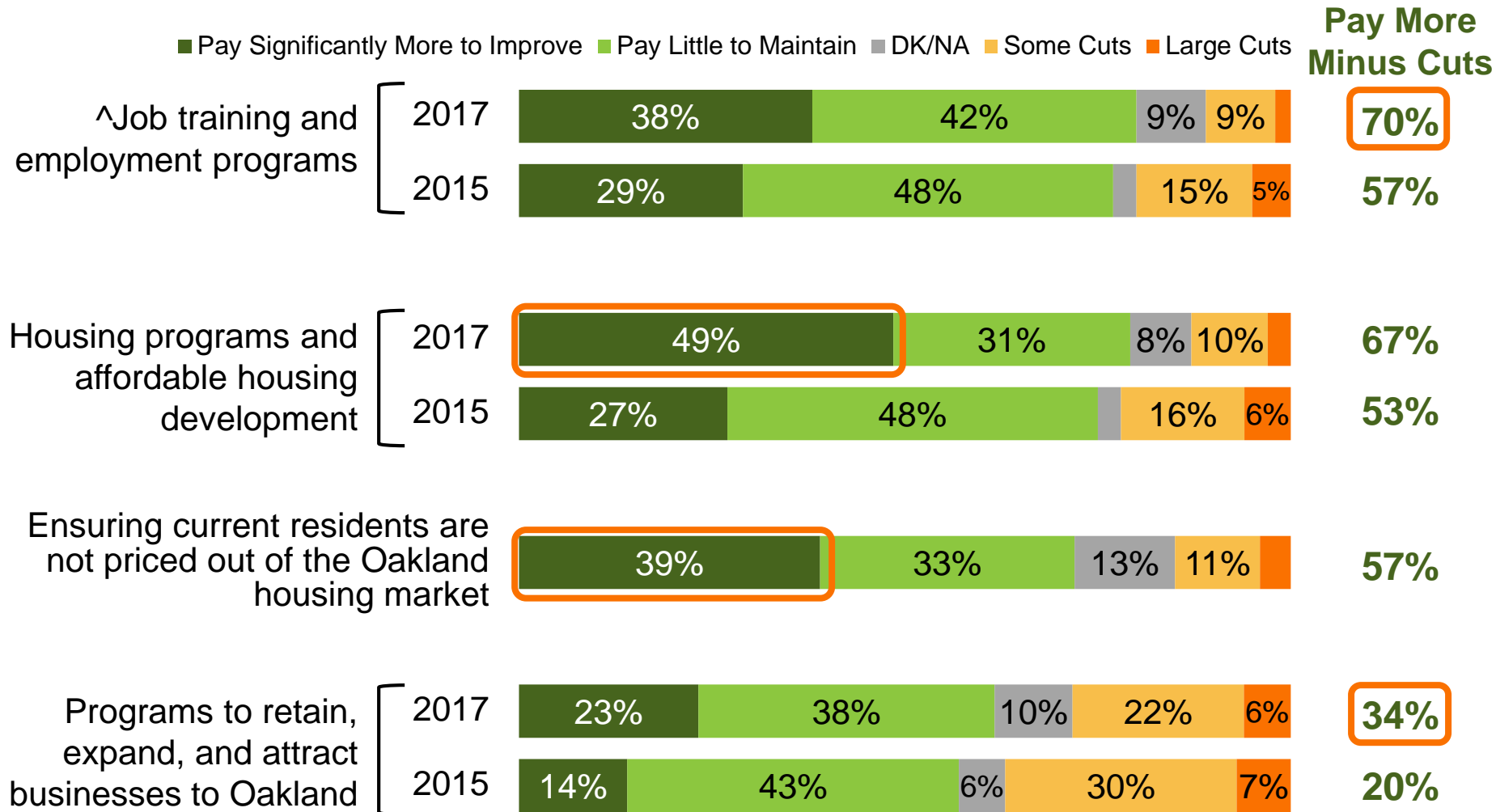
- ✓ The following slides group these same priorities in several general themes, showing changes in attitudes from 2015.
- ✓ Themes include:
 - Public safety
 - Housing and the economy
 - Education, arts and culture
 - City services
 - Infrastructure
 - Social services



Views on investment in public safety have changed relatively little since '15.

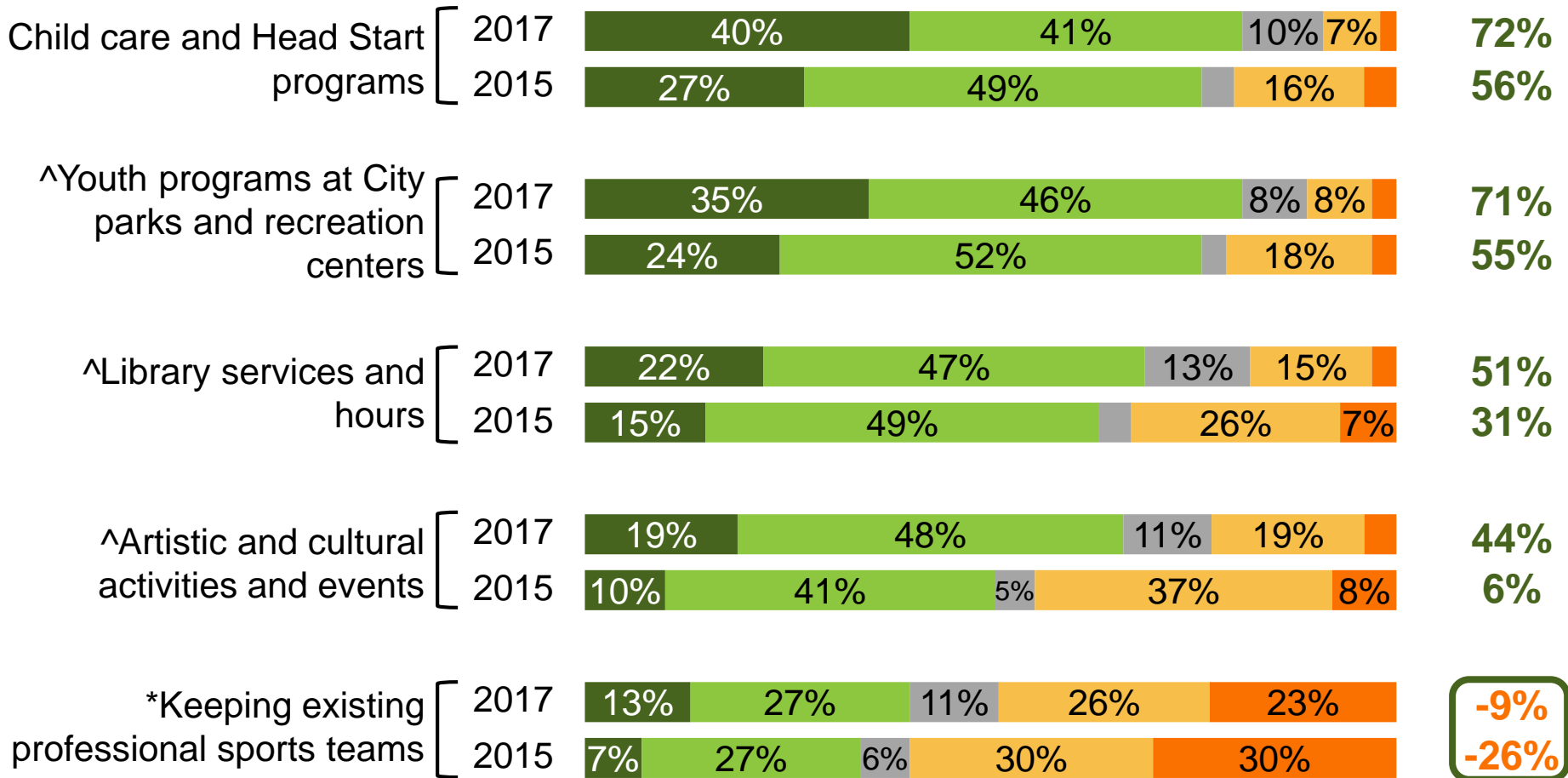


Oaklanders are much more willing to invest in housing and job training.



Oaklanders are much less willing to see cuts to education and cultural services.

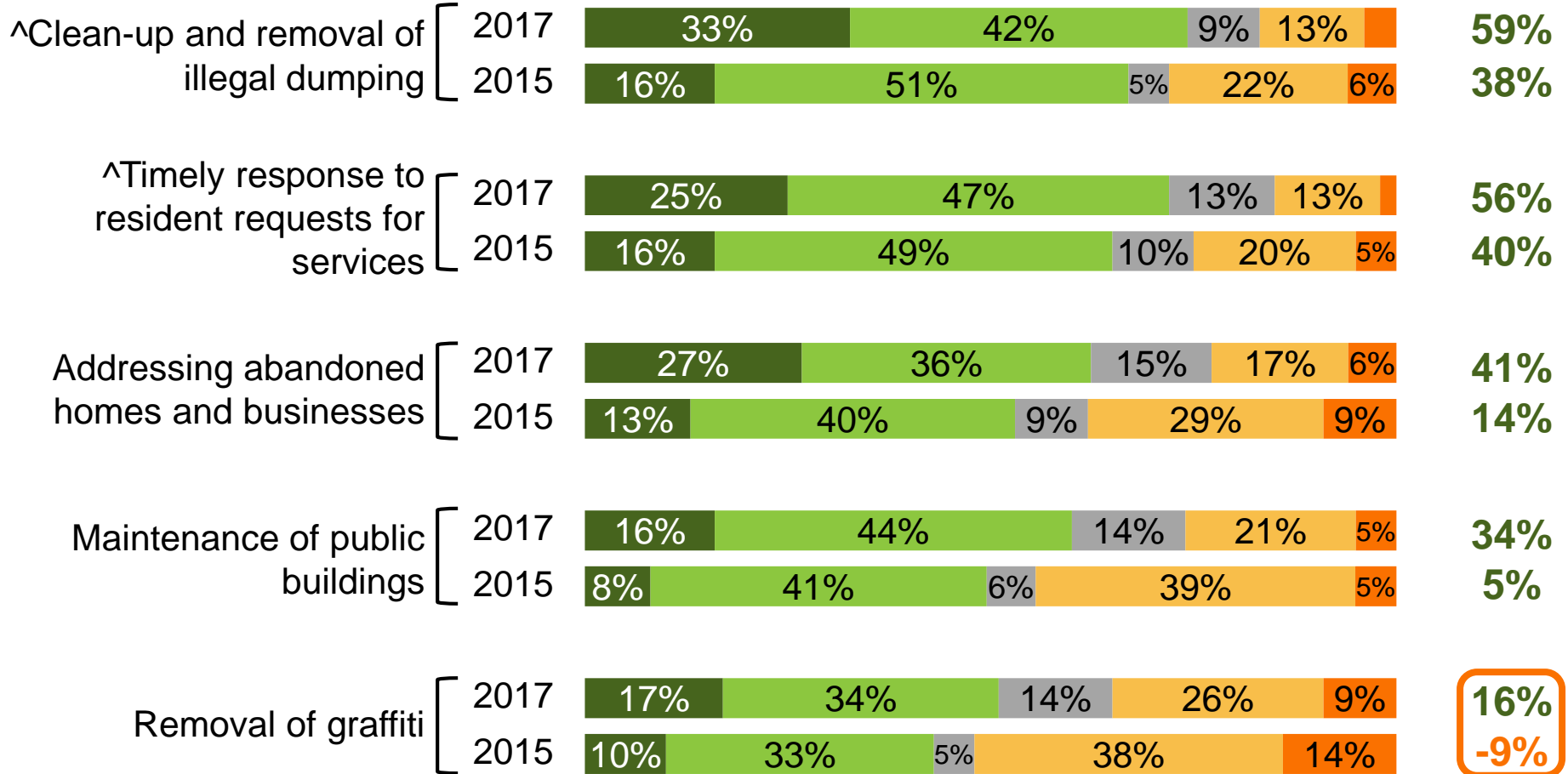
■ Pay Significantly More to Improve
 ■ Pay Little to Maintain
 ■ DK/NA
 ■ Some Cuts
 ■ Large Cuts
 Pay More Minus Cuts



Q7 a/c/e/k/x. I am going to mention some of the services the City provides its residents. Every two years, the City faces hard choices about these services in order to balance its budget. Please tell me whether you think cuts should be made to that service in order to balance the budget, or whether you would be willing to pay additional taxes or fees to maintain or improve that service. ^Not Part of Split Sample/
 *Wording Slightly Different in 2017 Survey

They are much more willing to invest in building maintenance than in 2015.

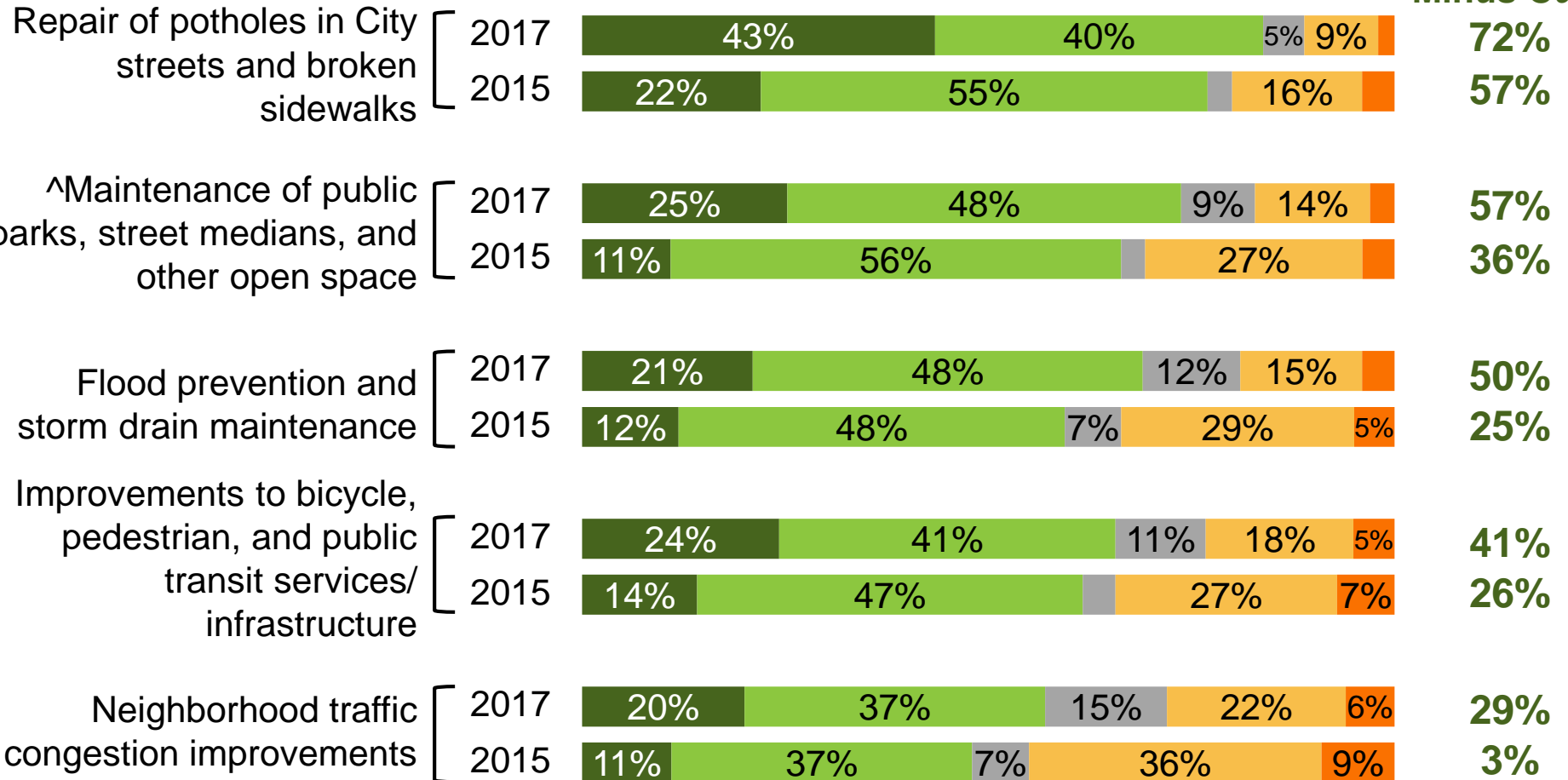
■ Pay Significantly More to Improve ■ Pay Little to Maintain ■ DK/NA ■ Some Cuts ■ Large Cuts **Pay More Minus Cuts**



16%
-9%

More than two in five would now pay more to fix potholes and sidewalks.

■ Pay Significantly More to Improve ■ Pay Little to Maintain ■ DK/NA ■ Some Cuts ■ Large Cuts **Pay More Minus Cuts**



Half as many are willing to see “some cuts” to senior programs as in 2015.

■ Pay Significantly More to Improve
 ■ Pay Little to Maintain
 ■ DK/NA
 ■ Some Cuts
 ■ Large Cuts
 ■ Pay More Minus Cuts

