

Sugar Sweetened Beverage Community  
Advisory Board  
Regular Meeting Notice

Oakland City Hall  
1 Frank H. Ogawa Plaza  
Oakland, CA 94612  
Hearing Room 1, 1st floor  
October 8, 2018 • 6:30pm-8:30pm

AGENDA

1. Welcome and Call to Order (2 minutes)
  - Modifications to the Agenda
2. Open Forum
3. Adoption of Prior Meeting Minutes – \*July 9, 2018\* and \*September 17, 2018\* *Action*
4. Administrative Update *Discussion*
5. Presentation by the Sugar Freedom Project on the Corner Store Survey Results *Discussion*
6. Information on Capital Improvement Projects Presented by Oakland Public Works Agency & Oakland Parks, Recreation and Youth Development *Discussion*
7. Response from Finance Department and Discussion of Business Education for Sugar Sweetened Beverage Tax *Discussion*
8. Retreat Planning *Discussion*
9. Update on Hydration Stations Installation *Discussion*
10. Selection of Agenda Items for the November 2018 Board Meeting *Action*
11. Adjournment

*In compliance with Oakland's policy for people with chemical allergies, please refrain from wearing strongly scented products to meetings. In compliance with the American Disabilities Act, if you need assistance to participate in the meetings for the Sugar Sweetened Beverage Community Advisory Board, please contact Nachele Jackson at 510-238-4919. Notification 48 hours prior to the meeting will enable the City of Oakland to make reasonable arrangements to ensure accessibility. If you have questions regarding this agenda or related materials, please contact our office at the number above.*

**DRAFT MINUTES**  
***Sugar Sweetened Beverage Community Advisory Board***

Oakland City Hall,  
1 Frank H. Ogawa Plaza  
Oakland, CA 94612  
Hearing Room 1, 1<sup>st</sup> floor  
**July 9, 2018 6:30pm-8:30pm**

Board Members present: Esperanza Pallana (Chair), Tonya Love, Kim Carter  
Martinez

*Board Members absent:* Jared Fine, Renia Webb, Gabriela Regalado, Julia  
Liou, Donna Carey

City Staff Members present: Sandra Taylor, Sara Bedford, Nachele Jackson &  
Diveena Cooppan

**1. Welcome and Call to Order**

The meeting was called to order at 6:33 pm without a quorum. The Board introduced themselves.

Item # 6 was moved to item #5. A draft work plan and timeline. The Chair Pallana handed out a 2017-2018 Highlight sheet of work since the Board's inception eight (8) months ago and noted attendance and committees.

**2. Open Forum**

Seven speakers made public comments.

1. **Francis Calpotura** – Sugar Freedom Project
2. **Maria Rios** – Street Level Health Project
3. **Hermelinda Sanchez** - Street Level Health Project
4. **Cheecencia Garcia** - Street Level Health Project
5. **Shaniece Alexander** – Oakland Food Policy Council

**3. Adoption of Meeting Minutes from the Regular Meetings - April 9, 2018 and June 11, 2018**

Sandra Taylor addressed the resubmitted April 9, 2018 minutes which were correct as originally submitted. A quorum was not present to adopt the minutes.

**4. Review of the Approved Mid-Cycle Budget Adjustments Related to the Sugar-Sweetened Beverage Fund**

Sandra Taylor referred to the memo adopted in the Mid-Cycle budget process authored by President Pro Tem Guillen, Vice Mayor Campbell Washington, Councilmember

**DRAFT MINUTES**  
***Sugar Sweetened Beverage Community Advisory Board***  
Oakland City Hall,  
1 Frank H. Ogawa Plaza  
Oakland, CA 94612  
Hearing Room 1, 1<sup>st</sup> floor  
**July 9, 2018 6:30pm-8:30pm**

McElhaney. The Chair noted that the report was amended and the policy directive is not a mandate but an expressed desire.

The members present raised questions concerning the information presented and staff clarified:

- the ongoing budget column in the and Council intent
- FY 2018-2019 spending categorization.
- Council is stating they want to see investment in Oakland Parks and Receptions infrastructure and the monies would show in the 19-20 budget.
- Spending projects would still have to be adopted.
- Measure HH expenditures will be able to be tracked

**Public Comments: 1 speaker made public comments.**

- **Charles Reed** - Roots Inc.

**5. Discussion of By-Laws**

Tonya Love submitted a full draft of the By-Laws and stated her main concerns

- were the Boards scope of work,
- who and how many spokespersons the Board will have &
- who has the power to set the final agenda.

The Chair suggested to make any adjustments and provide that copy to staff and legal counsel.

Members also discussed the probability of having two Vice-Chairs, as an alternate and a trainee, board officer election timing and service period. Staff raised concerns regarding the role and language of the Treasurer and advises the members to change the language.

**Public Comments: 1 speaker made public comments.**

- **Neil Thapar** – Sustainable Economies Law Center

**6. Schedule Change and Agenda Items for the September 2018 Board Meeting**

Tonya Love said she would not serve on the community planning committee.

Staff will keep the Board apprised of resolutions that go through Council to award funds, further communication for one-time expenditures.

**DRAFT MINUTES**  
***Sugar Sweetened Beverage Community Advisory Board***

Oakland City Hall,  
1 Frank H. Ogawa Plaza  
Oakland, CA 94612  
Hearing Room 1, 1<sup>st</sup> floor  
**July 9, 2018 6:30pm-8:30pm**

The board deferred agenda items for September except for confirming a date for the RFP Committee to meet and the planning process for the RFQ. A Doodle Poll to survey members for September 17, 2018, or September 24, 2018, will be generated.

**7. Adjournment**

The meeting was adjourned at 8:22 pm

**DRAFT MINUTES**  
***Sugar Sweetened Beverage Community Advisory Board***

Human Services Department  
150 Frank H. Ogawa Plaza, 4<sup>th</sup> Flr  
Oakland, CA 94612

**September 17, 2018 6:30pm-8:30pm**

Board Members present: Esperanza Pallana, Tonya Love, Kim Carter Martinez,  
Jared Fine, Donna Carey, and Julia Liou

*Board Members absent:* Renia Webb and Gabriela Regalado

City Staff Members present: Sandra Taylor, Nachele Jackson & Sharon Robinson

**1. Welcome and Call to Order**

The meeting was called to order at 6:30 pm. The Board and City Staff introduced themselves.

**2. Open Forum**

Two speakers made public comments.

1. **Francis Calpotura** – Sugar Freedom Project
2. **Neil Thapar** – Oakland Food Policy Council (OFPC)

**3. Adoption of Meeting Minutes from the Regular Meetings - April 9, 2018, & June 11, 2018**

Esperanza Palana moved to adopt the minutes and all members seconded the motion to approve the minutes. The minutes were unanimously approved with the revision of correct spelling of "Gail Myers" name on page 4. The July 17 and September 17 meeting minutes will be included in the October 8, 2018, agenda packet.

**4. Discussion of By-Laws**

Tonya Love provided a new and revised draft of the bylaws to the Board and briefly highlighted the revisions.

Copies of the draft bylaws were made for the public and distributed.

Board member discussion referred to the absence of standing committees, the opportunity for staff to review, and role of City Attorney as legal advisory and feedback needed from City attorney.

**DRAFT MINUTES**  
***Sugar Sweetened Beverage Community Advisory Board***

Human Services Department  
150 Frank H. Ogawa Plaza, 4<sup>th</sup> Flr  
Oakland, CA 94612

**September 17, 2018 6:30pm-8:30pm**

Board review and comments are due by Monday, September 24, 2018, then forwarded to City staff for review. The goal is to have the bylaws finalized at the October 8, 2018 meeting.

**5. Update on Board Seats**

The Chair explained that there are two vacancies on the Advisory Board since Renia Webb stepped down and one seat remains unfilled from last year. She will draft a letter to the Mayor to request the Board vacancies be filled.

**6. Update on RFP Timeline**

After Council's approval in the budget process, the Request for Proposal (RFP) process is being worked on but efforts have been delayed as staff time has been used to move forward SSB Board priorities such as the contract for the Sugar Freedom Project's additional work and the recommendation to restore afterschool meals at Oakland Parks and Recreation and Youth Development and Oakland Library sites. It is expected to be released in the middle of October 2018. The timeline to submit proposals is being determined but it will likely be within 4-6 weeks from the release date.

Discussion ensued and Staff responded to questions about the process:

- RFP will be posted and will be advertised in the newspaper (it will not be an online application)
- The process to ensure there are no conflicts of interest involving the Board
- Next RFP to be issued in 18 months after this one.
- City staff provides technical assistance to answer questions related to requirements for submission and will check outside resources to refer

Julia Liou referred to the RFQ timeline and suggested it should be done soon.

**7. Update on Hydration Station SSB Labels/Branding**

The Chair provided a recap of the prior discussion about the SSB sponsored hydrations stations from July's meeting and the status of the labels/branding were discussed. Staff efforts have focused on securing the contract to get all hydration stations installed this fiscal year. There are possibility 10 hydration stations up and running at OUSD sites. Staff will confirm the number of stations installed and provide an ongoing status report at Advisory meetings.

**DRAFT MINUTES**  
***Sugar Sweetened Beverage Community Advisory Board***

Human Services Department  
150 Frank H. Ogawa Plaza, 4<sup>th</sup> Flr  
Oakland, CA 94612

**September 17, 2018 6:30pm-8:30pm**

Ad-Hoc committee, which includes Julia Liou and Donna Carey, will connect to develop simple branding/messaging for the stations. There was discussion about the possibility of joining regional efforts to provide cohesive communications and messaging about the soda tax. Jared mentioned that the Alameda County Nutrition Services has expressed interest in collaborating with the Advisory Board on this issue.

**8. Schedule Change and Agenda Items for the October 2018 Board Meeting**

The next meeting will take place on October 8, 2018. The following meeting will take place on November 5, 2018. The Board retreat will be scheduled after the November midterm election; aiming for early December.

Sandra Taylor reminded the Board that City staff will support retreat planning and resources are available to provide facilitation and assistance for the retreat. Esperanza asked the members to come to the October meeting with suggestions for the Board retreat to move forward.

The agenda items for the October 8, 2018 meeting tentatively include:

- Retreat planning
- Hydration station installations and messaging/branding
- Sugar Freedom Project presentation of the Corner Store Outlet survey
- Bylaws

**9. Adjournment**

The meeting was adjourned at 7:56 pm

### Capital Improvement Projects: Playgrounds/Tot Lots, City Pools, and Sports Facilities

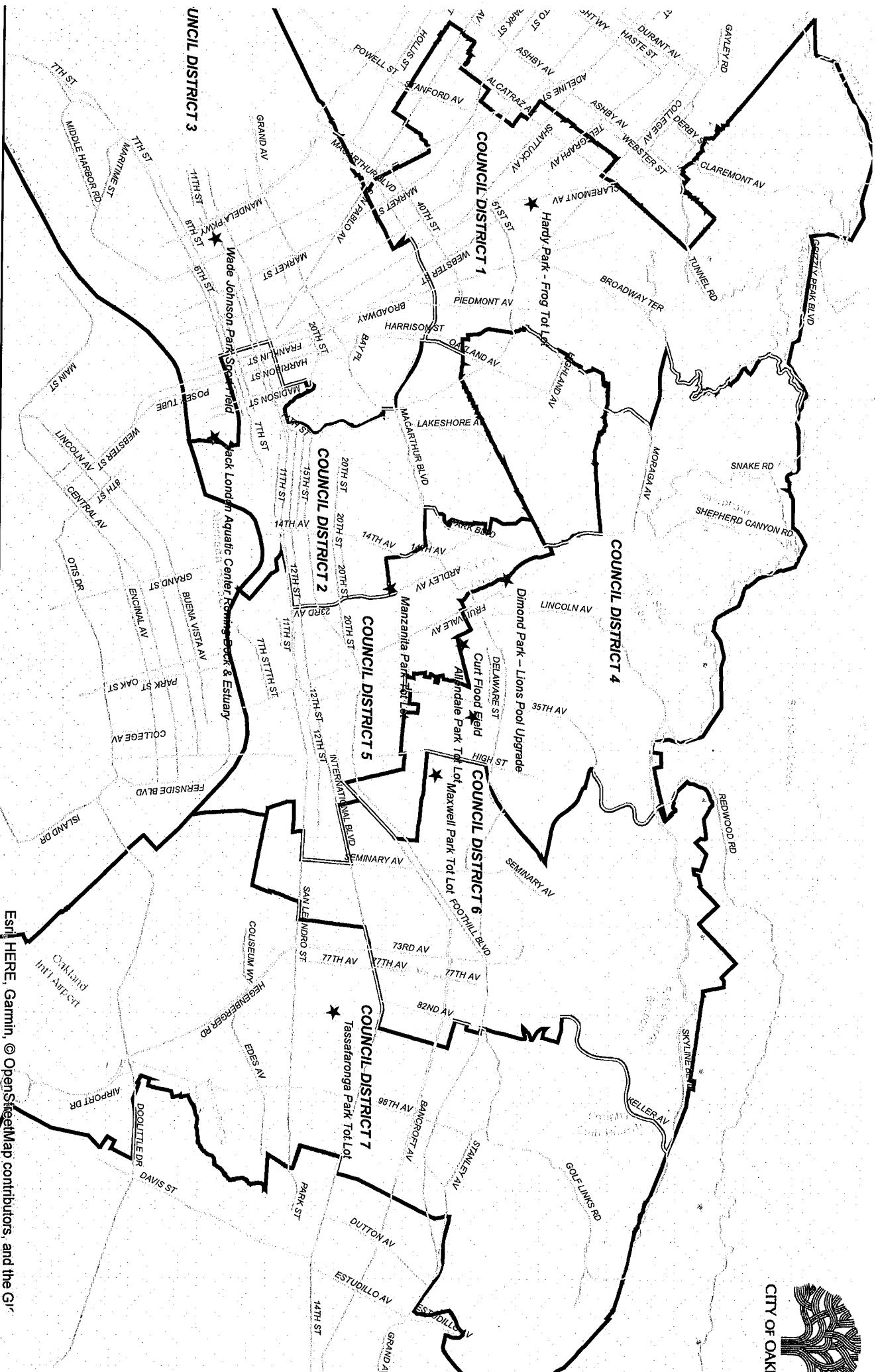
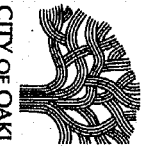
Oct. 8, 2018

Council Dist.	Project	Location	Tot Lot	Pools and Multi-use Sports Fields
1	Hardy Park - FROG Tot Lot	491 Hardy Street	\$ 88,000	
2	Jack London Aquatic Ctr.: Rowing Dock & Estuary Launch Ramp Dock Assessment & Improvements	115 Embarcadero	\$	700,000
3	Wade Johnson Park Sport Field	1250 Kirkham St	\$	465,000
4	Allendale Park Tot Lot	3711 Suter Street	\$ 420,000	
4	Dimond Park - Lions Pool Upgrade	3860 Hanly Rd, Oakland	\$	600,000
4/5	Curt Flood Field	3200 Coolidge Ave.	\$	1,100,000
5	Manzanita Park Tot Lot	2701 22nd Avenue	\$ 305,000	
6	Maxwell Park Tot Lot	4618 Allendale Avenue	\$ 352,000	
7	Tassafaronga Park Tot Lot	85th Ave & E Street	\$ 174,000	
<b>SUBTOTAL FUND NEEDS:</b>			<b>\$ 4,204,000</b>	<b>\$ 2,865,000</b>

Approved Meas. HH Funds \$ 4,403,500  
 Remaining Funds - contingency \$ 199,500

(6)





*Capital Improvement Projects: Playgrounds/Tot Lots, City Pools and Sports Facilities*

10/8/18

(6)

- 1 assure HH Project Sites
- sets
- JUNCL DISTRICT 1
- JUNCL DISTRICT 2
- JUNCL DISTRICT 3
- JUNCL DISTRICT 4

Esri, HERE, Garmin, © OpenStreetMap contributors, and the GIS

CITY OF OAKLAND  
HUMAN SERVICES DEPARTMENT



Memorandum

TO: Sugar-Sweetened Beverage Community Advisory Board  
FROM: City of Oakland Staff  
DATE: October 5, 2018  
SUBJECT: Response from Finance Department and Discussion of Business Education

---

Staff met with Finance Department staff as a follow-up to issues raised at the September 17 SSB Community Advisory Board meeting. The following information is offered:

- Finance is in the process of translating materials distributed about the SSB tax
- Copies of documents currently distributed are attached:
  - Letter to Business Owner/Tax Manager
  - Frequently Asked Questions
  - SSB Tax Taxpayer Education Day PowerPoint presentation
- Contact information to address questions about the tax and to report misinformation: (866) 240-3665 or [OaklandBevTaxSupport@muniservices.com](mailto:OaklandBevTaxSupport@muniservices.com)

(7)

City of Oakland, SSBT  
c/o MuniServices, LLC  
1714 Franklin St. #100-292  
Oakland, CA 94612



CITY OF OAKLAND

[date]

Taxpayer Name  
DBA  
Address  
City, ST Zip

**Customer Service**



Toll Free Phone: (866) 240-3665  
Hours: Monday-Friday 6 am – 5 pm PST  
Toll Free Fax: (855) 219-4338



Email: [OaklandBevTaxSupport@muniservices.com](mailto:OaklandBevTaxSupport@muniservices.com)  
Website: [www.revds.com](http://www.revds.com)



City of Oakland, SSBT  
c/o MuniServices, LLC  
1714 Franklin St. #100-292  
Oakland, CA 94612

Dear Business Owner / Tax Manager:

**Why we are writing you**

The City of Oakland has selected MuniServices, LLC as a partner to assist the City staff in the collection of its Sugar-Sweetened Beverage Tax. The tax applies to **distributors**, those businesses that bring any item taxable by the Sugar-Sweetened Beverage Tax into the City. **Please note that this also includes retailers who obtain and bring items taxable by the Sugar-Sweetened Beverage Ordinance into the City themselves.** The first Sugar-Sweetened Beverage Tax return for Oakland, CA is for the July 2017 tax period and will be due on or before August 15, 2017.

**What this means**

To assist businesses in meeting this tax obligation, MuniServices will be mailing customized tax packets on behalf of the City of Oakland in early June. Included in the packet will be instructions, frequently asked questions and a customized remittance tax form.

**What to do now**

Once you receive the tax packet, please review it carefully and notify our office of any changes needed to your account.

Please notify your Tax Department or Tax Preparer of this notification. We ask that you update your records with the below remittance address for the City of Oakland Sugar-Sweetened Beverage Tax.

**MuniServices Remittance Address:**

City of Oakland, SSBT  
c/o MuniServices  
1714 Franklin St. #100-292  
Oakland, CA 94612

If you feel as though you have received this notice in error or have questions concerning the Sugar-Sweetened Beverage Tax, contact Taxpayer Support toll free at (866) 240-3665 or [OaklandBevTaxSupport@muniservices.com](mailto:OaklandBevTaxSupport@muniservices.com).

Sincerely,  
MuniServices, LLC  
Taxpayer Support  
On behalf of the City of Oakland, CA

(7)

# Sugar-Sweetened Beverage Tax



CITY OF  
OAKLAND

Taxpayer Education Day

In Conjunction With



Discover. Recover. Prosper.

(9)

# Introduction



In Conjunction With



Discover. Recover. Prosper.

# Getting Started

- Who is responsible for paying the tax?

Distributor = Business that brings taxable items into Oakland.

**\*This includes retailers bringing sugar-sweetened beverages to their own store from outside Oakland.**



# Taxable Items

- Sugar-Sweetened Beverages:

- **\$0.01 per fluid ounce**

- At least 2 calories per ounce

- Contains added caloric sweetener

- Added Caloric Sweeteners:

- **Maximum ounces of beverage that sweetener can produce, multiplied by \$0.01**

- Suitable for human consumption

- Adds calories to beverage

- Perceived as sweet


- Used for making sugar-sweetened beverages by combining with one or more ingredients



# Registration

Remit Registration Form to MuniServices, whether you are liable for the tax or not.



**CITY OF OAKLAND** 

**Registration Form**  
**Sugar-Sweetened Beverage Tax**  
**City of Oakland, CA**

**Customer Services**  
Toll-Free Phone: (855) 240-3895  
Toll-Free Fax: (855) 219-4338  
See table expand.  
Email: [OaklandBeverageSugar@muniservices.com](mailto:OaklandBeverageSugar@muniservices.com)  
Website: [www.aacdc.com](http://www.aacdc.com)

**Step 1 of 3: Check all that apply:**

- My business delivers items taxable by the Sugar-Sweetened Beverage Tax to retailers in the City of Oakland.
- My business brings items taxable by the Sugar-Sweetened Beverage Tax into the City of Oakland for retail sale at our own store.
- My business is not responsible for paying the Sugar-Sweetened Beverage Tax to the City of Oakland because (Check one):
  - My business is not subject to taxation by the City of Oakland, under state or federal law. (Please provide supporting documentation.)
  - My business had annual gross receipts under \$100,000 during the most recent calendar year. (Please provide supporting documentation.)
  - My business has all of its items taxable by the Sugar-Sweetened Beverage Tax delivered by other distributors\*. (Please provide distributor information on the back of this form.)
  - My business does not distribute any items taxable under the Sugar-Sweetened Beverage Tax, and no distributors deliver these items to my business. (See taxable items and exemptions in FAQs.)
  - My business has closed or does not do business in the City of Oakland.

Effective Date: \_\_\_\_\_





# Remitting the Tax

- Tax is due on a **monthly** basis
- Remittance forms mailed to you quarterly
- Forms also available online:
  - [www.revds.com](http://www.revds.com)
  - [www.oaklandnet.com/government/fwawebsite/revenue/revenue\\_biztax.htm](http://www.oaklandnet.com/government/fwawebsite/revenue/revenue_biztax.htm)
- Must be postmarked on or before the 15<sup>th</sup>
  - First tax period: July 2017, due August 15<sup>th</sup> 2017





# Remittance Form

**1. Taxable Sugar-Sweetened Beverage (SSB) Distributed:**

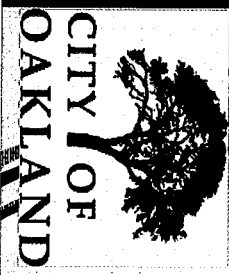
- a. Total number of ready-to-consume ounces: \_\_\_\_\_
- b. Maximum ounces of beverage produced according to manufacturers' instructions (syrups, concentrates, powders, mixes, etc): \_\_\_\_\_
- c. Equals total number of taxable ounces (Line 1a + Line 1b): \_\_\_\_\_

*(Internal Code 9930-28-78)*

*(Internal Code 9930-28-79)*

*(Internal Code 9930-28-11)*

- 2. Tax Due: Line 1c multiplied by \$ 0.01 \$ \_\_\_\_\_
- 3. Penalty: 25% of tax due (Line 2) for late payment\* \$ \_\_\_\_\_
- 4. Subtotal: Line 2 + Line 3 \$ \_\_\_\_\_
- 5. Interest: 1% per month on tax due plus penalty (Line 4) if late\* until paid \$ \_\_\_\_\_
- 6. Equals Total Amount Due: (Line 4 + Line 5) \$ \_\_\_\_\_



**City of Oakland, SSBT**  
 1514 Franklin St. #100-22  
 Oakland, CA 94612  
 (510) 874-2000

**City of Oakland, SSBT**  
 1514 Franklin St. #100-22  
 Oakland, CA 94612  
 (510) 874-2000

**City of Oakland, SSBT**  
 1514 Franklin St. #100-22  
 Oakland, CA 94612  
 (510) 874-2000



# Taxpayer Support

- Toll-Free Phone (866) 240-3665  
*Se habla español.*

- [OaklandBevTaxSupport@muniservices.com](mailto:OaklandBevTaxSupport@muniservices.com)

- [www.revds.com](http://www.revds.com)





# Questions?



**MUNISERVICES**

Discover. Recover. Prosper.

CITY OF OAKLAND  
HUMAN SERVICES DEPARTMENT



Memorandum

TO: Sugar-Sweetened Beverage Community Advisory Board  
FROM: City of Oakland Staff  
DATE: October 5, 2018  
SUBJECT: Response from OUSD – Hydration Station Installations

---

The following hydration stations have been installed at OUSD:

- Skyline
- Roosevelt
- McClymonds
- Westlake
- Sankofa

(9)