

CITY OF LODI

COUNCIL COMMUNICATION

AGENDA TITLE: Adopt Resolution of Intention Accepting the Business Improvement Area Annual Report Expressing the Council's Intention to Levee an Assessment and Setting Date for Public Hearing

MEETING DATE: November 18, 1998

PREPARED BY: City Attorney

RECOMMENDATION: That the City Council adopt the Resolution of Intention accepting the Business Improvement Area Annual Report expressing the Council's intention to levee an assessment and establishing the requisite public hearing on December 16, 1998.

BACKGROUND: Before you this evening is the annual report which is required by the Streets and Highways Code relative to the Business Improvement Area Assessment. Mr. Alan Goldberg will appear on behalf of the Board of Directors to present to the Council the report. It is anticipated that Mr. Goldberg will orally give the Council a summary of the report.

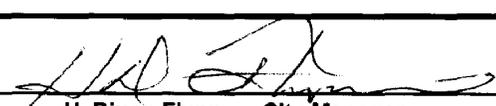
FUNDING: Not applicable.

Respectfully submitted,



Randall A. Hays, City Attorney

APPROVED: _____



H. Dixon Flynn -- City Manager

**Downtown Lodi Business
Partnership**

1999 Annual Report



Mission Statement

Downtown Lodi Business Partnership

The Downtown Lodi Business Partnership was established to promote the economic revitalization of Downtown Lodi and to maintain its economic health on an ongoing basis. This will be accomplished by (1) encouraging development of new businesses while retaining and revitalizing existing businesses, (2) promoting retail activity by creating and maintaining a quality environment through coordinated advertising and Downtown events, and (3) serving as an advocate for Downtown businesses in dealing with local government, maintenance projects, the media, and the general public.

Downtown Lodi Business Partnership 1999 Annual Report

Items listed below refer to Section 36533(b) of the California Streets and Highway Code

- (1) No changes in boundaries of benefit zones within the area are proposed.
- (2) No physical improvements are planned. A Schedule of activities is attached.(Exhibit A)
- (3) A Budget is attached (Exhibit B) which estimates revenues and costs associated with these activities.
- (4) A Benefit Fee schedule and a map of the Business Improvement Area are attached as Exhibits C and D, respectively. There are no changes in the Benefit Fee schedule.
- (5) A surplus of \$20,000.00 is estimated for carryover to 1999.
- (6) Contributions from sources other than assessments are detailed in the Budget presented as Exhibit B.

Exhibit A
Downtown Lodi Business Partnership
Schedule of Activities - 1999

- | | |
|---------------------|--------------------|
| • 3 on 3 Basketball | May 18 |
| • Farmers' Market | June 17 - Sept. 16 |
| • Beerfest | August 5 |
| • Kiddie Parade | September 18 |
| • Arch Lighting | November 18 |
| • Wine Stroll | November 28 |
| • Parade of Lights | December 2 |
| • Awards Ceremony | December 9 |
| • Santa's Village | December 9 - 23 |

Note:

- (1) Date not set for Major Fundraiser
- (2) Intend to develop activities for selected holidays such as Valentine's Day, Easter, Mother's Day and Father's Day.

Exhibit B

Downtown Lodi Business Partnership 1999 Budget

Beginning Cash \$ 20,000

Income:

Assessment Collections	\$ 31,500
City Match	31,500
Fund Raising Events	
Farmers Market	2,800
Beerfest	15,000
Major Event	<u>5,000</u>

Total Income \$ 85,800

Total Cash \$ 105,800

Expenses:

General

Executive Director Salary	\$ 30,000
Office Rent	6,000
Utilities	600
Telephone	1,200
Insurance	2,500
Accounting	600
CDA Conferences	1,800
Stationery, Supplies, & Postage	1,000
Holiday Decorations	3,000
Miscellaneous	<u>1,000</u>

Total Overhead \$ 47,700

Marketing

Newsletter	\$ 1,200
Kiosk Updates	500
Map & Directory Brochures	2,000
Membership Mixers	1,200
Miscellaneous	<u>2,000</u>

Total Marketing \$ 6,900

<u>Advertising</u>	
Newspaper	\$ 21,000
Radio	5,000
Cable	<u>14,000</u>

Total Advertising \$ 40,000

Total Expenses \$ 94,600

Ending Cash \$ 11,200

Downtown Lodi Business Partnership Assumptions - 1999 Budget

- | | | | |
|----|---|---|--------------|
| 1) | Assessment Collections | | |
| | \$35,000 billed X 90% | = | \$ 31,500 |
| 2) | Fund Raising Events | | |
| | • Farmers' Market (14 weeks X 200/week) | = | \$ 2,800 |
| | • Beerfest (expand & control costs) | = | 15,000 |
| | • Major Event (To be developed) | = | <u>5,000</u> |
| | | | \$ 22,800 |
| 3) | Other Events | | |
| | • Anticipate breaking even on other events by obtaining sponsors, selling space, etc. | | |
| 4) | Expenses - General | | |
| | • Executive Director Salary most likely overstated since will not be in place on 1/1/99. | | |
| | • Office Rent - \$500/month | | |
| | • Insurance includes General Liability (\$1,200) plus D & O (\$1,300) | | |
| | • CDA Conferences - 2 conferences X 3 attendees | | |
| | • Holiday Decorations - Contract on bows | | |
| 5) | Expenses - Marketing | | |
| | • Newsletter - 12 issues, printing, & postage | | |
| | • Membership Mixers - 4 mixers, 60 attendees, at \$5.00/attendee = \$1,200 | | |
| 6) | Advertising | | |
| | • Beerfest and Major Fundraiser advertising to be included within event budgets | | |
| | • Specific media budgets to cover other events, promotions, and generic Downtown advertising | | |
| | • Newspaper - Lodi (News-Sentinel), Stockton and San Joaquin County (The Record), Galt (The Herald), and Lockeford - Clements (The News). | | |
| | • Radio - to reach younger audience | | |
| | • Cable (MediaOne) - year round spots | | |

EXHIBIT C

DOWNTOWN LODI BUSINESS PARTNERSHIP

BENEFIT FEE SCHEDULE

	ZONE A	ZONE B
Retailers and Restaurants	\$200. (1-3 emp.) \$300. (4-6 emp.) \$400. (7 + emp.)	\$100. \$150. \$200.
Service Businesses	\$150.	\$ 75.
Professional Businesses	\$ 100.	\$ 50.
Financial Institutions	\$500.	\$500.

note: retail and restaurant businesses will be charged on size which will be determined by number of employees, either full-time or the equivalent made up of multiples of part-time employees.

Business type definitions:

Retail and Restaurant: Businesses that buy and resell goods, examples are clothing stores, shoe stores, office supplies as well as businesses that sell prepared foods and drinks.

Service Businesses: Businesses that sell services. Examples are beauty and barber shops, repair shops, lodging, most automotive-oriented businesses, entertainment businesses such as theaters, etc.

Professional Businesses: Includes Architects, Engineers, Attorneys, Dentists, Doctors, Accountants, Optometrists, Realtors, Insurance Offices, Mortgage Brokers and most other businesses that require advanced and/or specialized licenses and/or advanced academic degrees.

Financial Institutions: Includes banking and savings and loan institutions as well as credit unions, etc.

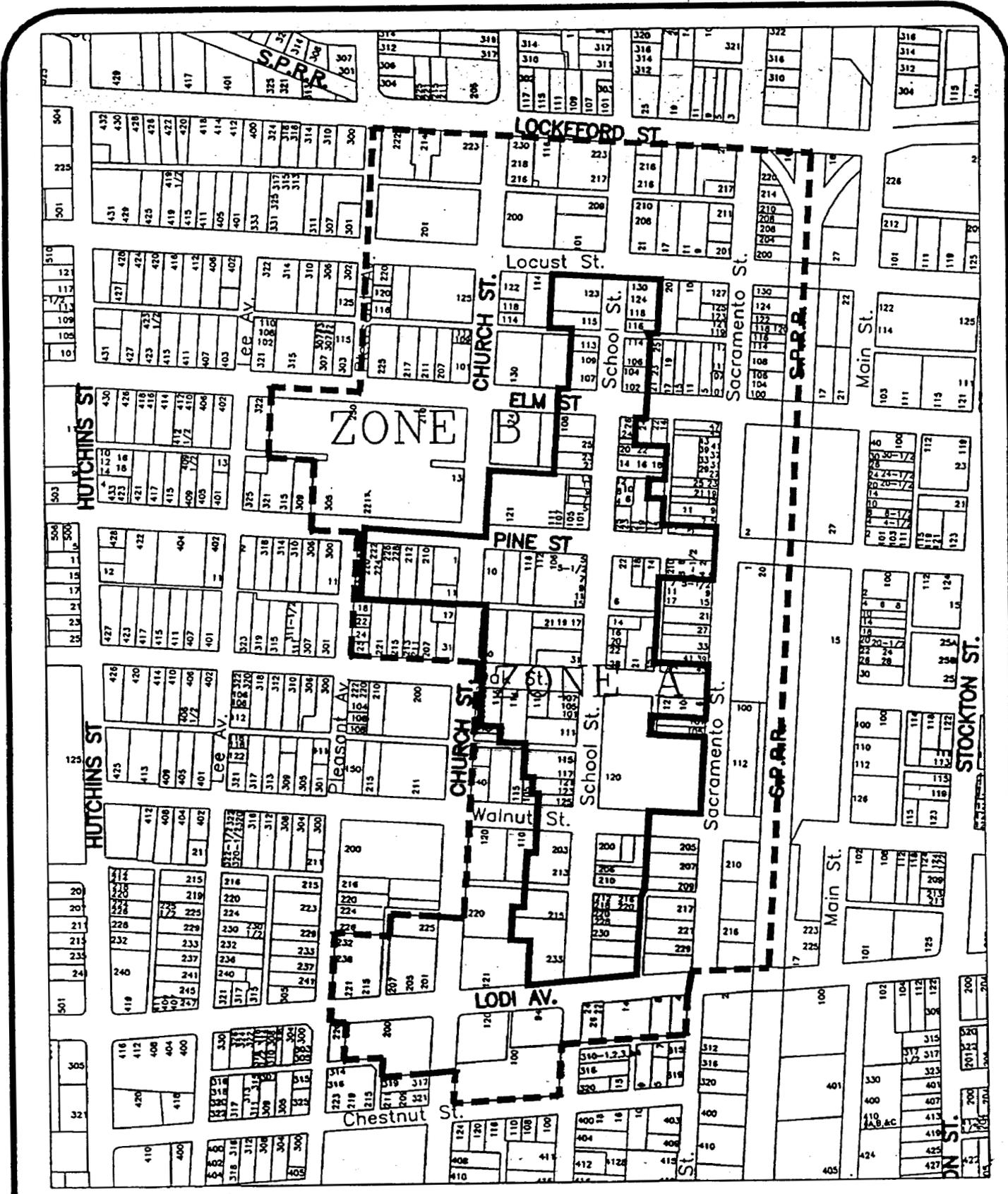


EXHIBIT D

DOWNTOWN LODI BUSINESS PARTNERSHIP

BUSINESS IMPROVEMENT AREA MAP

RESOLUTION NO. 98-170

A RESOLUTION OF INTENTION TO LEVY ANNUAL
ASSESSMENT FOR DOWNTOWN LODI BUSINESS
IMPROVEMENT AREA NO. 1, ESTABLISHING PUBLIC HEARING
DATE AND APPROVING ANNUAL REPORT

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WHEREAS, Downtown Lodi Business Improvement Area No. 1 was established December 17, 1997 by Council adoption of Ordinance No. 1654; and

WHEREAS, the Annual Report as required by Streets & Highways Code, §36533 has been submitted to the Council by the Board of Directors of said improvement area.

NOW, THEREFORE, the City Council of the City of Lodi does hereby resolve, determine, and find as follows:

1. Approves the Annual Report as submitted, said Report being on file with the City Clerk.
2. Establishes December 16, 1998 in the City Council Chambers, at Carnegie Forum, 305 West Pine Street, Lodi, California at 7:00 p.m. or soon thereafter as possible as the date, place and time to hold the public hearing required by Streets and Highway Code, §36534.
3. It is the intention of the City Council to levy and collect assessments within the parking and business improvement area for calendar year 1999 (the Area's fiscal year).
4. The boundaries of the entire area to be included in the Area, and the boundaries of each separate benefit zone within the area, are set forth in the Map, Exhibit A, incorporated herein by reference. A true and correct copy of the map is on file with the City Clerk of the City of Lodi.
5. The types of improvements and activities proposed to be funded by the levy of assessments on business in the Area are in Exhibit B hereto and incorporated by reference.
6. At the time of the public hearing, written and oral protests may be made. The form and manner of protests shall comply with Streets & Highways Code §§36524 and 36525.

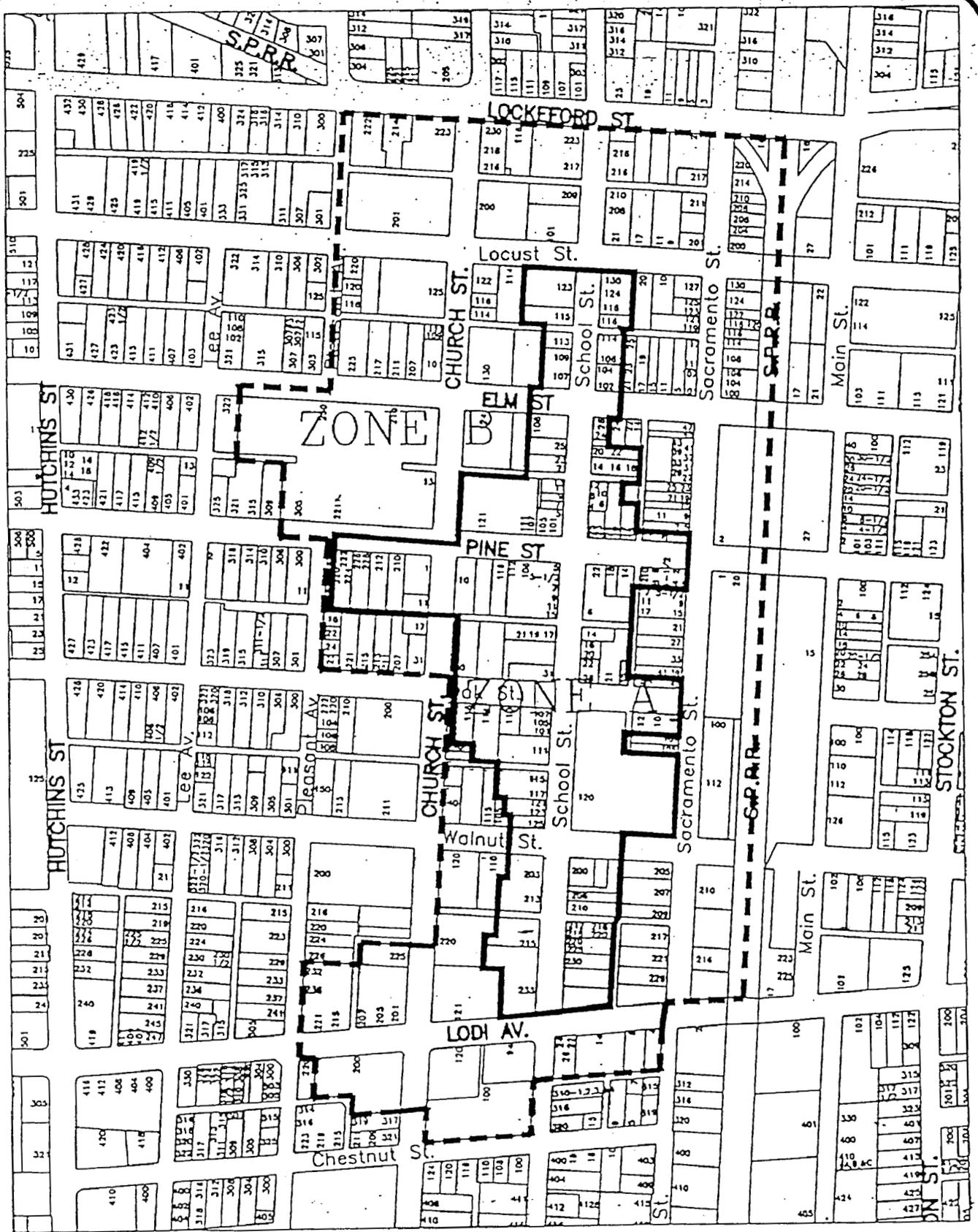
Dated: November 18, 1998

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I hereby certify that the foregoing is a true and correct copy of Resolution No. 98-170, which was duly and regularly passed and adopted by the City Council of the City of Lodi in a regular meeting held November 18, 1998 by the following vote:

AYES: Council Members – Johnson, Land, Mann, Pennino and Sieglock (Mayor)
NOES: Council Members – None
ABSENT: Council Members – None
ABSTAIN: Council Members – None


ALICE M. REIMCHE
City Clerk



DOWNTOWN LODI BUSINESS PARTNERSHIP
 BUSINESS IMPROVEMENT AREA MAP

EXHIBIT A

EXHIBIT B

NARRATIVE DESCRIPTION OF BIA PROGRAMS

Funds from the BIA will be used to establish but are not limited to the following programs:

A. Image Building:

- “Shop Lodi First” campaign intended to discourage community shoppers from going to nearby malls and community areas.
- Periodic institutional campaigns centered around prime shopping times – Easter, Christmas, etc.

B. Retail Events and Activities:

- Art Fairs
- Street Fairs
- Sidewalk Sales
- Back to School Sales
- Holiday Festivities
- Patriotic Themes

C. Coordinated Marketing Activities:

- Advertising supplements for local newspapers
- Direct mail promotions

D. Streetscape Involvement's

- Trash receptacles
- Flowers and plants at selected locations
- Physical cleanup of streets and sidewalks
- High visibility facade improvements

E. Commercial Recruitment and Retention

- Work with the City's Economic Development coordinator and the Chamber of Commerce to actively seek the most suitable business to fill existing vacancies or vacancies as they occur.
- Provide support services to existing businesses needing assistance in order to remain in the downtown area.