

# CITY OF OAKLAND



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Department of Transportation  
Safe Streets Division

## **Bicyclist and Pedestrian Advisory Commission, Monthly Meeting Agenda** **Thursday, February 17, 2022; 6:00-8:00 pm** **Teleconference**

BPAC Home Page: [www.oaklandca.gov/boards-and-commissions/bicyclist-and-pedestrian-advisory-commission](http://www.oaklandca.gov/boards-and-commissions/bicyclist-and-pedestrian-advisory-commission)  
Resources for Commissioners: <https://www.oaklandca.gov/resources/resources-for-bpac-members>

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### **Commissioners**

Andrew Campbell, Alexander Frank, Grey Gardner, Michael Lok, Phoenix Mangrum,  
David Ralston, Patricia Schader (Chair), Nicholas Whipps, Dianne Yee (Vice-Chair)

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Pursuant to [California Government Code section 54953\(e\)](#), Oakland Bicyclist and Pedestrian Advisory Commissioners, as well as City staff, will participate via phone/video conference, and no physical teleconference locations are required.

### **PUBLIC PARTICIPATION**

To join the meeting:

- To join the meeting by video conference, please click on this link to download Zoom and open the meeting on a computer or smart phone: <https://zoom.us/j/98311507451> at the noticed meeting time.
- To join the meeting by phone, please dial at the noticed meeting time (for higher quality, dial a number based on your current location): US: +1 (408) 638-0968 or +1 (669) 900-6833 or +1 (253) 215-8782 or +1 (346) 248-7799 or +1 (301) 715-8592 or +1 (312) 626-6799 or +1 (646) 876-9923 International numbers available: <https://zoom.us/j/98311507451> **Webinar ID: 983 1150 7451**

To comment in the meeting:

- To comment by Zoom video conference, click the “Raise Your Hand” button to request to speak when Public Comment is being taken on an eligible agenda item. You will be permitted to speak during your turn, allowed to comment, and after the allotted time, re-muted. Instructions on how to “Raise Your Hand” are available at: <https://support.zoom.us/hc/en-us/articles/205566129>.
- To comment by phone, please call on one of the above listed phone numbers. You will be prompted to “Raise Your Hand” by pressing \*9 to speak when Public Comment is taken. You will be permitted to speak during your turn, allowed to comment, and after the allotted time, re-muted. Please unmute yourself by pressing \*6.

If you have any questions, please email Noel Pond-Danchik, staff liaison to the commission at [npond-danchik@oaklandca.gov](mailto:npond-danchik@oaklandca.gov).

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<b>Time</b>	<b>#</b>	<b>Topic</b>
6:00	1	<b>Teleconference Protocol/Roll Call/Determination of Quorum/Introductions</b> (10 minutes)
6:10	2	<b>Open Forum / Public Comment</b> (10 minutes) – Members of the public may comment on any issue within BPAC’s subject matter jurisdiction. Comments on a scheduled agenda item will be heard with that item. The BPAC’s Open Forum Committee tracks Open Forum issues raised by the public. (See <a href="http://tinyurl.com/Oakland-BPAC-OpenForumTracking">tinyurl.com/Oakland-BPAC-OpenForumTracking</a> .) The Committee reviews the public comments on a periodic basis to identify policy issues for discussion by the Commission. To request City services, please contact the City of Oakland Call Center; information at <a href="http://www.oaklandca.gov/services/oak311">www.oaklandca.gov/services/oak311</a> .
6:20	3	<b>Approval of meeting minutes Attachment</b> (5 minutes) – Seek motion to adopt the January 2021

BPAC Meeting minutes.

- 6:25 4 **Renewal of Resolution to Continue Teleconference Meetings Attachment** (5 minutes) – The Commission will consider renewing a resolution determining that conducting in-person meetings of the Bicyclist & Pedestrian Advisory Commission and its committees would present imminent risks to attendees’ health, and electing to continue conducting meetings using teleconferencing in accordance with California Government Code Section 54953(e), a provision of Assembly Bill 361 (AB-361).
- 6:30 5 **Recent Bicyclist and Pedestrian Fatal Traffic Crashes** (5 minutes) – Vice Chair Schader ([patricias.oakland@gmail.com](mailto:patricias.oakland@gmail.com)) will lead the commission in a discussion of recent fatal and other high-profile traffic crashes in Oakland involving bicyclists and pedestrians.
- Around 8pm on Friday, January 21, 2022, a 31-year-old, male pedestrian was struck and killed by a driver while crossing Bancroft Ave midblock on the 6100 block of Bancroft Ave.
- 6:35 6 **14<sup>th</sup> Street Safety Project Attachment** (20 minutes) – OakDOT Transportation Planner Charlie Ream ([cream@oaklandca.gov](mailto:cream@oaklandca.gov)) will present on the 14<sup>th</sup> Street Safety Project. The project is proceeding toward 100% design in early 2022, with construction potentially beginning in early 2023. This roadway safety project will install protected bike lanes on 14th Street from Brush Street to Oak Street, take 14th Street from 4 to 2 vehicle lanes, shorten pedestrian crossings, and install new landscaping and sidewalk lighting. OakDOT is scheduled to bring the project to the Public Works Committee on 3/22/22 (date tentative). Come learn more about the project and about ways to stay involved as we move toward construction!
- 6:55 7 **Committee Overviews, Report Backs, and New Assignments Attachment** (15 minutes) – Committees of the BPAC will provide brief overviews and updates to the Commission. All commissioners will be given the opportunity to volunteer for, switch, or remove themselves from the Commission’s committees and liaison positions. A list of active committees is included in the agenda packet and at <https://www.oaklandca.gov/resources/bicyclist-and-pedestrian-advisory-commission-bpac-committees-and-liaisons>.
- 7:10 8 **Transportation Development Act (TDA) Article 3 Grant Application** (10 minutes) – Julieth Ortiz ([jortiz@oaklandca.gov](mailto:jortiz@oaklandca.gov)), DOT Transportation Planner, will present an overview of existing Transportation Development Act (TDA) Article 3 projects and a draft project list for fiscal year 2022-23. This year’s recommendation is to use funding for existing programs/projects, including the bicycle parking program, bike signage and the stairs and path program. We are seeking BPAC approval for this TDA cycle. Allocations for this fiscal year have not been received yet.
- 7:20 9 **Active Transportation Program (ATP) Cycle 6 Grant Application** (20 minutes) – Julieth Ortiz ([jortiz@oaklandca.gov](mailto:jortiz@oaklandca.gov)), DOT Transportation Planner, will present on the proposed transportation projects for the Active Transportation Program (ATP) Cycle 6 and provide an update on the status of projects from previous ATP awards. ATP is a biannual competitive funding opportunity for projects that encourage increased bicycling and walking. The ATP is a state-administered program that distributes both state and federal funds. Applications for this year are due in June. The projects currently under consideration are:
1. Bancroft Ave Greenway, Design (previously submitted, ATP Cycle 5)
  2. 73rd Ave - Active Connections to Transit, Construction
  3. Coliseum Bay Trail Connector (66th Ave), Design & Construction (previously submitted, ATP Cycle 4)
  4. LAMMPS Phase 2, Design & Construction
  5. 27th Street Complete Streets, Construction
  6. Market Street Pedestrian Improvements
- 7:40 10 **Three-month agenda look-ahead, suggestions for meeting topics, announcements Attachment** (10 minutes)



To request disability-related accommodations or to request an ASL, Cantonese, Mandarin or Spanish interpreter, please email [npond-danchik@oaklandca.gov](mailto:npond-danchik@oaklandca.gov) or call (510) 238-4753 or 711 (for Relay Service) at

least five (5) working days before the meeting.

Si desea solicitar adaptaciones relacionadas con discapacidades, o para pedir un intérprete en español, Cantonés, Mandarín o de lenguaje de señas (ASL) por favor envíe un correo electrónico a [npond-danchik@oaklandca.gov](mailto:npond-danchik@oaklandca.gov) o llame al (510) 238-4753 o al 711 para servicio de retransmisión (Relay Service) por lo menos cinco (5) días hábiles antes de la reunión. Gracias.

需要殘障輔助設施, 手語, 西班牙語, 粵語或國語翻譯服務, 請在會議前五個工作天電郵 [npond-danchik@oaklandca.gov](mailto:npond-danchik@oaklandca.gov) 或致電 (510) 238-4753 或 711 (電話傳達服務). 請避免塗搽香氛產品, 參加者可能對化學成分敏感.

Để yêu cầu các phương tiện hỗ trợ phục vụ người khuyết tật hoặc yêu cầu thông dịch viên ASL, tiếng Quảng Đông, tiếng Quan Thoại hoặc tiếng Tây Ban Nha, vui lòng gửi email đến địa chỉ [npond-danchik@oaklandca.gov](mailto:npond-danchik@oaklandca.gov) hoặc gọi đến số 711 (với Dịch vụ Tiếp âm) ít nhất năm (5) ngày làm việc trước khi cuộc họp diễn ra.



**City of Oakland, Bicyclist & Pedestrian Advisory Commission**  
**DRAFT Minutes from the January 20<sup>th</sup>, 2022 meeting**  
**Teleconference**

Meeting agenda at <https://cao-94612.s3.amazonaws.com/documents/January-2022-BPAC-Meeting-Agenda.pdf>.

Meeting called to order at 6:00 pm by BPAC Chair Andrew Campbell.

**Item 1. Roll Call/Determination of Quorum**

At roll call, quorum was established with nine commissioners present (X).

Commissioners	Present
Andrew Campbell (Chair)	X
Alex Frank	X
Grey Gardner	X
Mike Lok	X
Phoenix Mangrum	X
David Ralston	X
Patricia Schader (Vice Chair)	X
Nick Whipps	X
Dianne Yee	X

- Other attendees: Jennifer Anderson, Jeff Appareti, Debbie Barragan, Emily Brady, Brian Brown, RB Burnette Jr, Andrew Charman, Hans Chavez Ferreyra, Keith Cormier, Danielle Dynes, Gordon Douglas, Kai Drekmeier, Ryan Fauver, Jose Feroso, Hancel Ferreyra, Ryan Flores, Will Freyman, Gilbert Gong, Merry Beth Gong, Rahul Gupta, Collette Hanna, Tegan Hoffmann, Tom Holub, Ryan Houriga, Chris Hwang, Hunter Irvin, Rocky Kamen-Rubio, Amanda Leahy, Nathan Leefer, Margaret Lehrkind, Jason Liao, Miles Lincoln, Deva Lowenthal, Kate Lydon, Lenore McDonald, Ann McMurdo, Peter Merholz, Therese Mitros, Diedra Moss, Karen Motlow, Ardash Pandit, Raphael Parker, Bret Peterson, Julianna Phillips, Robert Prinz, Sudip Ray, Treva Reid, Jose Resuleo, Edmund Rogers, Michael Rosenthal, Greg Rozmarynowycz, Morgan Solem, Georg Spies, Midori Tabata, Patrick Traughber, Phil Yip, Miriam Zamora-Kantor, Alex, John, Max D, telephone callers (6569, 1220)
- Staff: Sarah Fine, Ofurhe Igbinedion, Fred Kelley, Jason Patton, Noel Pond-Danchik, Maya Sapienza, Megan Wier, KTOP

**Item 2. Introductions and Welcoming New Commissioners**

Chair Andrew Campbell welcomed new commissioners Alex Frank and Nick Whipps. Commissioners introduced themselves, providing background about themselves and sharing their priorities and goals for the BPAC. OakDOT staff introduced themselves and read the names of the other meeting attendees.

**Item 3. Open Forum / Public Comment**

- George Spies spoke to the Telegraph Ave protected bike lanes in the Temescal District. He is a nearby resident on Webster St. He is supportive of the protected bike lanes but sees the plastic bollards creating negative feedback towards the project because of the bollards' visual impact. The bollards also create visual clutter that can be distracting, thus creating potential safety issues. He is seeing cut-through traffic on Webster St with people in a hurry and not stopping at stop signs.
- Adarsh Pandit asked why Oakland does not have modern roundabouts given the cost, safety, and greening benefits compared to traffic signals. He advocated for car-free areas in commercial districts like Lakeshore Ave, Piedmont Ave, downtown, and the Laurel. He spoke in favor of the safety benefits of protected bike lanes for separating bicyclists from drivers.
- RB Burnette identified two streets – Redding St and Quigley St between 35<sup>th</sup> Ave and High St – that were recently paved and need more speed humps to keep down speeding.
- Michael Rosenthal commented on the look and feel of the Telegraph Ave project in the Temescal, and how that project is pushing traffic into the neighborhoods. He lives near Alcatraz Ave and is concerned that a future phase of the Telegraph Ave project could push traffic into his neighborhood. He suggested bike routes on neighborhood streets rather than reducing the capacity of major streets like Telegraph Ave.
- Karen Motlow commented on traffic circle at Shafter Ave and Cavour St as not being proportioned properly. When drivers pass around the island they often come too close to the crosswalks. Additionally, the intersection of Telegraph Ave and 51<sup>st</sup> St is more complicated than ever, and she goes out of her way to avoid it. She asked that the plastic bollards not be replaced by concrete.
- Patrick Traugher spoke in support of protected bike lanes and traffic circles. The plastic bollards on Telegraph Ave should be replaced with planters filled with plants, flowers, and trees. The purpose of the Telegraph Ave project is to make it harder for people to drive and to speed and thus frustration from drivers should be expected.
- Rahul Gupta echoed Patrick Traugher's comments regarding the Telegraph Ave bike lanes. It is now a significantly better street for bicycling than it was ten years ago. Regarding Telegraph Ave and 51<sup>st</sup> St, if anything bike lanes are needed on 51<sup>st</sup> St. Rahul thanked the BPAC for supporting the Telegraph Ave projects. Regarding diversion, we should look to the larger goal of reducing traffic on both the main streets and in the neighborhoods.
- Jose Resuleo lives on Ney Ave and grew up in East Oakland. He is supportive of bicycling in that he did not have this opportunity when he was young. He is interested in reading the 2021 BPAC Chair's Report and having the Commission advance equity goals through its work.
- Brian Brown encouraged the City of Oakland to repair the bike lane on Mandela Pkwy between 34<sup>th</sup> and W Grand Ave. Half of the bike lane is unusable due to utility work.

#### Item 4. Approval of meeting minutes

- A motion to **adopt the Bicyclist & Pedestrian Advisory Commission meeting minutes from December 16<sup>th</sup>, 2021** was made (Frank), seconded (Schader), and approved by consent. Adopted minutes online at [www.oaklandbikes.info/BPAC](http://www.oaklandbikes.info/BPAC).

Speakers other than commissioners: None

#### Item 5. Renewal of Resolution to Continue Teleconference Meetings

The Commission considered renewing a resolution determining that conducting in-person meetings of the Bicyclist & Pedestrian Advisory Commission and its committees would present imminent risks to attendees'

health, and electing to continue conducting meetings using teleconferencing in accordance with California Government Code Section 54953(e), a provision of Assembly Bill 361 (AB-361).

- The Commission ***adopted a resolution determining that conducting in-person meetings of the Bicyclist & Pedestrian Advisory Commission and its Committees would present imminent risks to attendees' health, and electing to continue conducting meetings using teleconferencing in accordance with California Government Code Section 54953(e), a provision of AB-361.*** The motion was made (Frank), seconded (Ralston), and adopted by roll call vote with the following Commissioners voting in favor: Campbell, Frank, Gardner, Lok, Ralston, Schader, Whipps, and Yee.

The resolution is attached to these meeting minutes.

Speakers other than commissioners: None

## **Item 6. Nominations & Elections for BPAC Chair and Vice Chair**

Staff facilitated nominations and elections for 2022 BPAC Officers, following the process described in BPAC's By-Laws (<https://cao-94612.s3.amazonaws.com/documents/BPAC-By-Laws.pdf>).

Summary of Discussion:

- Chair Campbell nominated Commissioner Schader for Chair.
  - Vice Chair Schader accepted the nomination.
  - Chair Campbell spoke to Vice Chair Schader's strong service to the Commission as 2021 Vice Chair.
- A motion to ***elect Commissioner Patricia Schader as the 2022 BPAC Chair*** was made (Whipps), seconded (Gardner), and approved by Campbell, Frank, Gardner, Lok, Mangrum, Ralston, Schader, Whipps, and Yee.
- Chair Schader nominated Commissioner Yee for Vice Chair.
  - Commissioner Yee accepted the nomination.
  - Chair Schader noted the excellent job that Commissioner Yee has done as a Co-Chair of the Infrastructure Committee and that she will do an excellent job as Vice Chair of the Commission.
- A motion to ***elect Commissioner Dianne Yee as the 2022 BPAC Vice Chair*** was made (Schader), seconded (Frank), and approved by Campbell, Frank, Gardner, Lok, Mangrum, Ralston, Schader, Whipps, and Yee.

Speakers other than commissioners: None.

## **Item 7. Recent Bicyclist and Pedestrian Fatal Traffic Crashes**

Commissioner Schader referred attendees to the meeting agenda's section on recent fatal and other high-profile traffic crashes in Oakland involving bicyclists and pedestrians. Per the latest Oakland Police Department (OPD) information there were 25 confirmed traffic fatalities in 2021, eight of which involved a pedestrian, two involved a motorcyclist, one involved a scooterist, and two involved a bicyclist. This total does not include the Oct 28th crash at 7th St and Madison St where a pedestrian was transported to the

hospital with severe head injuries. No new bicyclist or pedestrian related crashes have been shared by OPD to OakDOT since the December 2021 BPAC Meeting Agenda was posted.

Summary of Discussion:

- None

Speakers other than commissioners: None

## **Item 8. Slow Streets – Essential Places Program Updates**

Megan Wier and Jason Patton, OakDOT staff in the Safe Streets Division, presented on upcoming changes to the Slow Streets – Essential Places Program in response to the ongoing and changing nature of the COVID-19 pandemic. Changes include removing the temporary Slow Streets and Essential Places materials, including temporary street closures, and shifting efforts to longer term strategies for pedestrian safety and neighborhood traffic calming. For more details, see [www.oaklandca.gov/projects/oakland-slow-streets](http://www.oaklandca.gov/projects/oakland-slow-streets). The presentation was included in the meeting agenda packet.

Summary of attendee discussion:

- Slow Streets were not used as much for recreating in the street in West and East Oakland as they have been in North Oakland. Slow Street Corridors should be kept in locations where they are highly used in North Oakland.
- Slow Streets Corridors should be made permanent including Tiffin Rd, Colby St, Ney Ave, and Shafter Ave. Colby St should be reclassified as a local street.
- The pandemic is still ongoing and space is still needed for pedestrians to physical distance.
- Slow Streets are used for students to commute to school.
- Neighbors living on or near popular Slow Streets Corridors in higher resourced neighborhoods should be empowered to own and maintain their own Slow Streets to reduce the burden on staff and allow the Slow Streets Corridors to continue.
- The Slow Streets barricades provide a major benefit for Ney Ave, especially with crime. The permanent traffic calming measures on Ney Ave are greatly appreciated and the barricades should remain in place permanently or until the permanent traffic calming is fully constructed.
- Wisconsin St should be removed as a Slow Street.
- Commenters reported that streets adjacent to Slow Streets including Lawton Ave, adjacent to Shafter Ave, and streets adjacent to Brookdale Ave, have had a rise in vehicular traffic and are negatively impacted by the adjacent Slow Street Corridors. OakDOT does not have Oakland specific data on how vehicle volumes on adjacent streets are affected by Slow Streets Corridors.
- The barricades should not be removed until after other traffic safety improvements are installed. It will be more difficult to install Slow Streets in the future after removing them now.
- The Slow Street corridors are dangerous because it is unsafe to have pedestrians in the road along with vehicles especially for vulnerable pedestrians including elderly people.
- The Slow Streets Corridors were positive overall but stopped working over time as more drivers began to ignore them and fewer pedestrians used them.
- Support was shown for a Slow Streets network. Slow Streets networks can and should work in tandem with Pop-Up Slow Streets.
- The design elements for the proposed Slow Streets Network will be largely the same to those described in the Neighborhood Bike Route Implementation Guide, however neighborhood context

will be considered more and the Slow Streets Network will be installed as a part of Five Year Paving Plan implementation.

- Neighborhood level planning efforts are needed.
- Staff efforts should be directed to traffic calming projects in the works.
- Support was expressed for installing more Essential Places improvements on the High Injury Network.
- Locations used by unhoused populations should be prioritized as Essential Places.
- Ten of the existing fifteen essential places locations have already been upgraded to more durable materials. Four have permanent improvements planned. One does not yet have a proposed permanent improvement. More will be planned and installed using both temporary and durable materials.
- Bold-thinking transit and active transportation infrastructure should be installed citywide.

Summary of commissioner discussion:

- The temporary Slow Streets materials should remain in place because they have helped address the citywide issue of speeding. East Oakland reacted differently to Slow Streets Corridors in that they were less used for recreating in the street but the barricades did help with slowing traffic.
- Staff is not proposing an option to keep the barricades in place. This decision has been almost a year in the making. Staff feels they do not have the resources to do the necessary neighborhood level planning they believe necessary to make the program work and thus have made the decision to remove the temporary materials and transition toward more permanent infrastructure.
- Whether to recommend that the corridors continue to be represented as Slow Streets on navigation maps is still under discussion.
- Temporary materials like flex posts should be used to implement traffic calming treatments quickly throughout the city and to install more Essential Places.
- Support was shown for the Pop-Up Slow Streets proposal including simplifying the process for residents to borrow materials for street closures.
- Through the proposed Pop-Up Slow Streets program, residents would be provided permits for recurring soft street closures, for instance, once a week throughout the summer, and staff would provide the barricades, signage, and other materials.
- Staff should have provided more space for community input before making the decision to move forward with Phase 3 of the Slow Streets – Essential Places Program.
- Each Slow Street should be studied individually to see if it should remain or be removed.
- Support was shown for Slow Streets Corridors as a way to radically change public space and rapidly implement car-free spaces. The energy and support for such spaces should be continued in some way like Oaklavia.
- At least three Essential Places should be installed in Deep East Oakland including at the 81<sup>st</sup> Ave Library, Roots Community Health Center on International Blvd and 99<sup>th</sup> Ave, and Alameda County Social Services off 85<sup>th</sup> Ave.
- Meeting attendees were encouraged to reach out to their councilmembers to share their comments on the Slow Streets – Essential Places program.
- Many surveys and a lot of outreach has been done over the course of the program. However, citywide surveys were not representative and the corridor level outreach was inconclusive.
- The Police Relations committee wanted to work to connect with OPD on the Slow Streets. Slow Streets should be considered as a long-term project.
- Maintenance needs to keep the Slow Streets program going are significant. OakDOT staff work overtime every day to maintain and replace the materials. This takes their time away from addressing traffic safety related service requests of which there is a long backlog. There are also

- tradeoffs in terms of time dedicated to planning, outreach, and design. While the materials are relatively cheap, the ongoing need to replace the materials has also been costly over time.
- Staff should upgrade to more durable but still quickly implementable materials such as type III barricades and flex posts.
  - Installing more durable materials requires a significant amount of community engagement that there is not staff capacity for.
  - Temporary barricades were installed at a time when traffic volumes dropped significantly and are now causing operational concerns at some intersections with major streets. These concerns could be addressed but would involve a significant amount of planning.
  - The City should increase the number of staff who plan, design, install, and maintain infrastructure to do more projects like Slow Streets – Essential Places.
  - OakDOT recently hired two traffic painters and two traffic maintenance staff and are working to fill vacancies.
- A motion to **recommend that OakDOT delay the reformulation of the Slow Streets – Essential Places program, given the disruption of COVID, to allow time for neighborhood level engagement** was made (Ralston), seconded (Frank), and approved by Frank, Gardner, Mangrum, Ralston, Schader, Whipps, and Yee. Commissioner Campbell abstained. Commissioner Lok was absent at the time of the vote.

Speakers other than commissioners: Jose Resuleo, George Spies, Karen Motlow, Alex, Tegan Hoffman, Chris Hwang, Andrew Charman, Ardarsh Pandit, Michael Rosenthal, Greg Rozmarynowycz, Morgan Solem, Robert Prinz, Collette Hanna, Miriam Zamora-Kantor, Patrick, Ann McMurdo, Caller 6569, Phil Yip, Miles Lincoln, Jose Feroso, Rahul Gupta

- A motion to **extend the meeting by 30 minutes** was made (Whipps), seconded (Frank), and approved unanimously.
- A motion to **extend the meeting until 9:15 minutes** was made (Mangrum), seconded (Frank), and approved unanimously.
- A motion to **extend the meeting by 30 minutes** was made (Campbell), seconded (Frank), and approved unanimously.

## Item 9. Committee Overviews, Report Backs, and New Assignments

This item was deferred until the February 2022 meeting.

## Item 10. Three-month look-ahead, suggestions for meeting topics, announcements

A three-month look-ahead was included in the meeting’s agenda packet.

### *Suggestions for meeting topics*

- Commissioner Gardner noted the recent request for a presentation from OPD and OakDOT regarding the investigation of fatal traffic crashes.

### *Announcements*

- Vice Chair Yee announced the BPAC Infrastructure Committee will meet on Thursday, January 27<sup>th</sup>, to review the 14<sup>th</sup> St Active Transportation Project and the Rapid Response Program. The Committee will meet again on Thursday, February 3<sup>rd</sup>, to review a 17<sup>th</sup> St bikeway design being developed by the Paving Program and the Town for All project.

Meeting adjourned at 9:41 pm.

#### **Attachments**

- Resolution to Continue Teleconference Meetings

Minutes recorded by Jason Patton, Bicycle and Pedestrian Program Supervisor, and Noel Pond-Danchik, Transportation Planner, emailed to meeting attendees for review on January 24, 2022 with comments requested by 5pm, February 7, 2022 to [NPond-Danchik@oaklandca.gov](mailto:NPond-Danchik@oaklandca.gov). Revised minutes will be attached to the February 2022 meeting agenda and considered for adoption at that meeting.

# OAKLAND BICYCLIST & PEDESTRIAN ADVISORY COMMISSION

## Meeting of February 17, 2021, Item #4

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**ADOPT A RESOLUTION DETERMINING THAT CONDUCTING IN-PERSON MEETINGS OF THE BICYCLIST & PEDESTRIAN ADVISORY COMMISSION AND ITS COMMITTEES WOULD PRESENT IMMINENT RISKS TO ATTENDEES' HEALTH, AND ELECTING TO CONTINUE CONDUCTING MEETINGS USING TELECONFERENCING IN ACCORDANCE WITH CALIFORNIA GOVERNMENT CODE SECTION 54953(e), A PROVISION OF AB-361.**

**WHEREAS**, on March 4, 2020, Governor Gavin Newsom declared a state of emergency related to COVID-19, pursuant to Government Code Section 8625, and such declaration has not been lifted or rescinded. See <https://www.gov.ca.gov/wp-content/uploads/2020/03/3.4.20-Coronavirus-SOE-Proclamation.pdf>; and

**WHEREAS**, on March 9, 2020, the City Administrator in their capacity as the Director of the Emergency Operations Center (EOC), issued a proclamation of local emergency due to the spread of COVID-19 in Oakland, and on March 12, 2020, the City Council passed Resolution No. 88075 C.M.S. ratifying the proclamation of local emergency pursuant to Oakland Municipal Code (O.M.C.) section 8.50.050(C); and

**WHEREAS**, City Council Resolution No. 88075 remains in full force and effect to date; and

**WHEREAS**, the Centers for Disease Control (CDC) recommends physical distancing of at least six (6) feet whenever possible, avoiding crowds, and avoiding spaces that do not offer fresh air from the outdoors, particularly for people who are not fully vaccinated or who are at higher risk of getting very sick from COVID-19. See <https://www.cdc.gov/coronavirus/2019-ncov/prevent-getting-sick/prevention.html>; and

**WHEREAS**, the CDC recommends that people who live with unvaccinated people avoid activities that make physical distancing hard. See <https://www.cdc.gov/coronavirus/2019-ncov/your-health/about-covid-19/caring-for-children/families.html>; and

**WHEREAS**, the CDC recommends that older adults limit in-person interactions as much as possible, particularly when indoors. See <https://www.cdc.gov/aging/covid19/covid19-older-adults.html>; and

**WHEREAS**, the CDC, the California Department of Public Health, and the Alameda County Public Health Department all recommend that people experiencing COVID-19 symptoms stay home. See <https://www.cdc.gov/coronavirus/2019-ncov/if-you-are-sick/steps-when-sick.html>; and

**WHEREAS**, persons without symptoms may be able to spread the COVID-19 virus. See <https://www.cdc.gov/coronavirus/2019-ncov/prevent-getting-sick/prevention.html>; and

**WHEREAS**, fully vaccinated persons who become infected with the COVID-19 Delta variant can spread the virus to others. See <https://www.cdc.gov/coronavirus/2019-ncov/vaccines/fully-vaccinated.html>; and

**WHEREAS**, the City's public-meeting facilities are indoor facilities that do not ensure circulation of fresh / outdoor air, particularly during periods of cold and/or rainy weather, and were not designed to ensure that attendees can remain six (6) feet apart; and

**WHEREAS**, holding in-person meetings would encourage community members to come to City facilities to participate in local government, and some of them would be at high risk of getting very sick from COVID-19 and/or would live with someone who is at high risk; and

**WHEREAS**, in-person meetings would tempt community members who are experiencing COVID-19 symptoms to leave their homes in order to come to City facilities and participate in local government; and

**WHEREAS**, attendees would use ride-share services and/or public transit to travel to in-person meetings, thereby putting them in close and prolonged contact with additional people outside of their households; and

**WHEREAS**, on October 21, 2021 the Bicyclist & Pedestrian Advisory Commission adopted a resolution determining that conducting in-person meetings would present imminent risks to attendees' health, and electing to continue conducting meetings using teleconferencing in accordance with California Government Code Section 54953(e), a provision of AB-361; now therefore be it:

**RESOLVED:** that the Bicyclist & Pedestrian Advisory Commission finds and determines that the foregoing recitals are true and correct and hereby adopts and incorporates them into this resolution; and be it

**FURTHER RESOLVED:** that, based on these determinations and consistent with federal, state and local health guidance, the Bicyclist & Pedestrian Advisory Commission renews its determination that conducting in-person meetings would pose imminent risks to the health of attendees; and be it

**FURTHER RESOLVED:** that the Bicyclist & Pedestrian Advisory Commission firmly believes that the community's health and safety and the community's right to participate in local government, are both critically important, and is committed to balancing the two by continuing to

use teleconferencing to conduct public meetings, in accordance with California Government Code Section 54953(e), a provision of AB-361; and be it

**FURTHER RESOLVED:** that the Bicyclist & Pedestrian Advisory Commission will renew these (or similar) findings at least every thirty (30) days in accordance with California Government Code section 54953(e) until the state of emergency related to COVID-19 has been lifted, or the Bicyclist & Pedestrian Advisory Commission finds that in-person meetings no longer pose imminent risks to the health of attendees, whichever occurs first.

# 14th Street Safety Project

Investing in 14th Street as a community destination for safe strolling, shopping, and biking



City of Oakland

Department of Transportation

## PROJECT INFORMATION:

In 2017 the City of Oakland won a **\$11 million** State grant to provide a once-in-a-generation investment in safety and community-driven aesthetic improvements on 14th Street From Brush Street to Lakeside Drive/Oak Street.

This grant is focused on improving safety on 14th Street for all roadway users - people visiting Downtown Oakland by car, on foot, by bike, or by bus.

During public outreach meetings in 2019, the City heard concern from the community regarding parking, roadway safety, providing benefits for small businesses, and cultural/aesthetic elements related to the Black Arts Movement Business District (BAMBD).

The City of Oakland Department of Transportation (OakDOT) is bringing an updated design, a Parking Management Plan, and Public Art component to the City of Oakland Public Works Committee on March 22, 2022 (tentative).



Contact: Charlie Ream - CReam@oaklandca.gov · Website: <https://www.oaklandca.gov/projects/14th-street> · Updated: 2/9/22 1

# 14th Street Safety Project

Investing in 14th Street as a community destination for safe strolling, shopping, and biking



City of Oakland

Department of Transportation

## TRAFFIC COLLISIONS



IN THE 5 YEARS SINCE THE CITY BEGAN PLANNING FOR 14TH STREET SAFETY UPGRADES IN 2016:

- » 2 people walking were killed by drivers on 14th Street - both were Asian seniors
- » Vehicle collisions injured 189 people, 38 of them seriously



### WHO IS AT RISK?

- » Older Oaklanders (65+) are **more than 2 times** as likely to be severely injured while walking
- » Asian pedestrians are **3.5 times more likely** to be killed while walking than other Oaklanders
- » Black pedestrians are **3 times more likely** to be severely injured or killed while walking than other Oaklanders

Source: Citywide crash analysis 2019

These trends predict that someone will be injured **every 9.5 days** by a collision on 14th until this project is constructed.

Contact: Charlie Ream - CReam@oaklandca.gov · Website: <https://www.oaklandca.gov/projects/14th-street> · Updated: 2/9/22 2

# 14th Street Safety Project

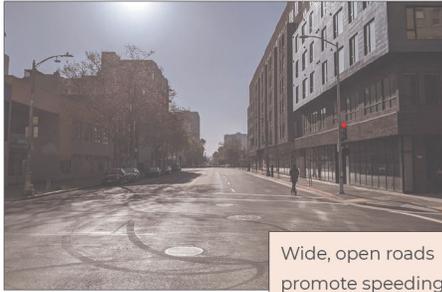
Investing in 14th Street as a community destination for safe strolling, shopping, and biking



City of Oakland

Department of Transportation

## SAFETY ISSUES ON 14TH STREET



Wide, open roads promote speeding



Frequent double-parking creates confusing/chaotic travel patterns



Wide pedestrian crossings without wheelchair-accessible curb ramps



No space for people biking on vital connection to Downtown for East and West Oaklanders



Sidewalks are narrow and often crowded/cluttered

Contact: Charlie Ream - CReam@oaklandca.gov · Website: <https://www.oaklandca.gov/projects/14th-street> · Updated: 2/9/22 3

# 14th Street Safety Project

Investing in 14th Street as a community destination for safe strolling, shopping, and biking



City of Oakland

Department of Transportation

## PROPOSED IMPROVEMENTS

This project represents a substantial investment in the 14th Street commercial corridor as a public space, a safe space, and an artistic space in our City. This State grant provides OakDOT with the resources to install the following elements, which would not be possible without this outside funding:

- » Protected bike lanes (roadway level)
- » Sidewalk-level bike lanes and wider sidewalks on core commercial blocks
- » Pedestrian, sidewalk, and bus stop lighting
- » Slower, calmer 2-lane roadway
- » Shorter pedestrian crossings
- » Expanded sidewalk space
- » Upgraded bus boarding areas
- » Improved wheelchair access
- » New landscaping and “rain gardens”
- » Additional street parking on parallel streets



Corner sidewalk widening + lights



Landscaping and greenery



Protected Bike Lanes



Contact: Charlie Ream - CReam@oaklandca.gov · Website: <https://www.oaklandca.gov/projects/14th-street> · Updated: 2/9/22 4

# 14th Street Safety Project

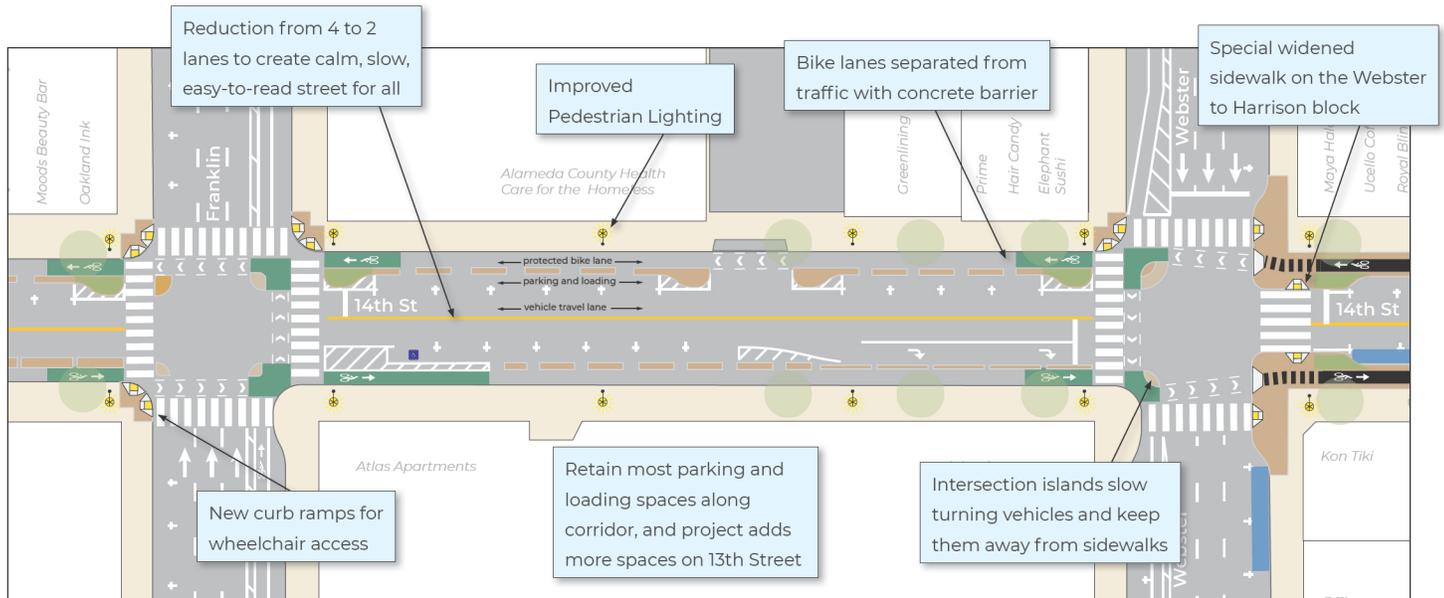
Investing in 14th Street as a community destination for safe strolling, shopping, and biking



City of Oakland

Department of Transportation

## TYPICAL BLOCK LAYOUT - FRANKLIN TO WEBSTER



Contact: Charlie Ream - CReam@oaklandca.gov · Website: <https://www.oaklandca.gov/projects/14th-street> · Updated: 2/9/22

# 14th Street Safety Project

Investing in 14th Street as a community destination for safe strolling, shopping, and biking

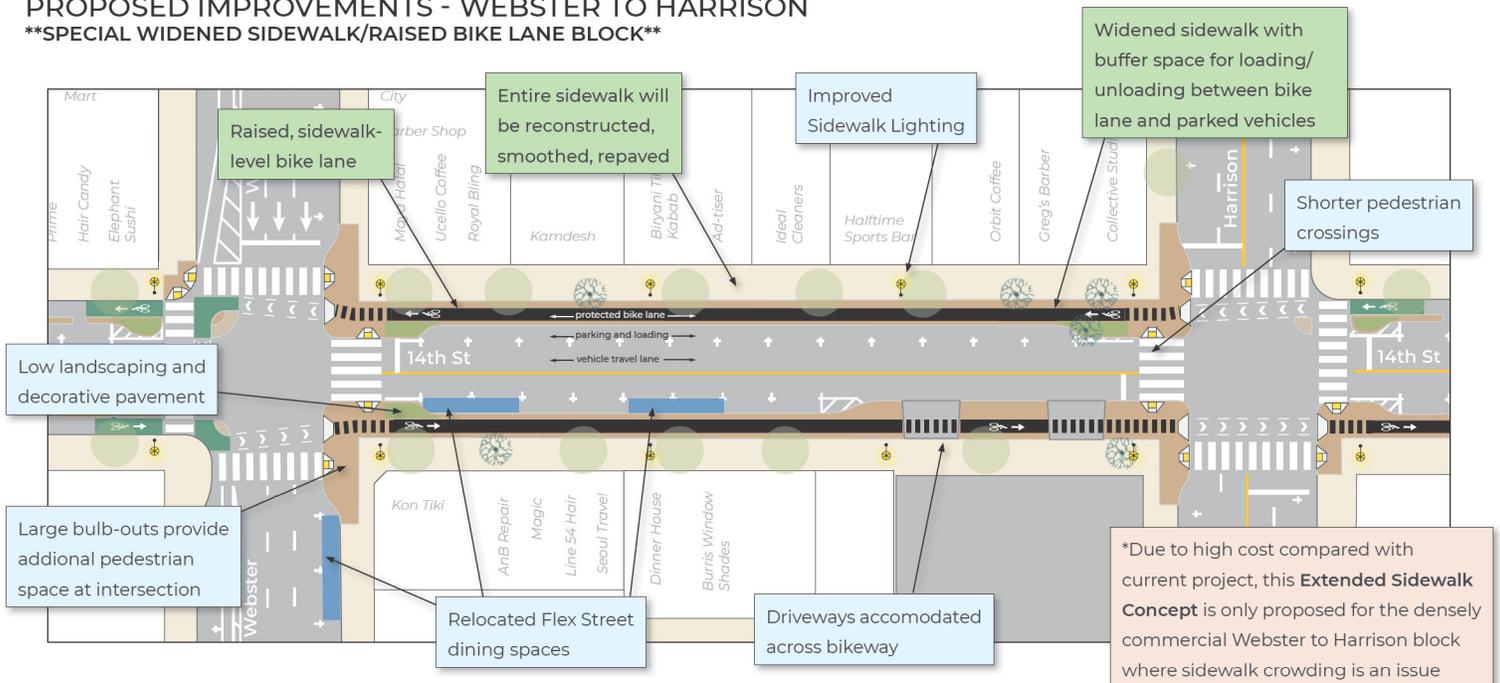


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Department of Transportation

## PROPOSED IMPROVEMENTS - WEBSTER TO HARRISON

**\*\*SPECIAL WIDENED SIDEWALK/RAISED BIKE LANE BLOCK\*\***



Contact: Charlie Ream - CReam@oaklandca.gov · Website: <https://www.oaklandca.gov/projects/14th-street> · Updated: 2/9/22

# 14th Street Safety Project

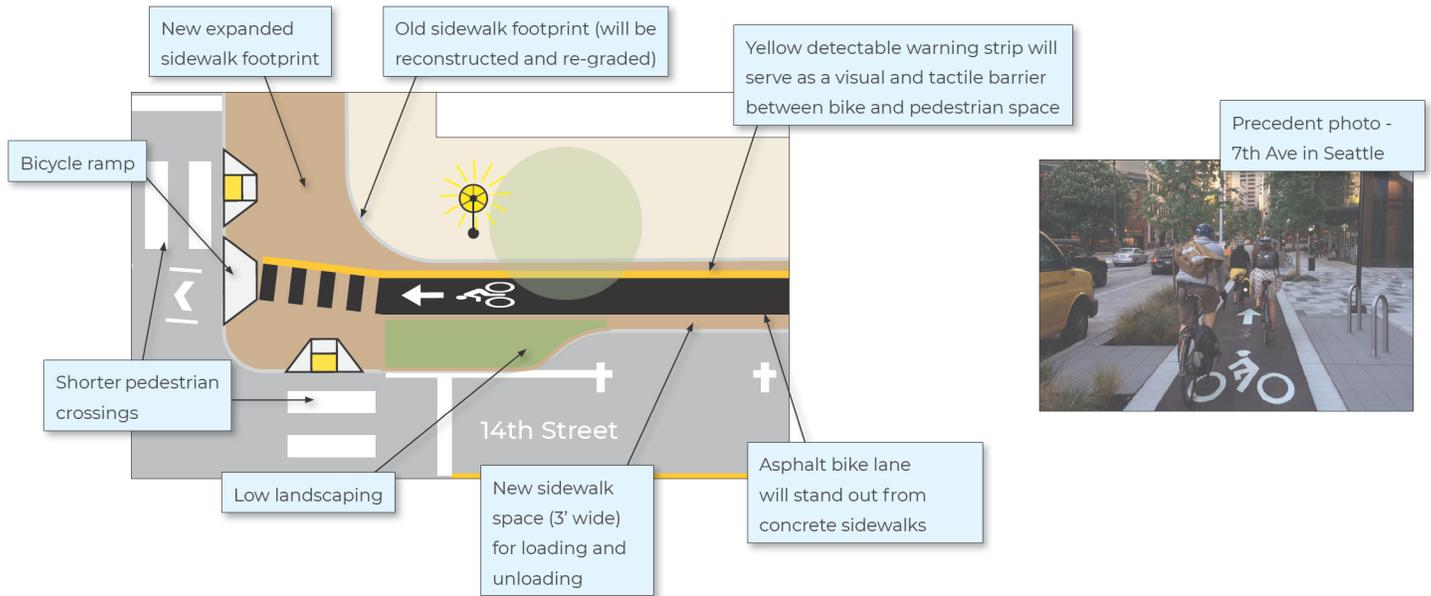
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## EXTENDED SIDEWALK CLOSE-UP



Contact: Charlie Ream - CReam@oaklandca.gov · Website: <https://www.oaklandca.gov/projects/14th-street> · Updated: 2/9/22

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# 14th Street Safety Project

Investing in 14th Street as a community destination for safe strolling, shopping, and biking



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## PARKING MANAGEMENT PLAN

OakDOT heard clearly from the community that parking, loading, and access to 14th Street for people driving is a core concern. To respond to these concerns, OakDOT developed a Parking Management Plan for this project which includes the following core elements:

- » **Discounted off-street parking for local small business-owners and employees** in the Harrison Street Garage at 13th/Harrison (35 monthly spaces available at 50% discount)
- » **New Public Street Parking** on 13th Street from Franklin to Oak, adding up to 53 angled spaces on 13th. 14th Street project improvements will remove 24 spaces, for a net gain of 29 spaces in the area.
- » **Commercial and Passenger Loading Zones** installed free of charge to support business operations and pickup/dropoff.
- » **Discounted Parking Validation** at either the Franklin Plaza Garage or the Harrison Street Garage, offered at a 50% discount for 14th Street merchants and small businesses.



13th and Harrison Garage location



Restripe 13th Street with angled parking on the south side of the street

Contact: Charlie Ream - CReam@oaklandca.gov · Website: <https://www.oaklandca.gov/projects/14th-street> · Updated: 2/9/22

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# 14th Street Safety Project

Investing in 14th Street as a community destination for safe strolling, shopping, and biking



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## PUBLIC ART

Located within the Economic and Workforce Development Department, the City of Oakland's Public Art Program commissions original works of art for public spaces throughout Oakland. Under the City's Public Art Ordinance, art projects are funded through a 1.5% allocation from all eligible City of Oakland capital improvement projects and eligible grant revenue.

The 14th Street Safety Project will work with the Public Art Program to provide a transparent and representative Public Art Process to design and install community-led artistic elements on 14th Street. This will be the first Public Art partnership between OakDOT and EWD and will inform future Public Art work on capital roadway projects.



East Oakland Sports Complex Mural  
Credit: Daniel Galvez and Jos Sances



Rainbow Power mosaic mural - Rainbow Rec Center. Credit: Johanna Poethig



Makkeweks Sculpture - Snow Park. Credit: WowHaus

Contact: Charlie Ream - CReam@oaklandca.gov · Website: <https://www.oaklandca.gov/projects/14th-street> · Updated: 2/9/22

# 14th Street Safety Project

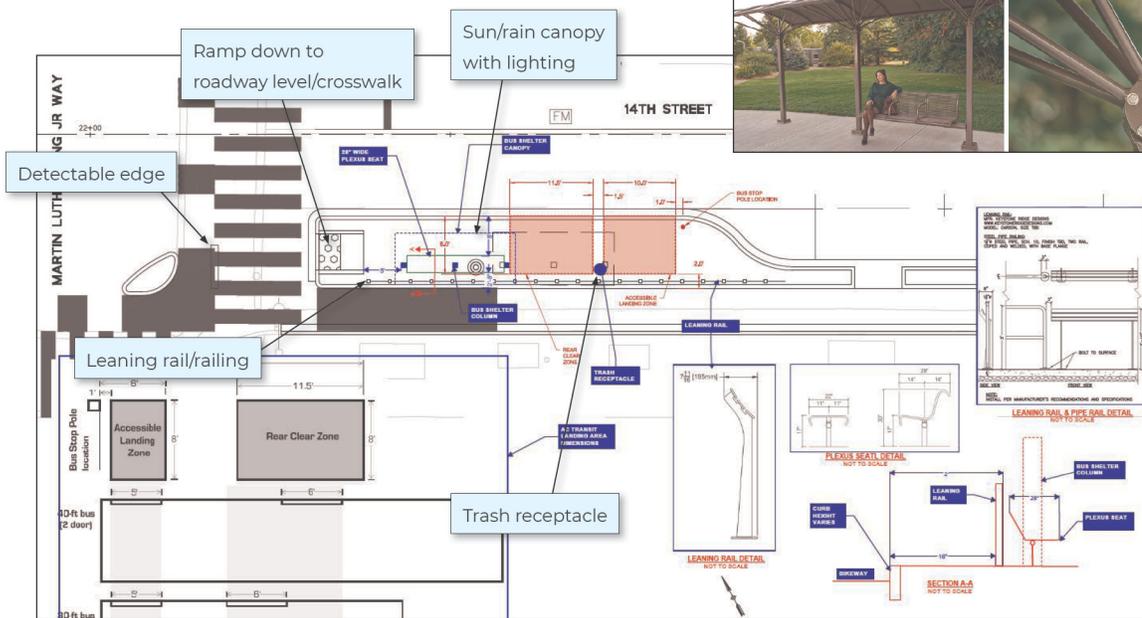
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## TRANSIT STOP AMENITIES



"Kaleidoscope" canopy example

Contact: Charlie Ream - CReam@oaklandca.gov · Website: <https://www.oaklandca.gov/projects/14th-street> · Updated: 2/9/22

# 14th Street Safety Project

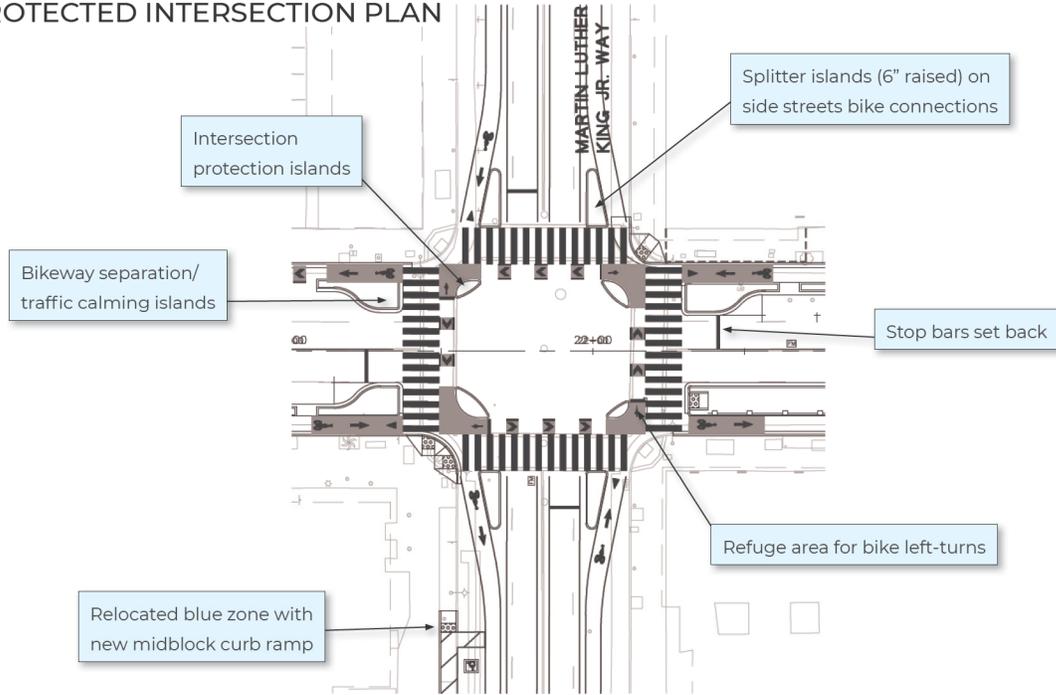
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## TYPICAL PROTECTED INTERSECTION PLAN



Contact: Charlie Ream - CReam@oaklandca.gov · Website: <https://www.oaklandca.gov/projects/14th-street> · Updated: 2/9/22

# 14th Street Safety Project

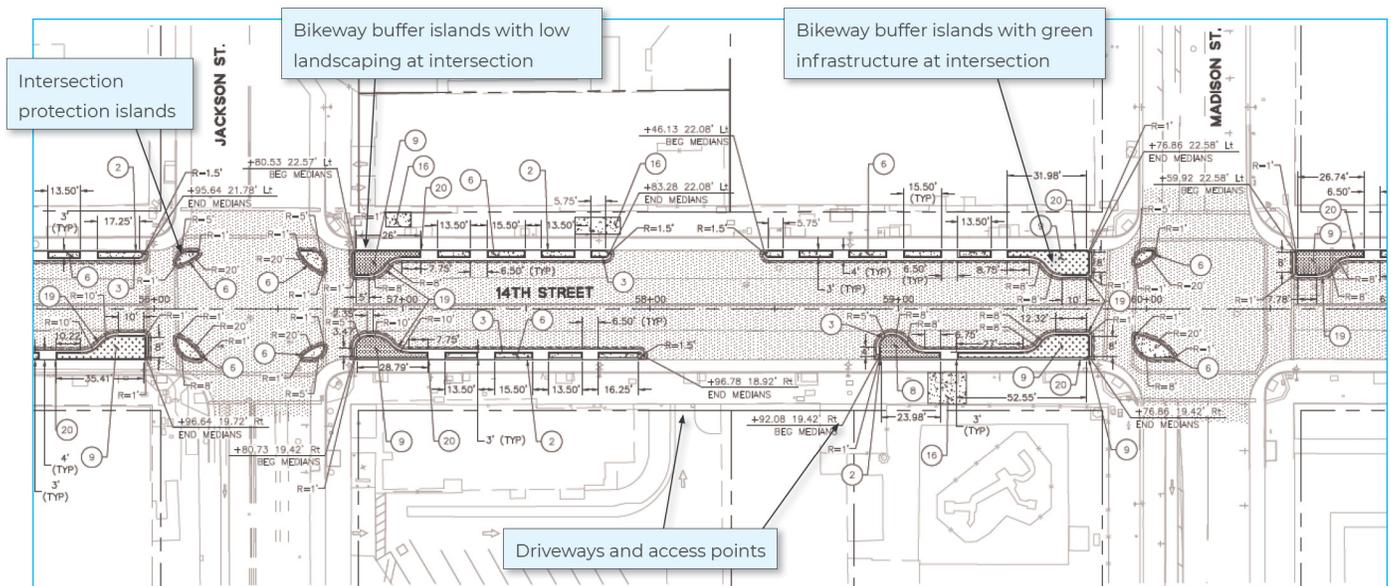
Investing in 14th Street as a community destination for safe strolling, shopping, and biking



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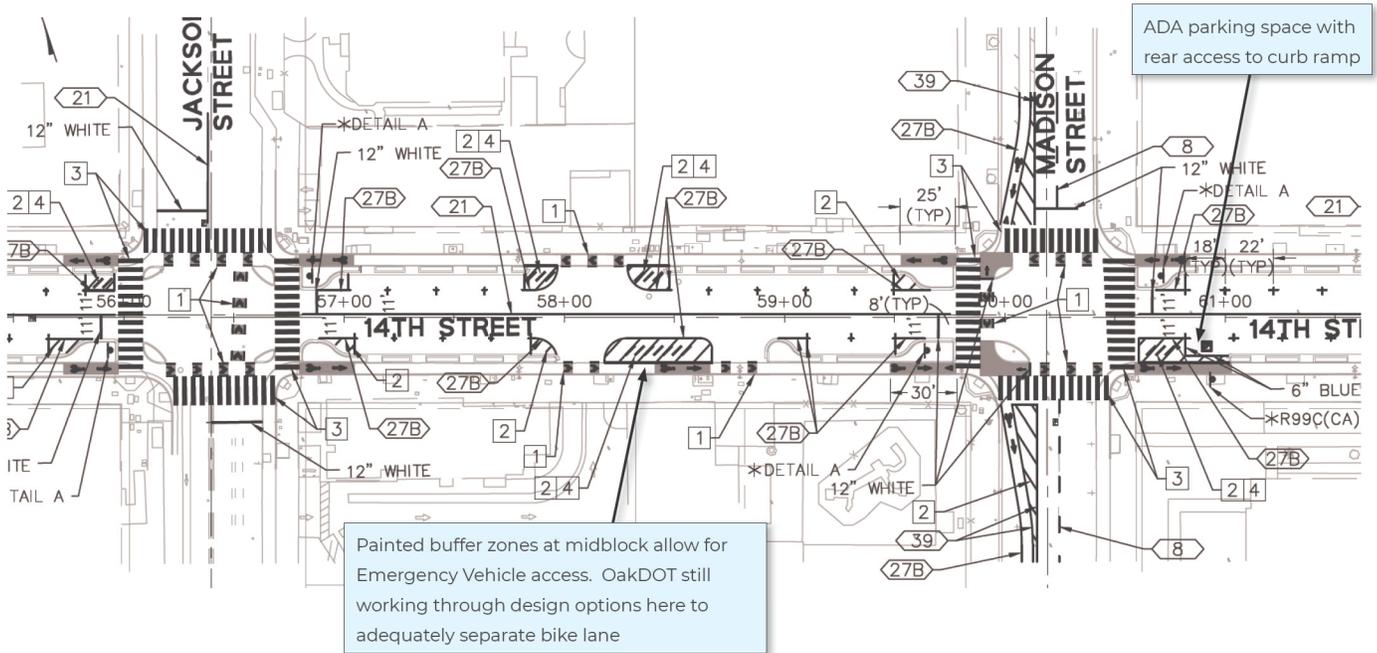
## TYPICAL PROTECTED BIKE LANE LAYOUT PLAN (CONCRETE IMPROVEMENTS)



Contact: Charlie Ream - CReam@oaklandca.gov · Website: <https://www.oaklandca.gov/projects/14th-street> · Updated: 2/9/22



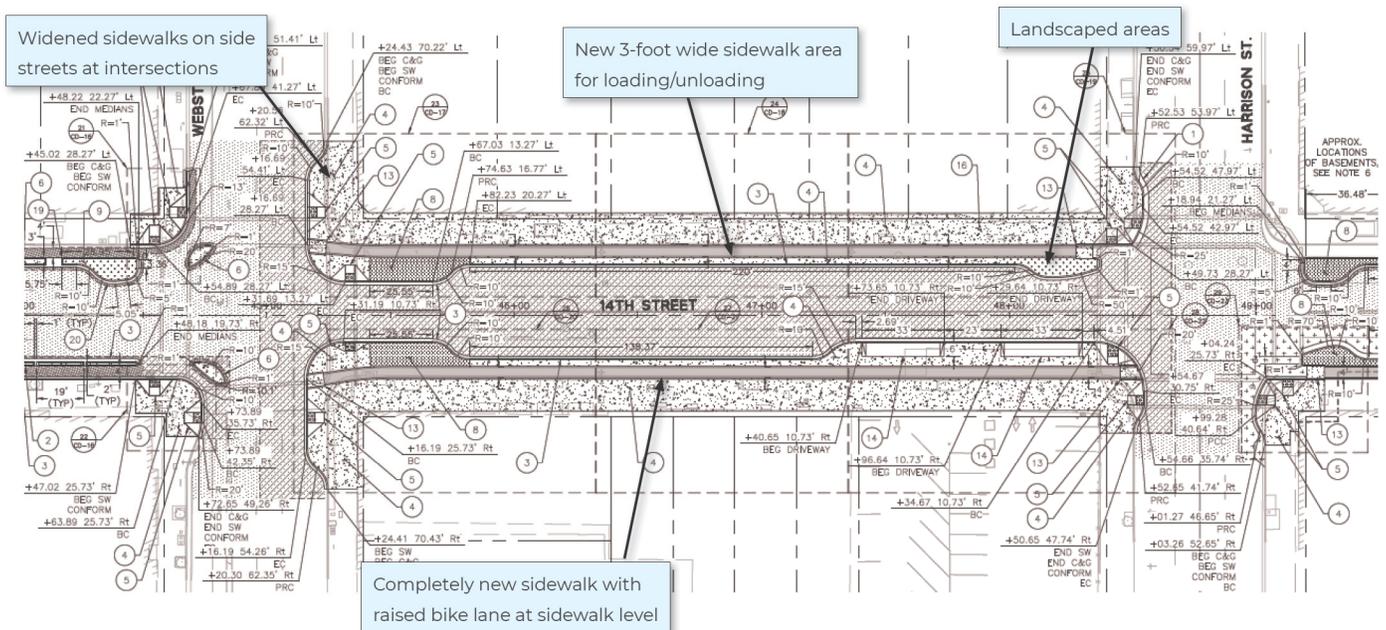
TYPICAL PROTECTED BIKE LANE LAYOUT PLAN (ROADWAY STRIPING)



Contact: Charlie Ream - CReam@oaklandca.gov · Website: <https://www.oaklandca.gov/projects/14th-street> · Updated: 2/9/22 13



WEBSTER TO HARRISON SIDEWALK-LEVEL BIKE LANE PLAN



Contact: Charlie Ream - CReam@oaklandca.gov · Website: <https://www.oaklandca.gov/projects/14th-street> · Updated: 2/9/22 14

## 14th Street Safety Project

Investing in 14th Street as a community destination for safe strolling, shopping, and biking



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### NEXT STEPS

- » March 22, 2022 - Public Works Committee Presentation (date tentative)
- » April 19, 2022 - Oakland City Council Presentation and Approval Action (date tentative)
- » March/April 2022 - 100% Design Plans
- » Summer 2022 - Advertise Project for Construction
- » Fall 2022 - Select winning construction bid and return to City Council to award construction contract
- » Fall/Winter 2022 - Construction notification and preparation
- » Late 2022/early 2023 - Construction begins!

## February 2022 BPAC Agenda Item 7. Committee Overviews, Report Backs, and New Assignments Attachment

For more information on the BPAC's Committees and Liaisons see

<https://www.oaklandca.gov/resources/bicyclist-and-pedestrian-advisory-commission-bpac-committees-and-liaisons>

### 2022 Active BPAC Committees/Task Forces/Liaisons

Committee Name / Liaison Role	Date Created	Purpose	Commissioners	Community Members
Infrastructure Committee	2/16/17	Review and comment on the design of projects	Ralston, Schader, <b>Yee</b>	George Naylor, <b>Robert Prinz</b> , Midori Tabata, Brendan Pittman, RB Burnette
Legislative Committee	6/21/18	Research and develop policy recommendations for consideration by the BPAC	<b>Gardner</b> , Lok, Mangrum	Kenya Wheeler
Liaison to Affordable Housing & Infrastructure Bond Public Oversight Committee	5/17/18	Monitor Committee activities and report back to the BPAC	Ralston	
Liaison to Mayor's Commission on Persons with Disabilities	5/17/18	Monitor MCPD activities and report back to the BPAC	Schader	
Open Forum Committee	3/17/16	Review and analyze comments received during Open Forum	Schader	<b>Midori Tabata</b>
Bicyclist Pedestrian Police Relations Committee	9/20/18	Rectify inequitable policing and racial profiling through analysis, dialog, and recommendations	Gardner, <b>Mangrum</b>	Tom Holub, George Naylor, Zachary Norris, Kenya Wheeler, RB Burnette
Planning Commission Review Committee	1/17/2019	Be a resource to the Planning Commission and provide input on bicycle and pedestrian elements of proposed projects	<b>Campbell</b> , Schader	George Naylor, Kenya Wheeler, RB Burnette
Strategic Plan Taskforce	1/30/2020	Draft and track the BPAC's Strategic Plans	Campbell, Gardner	

\*Committee Chairs in **bold**

## February 2022 BPAC Agenda Item 10. Three-month agenda look-ahead, suggestions for meeting topics, announcements Attachment

For the full list of requested items and other details on upcoming meeting planning, see the BPAC Scheduler at [https://docs.google.com/spreadsheets/d/1PmvGuKNg3lBspg7WwnqB7\\_MaQumB6BCpA\\_7Sbvuf8Q8/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1PmvGuKNg3lBspg7WwnqB7_MaQumB6BCpA_7Sbvuf8Q8/edit?usp=sharing)

### Three-month agenda look-ahead

#### March

- Bike to Work Day Planning
- Safe Oakland Streets Initiative Update
- San Pablo Ave Corridor Plan

#### April

- General Plan Update (tentative)
- Parking Enforcement Including Proposal to Add Parking Meters to Commercial Loading Zones (tentative)
- One Bay Area Grant (OBAG) Grant Application (tentative)

#### May

- School Safety Crossing Guards (tentative)
- Meeting with the Mayor & Transportation Advisor to the Mayor (tentative)
- Presentation from the Mayor's Commission on Aging (tentative)
- Annual Paving Update (tentative)
- Grand Ave Mobility Plan (tentative)

### Announcements

- **BPAC Agenda Sign-Up List:** To sign up to receive these BPAC agendas by email when available, go to <https://oaklandca19202.activehosted.com/f/20>.
- **Form 700:** All BPAC Commissioners must file their 2021-2022 Form 700 before April 1, 2022. You may file online (preferred) at <https://netfile.com/filer> or by mail filling out the pdf attached/available at [https://netfile.com/Filer/Content/SEI/docs/v2022/FPPC\\_700\\_2021-2022.pdf](https://netfile.com/Filer/Content/SEI/docs/v2022/FPPC_700_2021-2022.pdf) and printing, signing, and mailing it with a postmark no later than April 1, 2021 to the City of Oakland, Office of the City Clerk, 1 Frank H. Ogawa Plaza, Room 201, Oakland, CA 94612.
- **2022 5-Year Paving Plan Adopted:** On December 21, 2021, City Council adopted the 2022 5-Year Paving Plan, representing more than \$300M of paving construction and establishing a 350+ mile list of rehabilitation and preventative maintenance priorities. To read about the plan in detail please visit the 5-Year Plan website: <https://www.oaklandca.gov/projects/20225yp>
- **Affordable Housing and Sustainable Communities (AHSC) Grant Awarded:** The City of Oakland was recommended for the AHSC Cycle 6 grant awards, which we applied for in June 2021! We want to recognize this tremendous team effort across OakDOT teams, City Departments, and external agencies to support more affordable, connected, and sustainable housing in Oakland. With this cycle, we are proud to bring almost \$44 million in investments to Oakland where it's needed critically-- multigenerational, affordable, and secured housing for Oaklanders, caring for our seniors, and bettering the interconnection of our public transportation systems. OakDOT will receive \$2.2 million to meet funding gaps in two existing projects—14th St Safety Project and 27th St Complete Streets. To reach more about AHSC Grant Awarded projects, go to: <https://sgc.ca.gov/programs/ahsc/resources/awards-applications.html>
- **Oakland's Bicycle Network Recognized Nationally:** On January 26, 2022, the League of American Bicyclists (LAB) published a report titled "Benchmarking Bike Networks" on the importance of building bikeways as networks to increase bicycling rates and safety. Oakland is featured as one of five case study cities (along with Boston, Chicago, Austin, and Missoula). The report is available at <https://bikeleague.org/content/new-report-benchmarking-bike-networks>. More information on Oakland's bikeway network is available at: [www.oaklandca.gov/resources/bicycle-related-maps-and-data](http://www.oaklandca.gov/resources/bicycle-related-maps-and-data).

# 2021-2022 Statement of Economic Interests



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## Form 700

A Public Document

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### ***Helpful Resources***

- Video Tutorials
- Reference Pamphlet
- Excel Version
- FAQs
- Gift and Travel Fact Sheet for State and Local Officials

## California Fair Political Practices Commission

1102 Q Street, Suite 3000 • Sacramento, CA 95811

Email Advice: [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)

Toll-free advice line: 1 (866) ASK-FPPC • 1 (866) 275-3772

Telephone: (916) 322-5660 • Website: [www.fppc.ca.gov](http://www.fppc.ca.gov)

December 2021

## Quick Start Guide

Detailed instructions begin on page 3.

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### WHEN IS THE ANNUAL STATEMENT DUE?

- March 1 – Elected State Officers, Judges and Court Commissioners, State Board and Commission members listed in Government Code Section 87200
- April 1 – Most other filers

### WHERE DO I FILE?

Most people file the Form 700 with their agency. If you're not sure where to file your Form 700, contact your filing officer or the person who asked you to complete it.

### ITEMS TO NOTE!

- The Form 700 is a public document.
- Only filers serving in active military duty may receive an extension on the filing deadline.
- You must also report interests held by your spouse or registered domestic partner.
- Your agency's conflict of interest code will help you to complete the Form 700. You are encouraged to get your conflict of interest code from the person who asked you to complete the Form 700.

### NOTHING TO REPORT?

Mark the "No reportable interests" box on Part 4 of the Cover Page, and submit only the signed Cover Page. Please review each schedule carefully!

Schedule	Common Reportable Interests	Common Non-Reportable Interests
A-1: Investments	Stocks, including those held in an IRA or 401K. Each stock must be listed.	Insurance policies, government bonds, diversified mutual funds, funds similar to diversified mutual funds.
A-2: Business Entities/Trusts	Business entities, sole proprietorships, partnerships, LLCs, corporations and trusts. (e.g., Form 1099 filers).	Savings and checking accounts, and annuities.
B: Real Property	Rental property in filer's jurisdiction, or within two miles of the boundaries of the jurisdiction.	A residence used exclusively as a personal residence (such as a home or vacation property).
C: Income	Non-governmental salaries. Note that filers are required to report only half of their spouse's or partner's salary.	Governmental salary (from school district, for example).
D: Gifts	Gifts from businesses, vendors, or other contractors (meals, tickets, etc.).	Gifts from family members.
E: Travel Payments	Travel payments from third parties (not your employer).	Travel paid by your government agency.

**Note:** Like reportable interests, non-reportable interests may also create conflicts of interest and could be grounds for disqualification from certain decisions.

### QUESTIONS?

- [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)
- (866) 275-3772 Mon-Thurs, 9-11:30 a.m.

### E-FILING ISSUES?

- If using your agency's system, please contact technical support at your agency.
- If using FPPC's e-filing system, write to [form700@fppc.ca.gov](mailto:form700@fppc.ca.gov).

## What's New

### Gift Limit Increase

The gift limit increased to **\$520** for calendar years **2021** and **2022**. The gift limit in 2020 was **\$500**.

### Who must file:

- Elected and appointed officials and candidates listed in Government Code Section 87200
- Employees, appointed officials, and consultants filing pursuant to a conflict of interest code ("code filers"). **Obtain your disclosure categories, which describe the interests you must report, from your agency;** they are not part of the Form 700
- Candidates running for local elective offices that are designated in a conflict of interest code (e.g., county sheriffs, city clerks, school board trustees, and water board members)

#### Exception:

- Candidates for a county central committee are not required to file the Form 700
- Employees in newly created positions of existing agencies

For more information, see Reference Pamphlet, page 3, at [www.fppc.ca.gov](http://www.fppc.ca.gov).

### Where to file:

#### 87200 Filers

State offices	⇒	Your agency
Judicial offices	⇒	The clerk of your court
Retired Judges	⇒	Directly with FPPC
County offices	⇒	Your county filing official
City offices	⇒	Your city clerk
Multi-County offices	⇒	Your agency

#### Code Filers — State and Local Officials, Employees, and Consultants Designated in a Conflict of Interest

**Code:** File with your agency, board, or commission unless otherwise specified in your agency's code (e.g., Legislative staff files directly with FPPC). In most cases, the agency, board, or commission will retain the statements.

**Members of Newly Created Boards and Commissions:** File with your agency or with your agency's code reviewing body pursuant to Regulation 18754.

**Employees in Newly Created Positions of Existing Agencies:** File with your agency or with your agency's code reviewing body. (See Reference Pamphlet, page 3.)

Candidates file as follow:

State offices, Judicial offices and multi-county offices	⇒	County elections official with whom you file your declaration of candidacy
County offices	⇒	County elections official
City offices	⇒	City Clerk
Public Employee's Retirement System (CalPERS)	⇒	CalPERS
State Teacher's Retirement Board (CalSTRS)	⇒	CalSTRS

### How to file:

The Form 700 is available at [www.fppc.ca.gov](http://www.fppc.ca.gov). Form 700 schedules are also available in Excel format. Each Statement must have a handwritten "wet" signature or "secure electronic signature," meaning either (1) a signature submitted using an approved electronic filing system or (2) if permitted by the filing officer, a digital signature submitted via the filer's agency email address. (See Regulations 18104 and 18757.) Companies such as Adobe and DocuSign offer digital signature services. All statements are signed under the penalty of perjury and must be verified by the filer. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

### When to file:

#### Annual Statements

##### ⇒ March 1, 2022

- Elected State Officers
- Judges and Court Commissioners
- State Board and State Commission Members listed in Government Code Section 87200

##### ⇒ April 1, 2022

- Most other filers

Individuals filing under conflict of interest codes in city and county jurisdictions should verify the annual filing date with their filing official or filing officer.

Statements postmarked by the filing deadline are considered filed on time.

Statements of 30 pages or less may be emailed or faxed by the deadline as long as the originally signed paper version is sent by first class mail to the filing official within 24 hours.

#### Assuming Office and Leaving Office Statements

Most filers file within 30 days of assuming or leaving office or within 30 days of the effective date of a newly adopted or amended conflict of interest code.

#### Exception:

If you assumed office between October 1, 2021, and December 31, 2021, and filed an assuming office statement, you are not required to file an annual statement until March 1, 2023, or April 1, 2023, whichever is applicable. The annual statement will cover the day after you assumed office through December 31, 2022. (See Reference Pamphlet, page 6, for additional exceptions.)

#### Candidate Statements

File no later than the final filing date for the declaration of candidacy or nomination documents. A candidate statement is not required if you filed an assuming office or annual statement for the same jurisdiction within 60 days before filing a declaration of candidacy or other nomination documents.

#### Late Statements

**There is no provision for filing deadline extensions unless the filer is serving in active military duty. (See page 19 for information on penalties and fines.)**

#### Amendments

Statements may be amended at any time. You are only required to amend the schedule that needs to be revised. It is not necessary to amend the entire filed form. Obtain amendment schedules at [www.fppc.ca.gov](http://www.fppc.ca.gov).

## Types of Statements

### Assuming Office Statement:

If you are a newly appointed official or are newly employed in a position designated, or that will be designated, in a state or local agency's conflict of interest code, your assuming office date is the date you were sworn in or otherwise authorized to serve in the position. If you are a newly elected official, your assuming office date is the date you were sworn in.

- Report: Investments, interests in real property, and business positions held on the date you assumed the office or position must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date you assumed the office or position.

For positions subject to confirmation by the State Senate or the Commission on Judicial Appointments, your assuming office date is the date you were appointed or nominated to the position.

- Example: Maria Lopez was nominated by the Governor to serve on a state agency board that is subject to state Senate confirmation. The assuming office date is the date Maria's nomination is submitted to the Senate. Maria must report investments, interests in real property, and business positions she holds on that date, and income (including loans, gifts, and travel payments) received during the 12 months prior to that date.

If your office or position has been added to a newly adopted or newly amended conflict of interest code, use the effective date of the code or amendment, whichever is applicable.

- Report: Investments, interests in real property, and business positions held on the effective date of the code or amendment must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the effective date of the code or amendment.

### Annual Statement:

Generally, the period covered is January 1, 2021, through December 31, 2021. If the period covered by the statement is different than January 1, 2021, through December 31, 2021, (for example, you assumed office between October 1, 2020, and December 31, 2020 or you are combining statements), you must specify the period covered.

- Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement must be reported. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2021.

- If your disclosure category changes during a reporting period, disclose under the old category until the effective date of the conflict of interest code amendment and disclose under the new disclosure category through the end of the reporting period.

### Leaving Office Statement:

Generally, the period covered is January 1, 2021, through the date you stopped performing the duties of your position. If the period covered differs from January 1, 2021, through the date you stopped performing the duties of your position (for example, you assumed office between October 1, 2020, and December 31, 2020, or you are combining statements), the period covered must be specified. The reporting period can cover parts of two calendar years.

- Report: Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2021.

### Candidate Statement:

If you are filing a statement in connection with your candidacy for state or local office, investments, interests in real property, and business positions held on the date of filing your declaration of candidacy must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date of filing your declaration of candidacy is reportable. Do not change the preprinted dates on Schedules A-1, A-2, and B.

Candidates running for local elective offices (e.g., county sheriffs, city clerks, school board trustees, or water district board members) must file candidate statements, as required by the conflict of interest code for the elected position. The code may be obtained from the agency of the elected position.

### Amendments:

If you discover errors or omissions on any statement, file an amendment as soon as possible. You are only required to amend the schedule that needs to be revised; it is not necessary to refile the entire form. Obtain amendment schedules from the FPPC website at [www.fppc.ca.gov](http://www.fppc.ca.gov).

**Note:** Once you file your statement, you may not withdraw it. All changes must be noted on amendment schedules.

### Expanded Statement:

If you hold multiple positions subject to reporting requirements, you may be able to file an expanded statement for each position, rather than a separate and distinct statement for each position. The expanded statement must cover all reportable interests for all jurisdictions and list all positions for which it is filed. The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1

# Instructions Cover Page

Enter your name, mailing address, and daytime telephone number in the spaces provided. **Because the Form 700 is a public document, you may list your business/office address instead of your home address.**

## Part 1. Office, Agency, or Court

- Enter the name of the office sought or held, or the agency or court. Consultants must enter the public agency name rather than their private firm's name. (Examples: State Assembly; Board of Supervisors; Office of the Mayor; Department of Finance; Hope County Superior Court).
- Indicate the name of your division, board, or district, if applicable. (Examples: Division of Waste Management; Board of Accountancy; District 45). **Do not use acronyms.**
- Enter your position title. (Examples: Director; Chief Counsel; City Council Member; Staff Services Analyst).
- If you hold multiple positions (i.e., a city council member who also is a member of a county board or commission) you may be required to file separate and distinct statements with each agency. To simplify your filing obligations, in some cases you may instead complete a single expanded statement and file it with each agency.
  - The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1. To file an expanded statement for multiple positions, enter the name of each agency with which you are required to file and your position title with each agency in the space provided. **Do not use acronyms.** Attach an additional sheet if necessary. Complete one statement disclosing all reportable interests for all jurisdictions. Then file the expanded statement with each agency as directed by Regulation 18723.1(c).

If you assume or leave a position after a filing deadline, you must complete a separate statement. For example, a city council member who assumes a position with a county special district after the April annual filing deadline must file a separate assuming office statement. In subsequent years, the city council member may expand their annual filing to include both positions.

### Example:

Brian Bourne is a city council member for the City of Lincoln and a board member for the Camp Far West Irrigation District – a multi-county agency that covers the Counties of Placer and Yuba. The City is located within Placer County. Brian may complete one expanded statement to disclose all reportable interests for both offices and list both positions on the Cover Page. Brian will file the expanded statement with each the City and the District as directed by Regulation 18723.1(c).

## Part 2. Jurisdiction of Office

- Check the box indicating the jurisdiction of your agency and, if applicable, identify the jurisdiction. Judges, judicial candidates, and court commissioners have statewide jurisdiction. All other filers should review the Reference Pamphlet, page 13, to determine their jurisdiction.
- If your agency is a multi-county office, list each county in which your agency has jurisdiction.

- If your agency is not a state office, court, county office, city office, or multi-county office (e.g., school districts, special districts and JPAs), check the “other” box and enter the county or city in which the agency has jurisdiction.

### Example:

This filer is a member of a water district board with jurisdiction in portions of Yuba and Sutter Counties.

<b>1. Office, Agency, or Court</b>	
Agency Name (Do not use acronyms) Feather River Irrigation District	
Division, Board, Department, District, if applicable N/A	Your Position Board Member
▶ If filing for multiple positions, list below or on an attachment. (Do not use acronyms)	
Agency: N/A	Position:
<b>2. Jurisdiction of Office (Check at least one box)</b>	
<input type="checkbox"/> State	<input type="checkbox"/> Judge or Court Commissioner (Statewide Jurisdiction)
<input checked="" type="checkbox"/> Multi-County Yuba & Sutter Counties	<input type="checkbox"/> County of _____
<input type="checkbox"/> City of _____	<input type="checkbox"/> Other _____

## Part 3. Type of Statement

Check at least one box. The period covered by a statement is determined by the type of statement you are filing. If you are completing a 2021 annual statement, **do not** change the pre-printed dates to reflect 2022. Your annual statement is used for reporting the **previous year's** economic interests. Economic interests for your annual filing covering January 1, 2022, through December 31, 2022, will be disclosed on your statement filed in 2023. See Reference Pamphlet, page 4.

Combining Statements: Certain types of statements for the same position may be combined. For example, if you leave office after January 1, but before the deadline for filing your annual statement, you may combine your annual and leaving office statements. File by the earliest deadline. Consult your filing officer or the FPPC.

## Part 4. Schedule Summary

- Complete the Schedule Summary after you have reviewed each schedule to determine if you have reportable interests.
- Enter the total number of completed pages including the cover page and either check the box for each schedule you use to disclose interests; **or** if you have nothing to disclose on any schedule, check the “No reportable interests” box. Please **do not** attach any blank schedules.

## Part 5. Verification

Complete the verification by signing the statement and entering the date signed. Each statement must have an original “wet” signature unless filed with a secure electronic signature. (See page 3 above.) All statements must be signed under penalty of perjury and be verified by the filer pursuant to Government Code Section 81004. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

**When you sign your statement, you are stating, under penalty of perjury, that it is true and correct.** Only the filer has authority to sign the statement. An unsigned statement is not considered filed and you may be subject to late filing penalties.

## Instructions – Schedules A-1 and A-2 Investments

“Investment” means a financial interest in any business entity (including a consulting business or other independent contracting business) that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency’s jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more at any time during the reporting period. (See Reference Pamphlet, page 13.)

### Reportable investments include:

- Stocks, bonds, warrants, and options, including those held in margin or brokerage accounts and managed investment funds (See Reference Pamphlet, page 13.)
- Sole proprietorships
- Your own business or your spouse’s or registered domestic partner’s business (See Reference Pamphlet, page 8, for the definition of “business entity.”)
- Your spouse’s or registered domestic partner’s investments even if they are legally separate property
- Partnerships (e.g., a law firm or family farm)
- Investments in reportable business entities held in a retirement account (See Reference Pamphlet, page 15.)
- If you, your spouse or registered domestic partner, and dependent children together had a 10% or greater ownership interest in a business entity or trust (including a living trust), you must disclose investments held by the business entity or trust. (See Reference Pamphlet, page 16, for more information on disclosing trusts.)
- Business trusts

### You are not required to disclose:

- Government bonds, diversified mutual funds, certain funds similar to diversified mutual funds (such as exchange traded funds) and investments held in certain retirement accounts. (See Reference Pamphlet, page 13.) (Regulation 18237)
- Bank accounts, savings accounts, money market accounts and certificates of deposits
- Insurance policies
- Annuities
- Commodities
- Shares in a credit union
- Government bonds (including municipal bonds)

### Reminders

- Do you know your agency’s jurisdiction?
- Did you hold investments at any time during the period covered by this statement?
- Code filers – your disclosure categories may only require disclosure of specific investments.

- Retirement accounts invested in non-reportable interests (e.g., insurance policies, mutual funds, or government bonds) (See Reference Pamphlet, page 15.)
- Government defined-benefit pension plans (such as CalPERS and CalSTRS plans)
- Certain interests held in a blind trust (See Reference Pamphlet, page 16.)

**Use Schedule A-1** to report ownership of less than 10% (e.g., stock). Schedule C (Income) may also be required if the investment is not a stock or corporate bond. (See second example below.)

**Use Schedule A-2** to report ownership of 10% or greater (e.g., a sole proprietorship).

### To Complete Schedule A-1:

Do not attach brokerage or financial statements.

- Disclose the name of the business entity.
- Provide a general description of the business activity of the entity (e.g., pharmaceuticals, computers, automobile manufacturing, or communications).
- Check the box indicating the highest fair market value of your investment during the reporting period. If you are filing a candidate or an assuming office statement, indicate the fair market value on the filing date or the date you took office, respectively. (See page 20 for more information.)
- Identify the nature of your investment (e.g., stocks, warrants, options, or bonds).
- An acquired or disposed of date is only required if you initially acquired or entirely disposed of the investment interest during the reporting period. The date of a stock dividend reinvestment or partial disposal is not required. Generally, these dates will not apply if you are filing a candidate or an assuming office statement.

### Examples:

Frank Byrd holds a state agency position. His conflict of interest code requires full disclosure of investments. Frank must disclose his stock holdings of \$2,000 or more in any company that is located in or does business in California, as well as those stocks held by his spouse or registered domestic partner and dependent children.

Alice Lance is a city council member. She has a 4% interest, worth \$5,000, in a limited partnership located in the city. Alice must disclose the partnership on Schedule A-1 and income of \$500 or more received from the partnership on Schedule C.

## Instructions – Schedule A-2

### Investments, Income, and Assets of Business Entities/Trusts

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Use Schedule A-2 to report investments in a business entity (including a consulting business or other independent contracting business) or trust (including a living trust) in which you, your spouse or registered domestic partner, and your dependent children, together or separately, had a 10% or greater interest, totaling \$2,000 or more, during the reporting period and which is located in, doing business in, planning to do business in, or which has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 13.) A trust located outside your agency's jurisdiction is reportable if it holds assets that are located in or doing business in the jurisdiction. Do not report a trust that contains non-reportable interests. For example, a trust containing only your personal residence not used in whole or in part as a business, your savings account, and some municipal bonds, is not reportable.

Also report on Schedule A-2 investments and real property held by that entity or trust if your pro rata share of the investment or real property interest was \$2,000 or more during the reporting period.

#### To Complete Schedule A-2:

**Part 1.** Disclose the name and address of the business entity or trust. If you are reporting an interest in a business entity, check "Business Entity" and complete the box as follows:

- Provide a general description of the business activity of the entity.
- Check the box indicating the highest fair market value of your investment during the reporting period.
- If you initially acquired or entirely disposed of this interest during the reporting period, enter the date acquired or disposed.
- Identify the nature of your investment.
- Disclose the job title or business position you held with the entity, if any (i.e., if you were a director, officer, partner, trustee, employee, or held any position of management). A business position held by your spouse is not reportable.

**Part 2.** Check the box indicating **your pro rata** share of the **gross** income received **by** the business entity or trust. This amount includes your pro rata share of the **gross** income **from** the business entity or trust, as well as your community property interest in your spouse's or registered domestic partner's share. Gross income is the total amount of income before deducting expenses, losses, or taxes.

**Part 3.** Disclose the name of each source of income that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency's jurisdiction, as follows:

- Disclose each source of income and outstanding loan **to the business entity or trust** identified in Part 1 if your pro rata share of the **gross** income (including your community property interest in your spouse's or registered domestic partner's share) to the business entity or trust from that source was \$10,000 or more during the reporting period. (See Reference Pamphlet, page 11, for examples.) Income from governmental sources may be reportable if not considered salary. See Regulation 18232. Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.
- Disclose each individual or entity that was a source of commission income of \$10,000 or more during the reporting period through the business entity identified in Part 1. (See Reference Pamphlet, page 8.)

You may be required to disclose sources of income located outside your jurisdiction. For example, you may have a client who resides outside your jurisdiction who does business on a regular basis with you. Such a client, if a reportable source of \$10,000 or more, must be disclosed.

Mark "None" if you do not have any reportable \$10,000 sources of income to disclose. Phrases such as "various clients" or "not disclosing sources pursuant to attorney-client privilege" are not adequate disclosure. (See Reference Pamphlet, page 14, for information on procedures to request an exemption from disclosing privileged information.)

**Part 4.** Report any investments or interests in real property held or leased **by the entity or trust** identified in Part 1 if your pro rata share of the interest held was \$2,000 or more during the reporting period. Attach additional schedules or use FPPC's Form 700 Excel spreadsheet if needed.

- Check the applicable box identifying the interest held as real property or an investment.
- If investment, provide the name and description of the business entity.
- If real property, report the precise location (e.g., an assessor's parcel number or address).
- Check the box indicating the highest fair market value of your interest in the real property or investment during the reporting period. (Report the fair market value of the portion of your residence claimed as a tax deduction if you are utilizing your residence for business purposes.)
- Identify the nature of your interest.
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property or investment during the reporting period.

## Instructions – Schedule B Interests in Real Property

Report interests in real property located in your agency's jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more any time during the reporting period. Real property is also considered to be "within the jurisdiction" of a local government agency if the property or any part of it is located within two miles outside the boundaries of the jurisdiction or within two miles of any land owned or used by the local government agency. (See Reference Pamphlet, page 13.)

### Interests in real property include:

- An ownership interest (including a beneficial ownership interest)
- A deed of trust, easement, or option to acquire property
- A leasehold interest (See Reference Pamphlet, page 14.)
- A mining lease
- An interest in real property held in a retirement account (See Reference Pamphlet, page 15.)
- An interest in real property held by a business entity or trust in which you, your spouse or registered domestic partner, and your dependent children together had a 10% or greater ownership interest (Report on Schedule A-2.)
- Your spouse's or registered domestic partner's interests in real property that are legally held separately by him or her

### You are **not** required to report:

- A residence, such as a home or vacation cabin, used exclusively as a personal residence (However, a residence in which you rent out a room or for which you claim a business deduction may be reportable. If reportable, report the fair market value of the portion claimed as a tax deduction.)
- Some interests in real property held through a blind trust (See Reference Pamphlet, page 16.)
  - **Please note:** A non-reportable property can still be grounds for a conflict of interest and may be disqualifying.

### To Complete Schedule B:

- Report the precise location (e.g., an assessor's parcel number or address) of the real property.
- Check the box indicating the fair market value of your interest in the property (regardless of what you owe on the property).
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property during the reporting period.
- Identify the nature of your interest. If it is a leasehold,

### Reminders

- Income and loans already reported on Schedule B are not also required to be reported on Schedule C.
- Real property already reported on Schedule A-2, Part 4 is not also required to be reported on Schedule B.
- Code filers – do your disclosure categories require disclosure of real property?

disclose the number of years remaining on the lease.

- If you received rental income, check the box indicating the gross amount you received.
- If you had a 10% or greater interest in real property and received rental income, list the name of the source(s) if your pro rata share of the gross income from any single tenant was \$10,000 or more during the reporting period. If you received a total of \$10,000 or more from two or more tenants acting in concert (in most cases, this will apply to married couples), disclose the name of each tenant. Otherwise, mark "None."
- Loans from a private lender that total \$500 or more and are secured by real property may be reportable. **Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.**

When reporting a loan:

- Provide the name and address of the lender.
- Describe the lender's business activity.
- Disclose the interest rate and term of the loan. For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period. The term of a loan is the total number of months or years given for repayment of the loan at the time the loan was established.
- Check the box indicating the highest balance of the loan during the reporting period.
- Identify a guarantor, if applicable.

If you have more than one reportable loan on a single piece of real property, report the additional loan(s) on Schedule C.

### Example:

Allison Gande is a city planning commissioner. During the reporting period, she received rental income of \$12,000, from a single tenant who rented property she owned in the city's jurisdiction. If Allison received \$6,000 each from two tenants, the tenants' names would not be required because no single tenant paid her \$10,000 or more. A married couple is considered a single tenant.

ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS <b>4600 24th Street</b>	
CITY <b>Sacramento</b>	
FAIR MARKET VALUE <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: ____/____/XX    ____/____/XX ACQUIRED    DISPOSED
NATURE OF INTEREST <input type="checkbox"/> Ownership/Deed of Trust <input type="checkbox"/> Easement <input type="checkbox"/> Leasehold    Yrs. remaining: _____ <input type="checkbox"/> Other	
IF RENTAL PROPERTY, GROSS INCOME RECEIVED <input type="checkbox"/> \$0 - \$499 <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000	
SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more. <input type="checkbox"/> None <b>Henry Wells</b>	
NAME OF LENDER* <b>Sophia Petroillo</b>	
ADDRESS (Business Address Acceptable) <b>2121 Blue Sky Parkway, Sacramento</b>	
BUSINESS ACTIVITY, IF ANY, OF LENDER <b>Restaurant Owner</b>	
INTEREST RATE <b>8</b> % <input type="checkbox"/> None	TERM (Months/Years) <b>15</b> Years
HIGHEST BALANCE DURING REPORTING PERIOD <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000	
<input type="checkbox"/> Guarantor, if applicable	
Comments: _____	

# Instructions – Schedule C

## Income, Loans, & Business Positions

### (Income Other Than Gifts and Travel Payments)

#### Reporting Income:

Report the source and amount of gross income of \$500 or more you received during the reporting period. Gross income is the total amount of income before deducting expenses, losses, or taxes and includes loans other than loans from a commercial lending institution. (See Reference Pamphlet, page 11.) You must also report the source of income to your spouse or registered domestic partner if your community property share was \$500 or more during the reporting period.

The source and income must be reported only if the source is located in, doing business in, planning to do business in, or has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 13.) Reportable sources of income may be further limited by your disclosure category located in your agency's conflict of interest code.

#### Reporting Business Positions:

You must report your job title with each reportable business entity even if you received no income during the reporting period. Use the comments section to indicate that no income was received.

#### Commonly reportable income and loans include:

- Salary/wages, per diem, and reimbursement for expenses including travel payments provided by your employer
- Community property interest (50%) in your spouse's or registered domestic partner's income - **report the employer's name and all other required information**
- Income from investment interests, such as partnerships, reported on Schedule A-1
- Commission income not required to be reported on Schedule A-2 (See Reference Pamphlet, page 8.)
- Gross income from any sale, including the sale of a house or car (Report your pro rata share of the total sale price.)
- Rental income not required to be reported on Schedule B
- Prizes or awards not disclosed as gifts
- Payments received on loans you made to others
- An honorarium received prior to becoming a public official (See Reference Pamphlet, page 10.)
- Incentive compensation (See Reference Pamphlet, page 12.)

#### Reminders

- Code filers – your disclosure categories may not require disclosure of all sources of income.
- If you or your spouse or registered domestic partner are self-employed, report the business entity on Schedule A-2.
- Do not disclose on Schedule C income, loans, or business positions already reported on Schedules A-2 or B.

#### You are not required to report:

- Salary, reimbursement for expenses or per diem, or social security, disability, or other similar benefit payments received by you or your spouse or registered domestic partner from a federal, state, or local government agency.
- Stock dividends and income from the sale of stock unless the source can be identified.
- Income from a PERS retirement account.

(See Reference Pamphlet, page 12.)

#### To Complete Schedule C:

##### Part 1. Income Received/Business Position Disclosure

- Disclose the name and address of each source of income or each business entity with which you held a business position.
- Provide a general description of the business activity if the source is a business entity.
- Check the box indicating the amount of gross income received.
- Identify the consideration for which the income was received.
- For income from commission sales, check the box indicating the gross income received and list the name of each source of commission income of \$10,000 or more. (See Reference Pamphlet, page 8.) **Note: If you receive commission income on a regular basis or have an ownership interest of 10% or more, you must disclose the business entity and the income on Schedule A-2.**
- Disclose the job title or business position, if any, that you held with the business entity, even if you did not receive income during the reporting period.

##### Part 2. Loans Received or Outstanding During the Reporting Period

- Provide the name and address of the lender.
- Provide a general description of the business activity if the lender is a business entity.
- Check the box indicating the highest balance of the loan during the reporting period.
- Disclose the interest rate and the term of the loan.
  - For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period.
  - The term of the loan is the total number of months or years given for repayment of the loan at the time the loan was entered into.
- Identify the security, if any, for the loan.

## Instructions – Schedule D Income – Gifts

A gift is anything of value for which you have not provided equal or greater consideration to the donor. A gift is reportable if its fair market value is \$50 or more. In addition, multiple gifts totaling \$50 or more received during the reporting period from a single source must be reported.

It is the acceptance of a gift, not the ultimate use to which it is put, that imposes your reporting obligation. Except as noted below, you must report a gift even if you never used it or if you gave it away to another person.

If the exact amount of a gift is unknown, you must make a good faith estimate of the item's fair market value. Listing the value of a gift as "over \$50" or "value unknown" is not adequate disclosure. In addition, if you received a gift through an intermediary, you must disclose the name, address, and business activity of both the donor and the intermediary. You may indicate an intermediary either in the "source" field after the name or in the "comments" section at the bottom of Schedule D.

### Commonly reportable gifts include:

- Tickets/passes to sporting or entertainment events
- Tickets/passes to amusement parks
- Parking passes not used for official agency business
- Food, beverages, and accommodations, including those provided in direct connection with your attendance at a convention, conference, meeting, social event, meal, or like gathering
- Rebates/discounts not made in the regular course of business to members of the public without regard to official status
- Wedding gifts (See Reference Pamphlet, page 16)
- An honorarium received prior to assuming office (You may report an honorarium as income on Schedule C, rather than as a gift on Schedule D, if you provided services of equal or greater value than the payment received. See Reference Pamphlet, page 10.)
- Transportation and lodging (See Schedule E.)
- Forgiveness of a loan received by you

### Reminders

- Gifts from a single source are subject to a \$520 limit in 2021. (See Reference Pamphlet, page 10.)
- Code filers – you only need to report gifts from reportable sources.

### Gift Tracking Mobile Application

- FPPC has created a gift tracking app for mobile devices that helps filers track gifts and provides a quick and easy way to upload the information to the Form 700. Visit FPPC's website to download the app.

### You are not required to disclose:

- Gifts that were not used and that, within 30 days after receipt, were returned to the donor or delivered to a charitable organization or government agency without being claimed by you as a charitable contribution for tax purposes
- Gifts from your spouse or registered domestic partner, child, parent, grandparent, grandchild, brother, sister, and certain other family members (See Regulation 18942 for a complete list.). The exception does not apply if the donor was acting as an agent or intermediary for a reportable source who was the true donor.
- Gifts of similar value exchanged between you and an individual, other than a lobbyist registered to lobby your state agency, on holidays, birthdays, or similar occasions
- Gifts of informational material provided to assist you in the performance of your official duties (e.g., books, pamphlets, reports, calendars, periodicals, or educational seminars)
- A monetary bequest or inheritance (However, inherited investments or real property may be reportable on other schedules.)
- Personalized plaques or trophies with an individual value of less than \$250
- Campaign contributions
- Up to two tickets, for your own use, to attend a fundraiser for a campaign committee or candidate, or to a fundraiser for an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code. The ticket must be received from the organization or committee holding the fundraiser.
- Gifts given to members of your immediate family if the source has an established relationship with the family member and there is no evidence to suggest the donor had a purpose to influence you. (See Regulation 18943.)
- Free admission, food, and nominal items (such as a pen, pencil, mouse pad, note pad or similar item) available to all attendees, at the event at which the official makes a speech (as defined in Regulation 18950(b)(2)), so long as the admission is provided by the person who organizes the event.
- Any other payment not identified above, that would otherwise meet the definition of gift, where the payment is made by an individual who is not a lobbyist registered to lobby the official's state agency, where it is clear that the gift was made because of an existing personal or business relationship unrelated to the official's position and there is no evidence whatsoever at the time the gift is made to suggest the donor had a purpose to influence you.

### To Complete Schedule D:

- Disclose the full name (not an acronym), address, and, if a business entity, the business activity of the source.
- Provide the date (month, day, and year) of receipt, and disclose the fair market value and description of the gift.

# Instructions – Schedule E Travel Payments, Advances, and Reimbursements

Travel payments reportable on Schedule E include advances and reimbursements for travel and related expenses, including lodging and meals.

Gifts of travel may be subject to the gift limit. In addition, certain travel payments are reportable gifts, but are not subject to the gift limit. To avoid possible misinterpretation or the perception that you have received a gift in excess of the gift limit, you may wish to provide a specific description of the purpose of your travel. (See the FPPC fact sheet entitled "Limitations and Restrictions on Gifts, Honoraria, Travel, and Loans" to read about travel payments under section 89506(a).)

**You are not required to disclose:**

- Travel payments received from any state, local, or federal government agency for which you provided services equal or greater in value than the payments received, such as reimbursement for travel on agency business from your government agency employer.
- A payment for travel from another local, state, or federal government agency and related per diem expenses when the travel is for education, training or other inter-agency programs or purposes.
- Travel payments received from your employer in the normal course of your employment that are included in the income reported on Schedule C.
- A travel payment that was received from a nonprofit entity exempt from taxation under Internal Revenue Code Section 501(c)(3) for which you provided equal or greater consideration, such as reimbursement for travel on business for a 501(c)(3) organization for which you are a board member.

**Note: Certain travel payments may not be reportable if reported via email on Form 801 by your agency.**

**To Complete Schedule E:**

- Disclose the full name (not an acronym) and address of the source of the travel payment.
- Identify the business activity if the source is a business entity.
- Check the box to identify the payment as a gift or income, report the amount, and disclose the date(s).
  - **Travel payments are gifts** if you did not provide services that were equal to or greater in value than the payments received. You must disclose gifts totaling \$500 or more from a single source during the period covered by the statement.

When reporting travel payments that are gifts, you must provide a description of the gift, the **date(s)** received, and the **travel destination**.

- **Travel payments are income** if you provided services that were equal to or greater in value than the

payments received. You must disclose income totaling \$500 or more from a single source during the period covered by the statement. You have the burden of proving the payments are income rather than gifts. When reporting travel payments as income, you must describe the services you provided in exchange for the payment. You are not required to disclose the date(s) for travel payments that are income.

**Example:**

City council member MaryClaire Chandler is the chair of a 501(c)(6) trade association, and the association pays for her travel to attend its meetings. Because MaryClaire is deemed to be providing equal or greater consideration for the travel payment by virtue of serving on the board, this payment may be reported as income. Payments for MaryClaire to attend other events for which she is not providing services are likely considered gifts. Note that the same payment from a 501(c)(3) would NOT be reportable.

<small>▶ NAME OF SOURCE (Not an Acronym)</small>	
Health Services Trade Association	
<small>ADDRESS (Business Address Acceptable)</small>	
1230 K Street, Suite 610	
<small>CITY AND STATE</small>	
Sacramento, CA	
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE	
Association of Healthcare Workers	
<small>DATE(S):</small> ___/___/___ <small>(if gift)</small> <small>AMT: \$</small> 550.00	
<small>▶ MUST CHECK ONE:</small> <input type="checkbox"/> Gift <small>-or-</small> <input checked="" type="checkbox"/> Income	
<input type="radio"/> Made a Speech/Participated in a Panel	
<input checked="" type="radio"/> Other - Provide Description <u>Travel reimbursement for board meeting.</u>	
<small>▶ If Gift, Provide Travel Destination</small> _____	

**Example:**

Mayor Kim travels to China on a trip organized by China Silicon Valley Business Development, a California nonprofit, 501(c)(6) organization. The Chengdu Municipal People's Government pays for Mayor Kim's airfare and travel costs, as well as his meals and lodging during the trip. The trip's agenda shows that the trip's purpose is to promote job creation and economic activity in China and in Silicon Valley, so the trip is reasonably related to a governmental purpose. Thus, Mayor Kim must report the gift of travel, but the gift is exempt from the gift limit. In this case, the travel payments are not subject to the gift limit because the source is a foreign government and because the travel is reasonably related to a governmental purpose. (Section 89506(a)(2).) Note that Mayor Kim could be disqualified from participating in or making decisions about The Chengdu Municipal People's Government for 12 months. Also note that if China Silicon Valley Business Development (a 501(c)(6) organization) paid for the travel costs rather than the governmental organization, the payments would be subject to the gift limits. (See the FPPC fact sheet, Limitations and Restrictions on Gifts, Honoraria, Travel and Loans, at [www.fppc.ca.gov](http://www.fppc.ca.gov).)

<small>▶ NAME OF SOURCE (Not an Acronym)</small>	
Chengdu Municipal People's Government	
<small>ADDRESS (Business Address Acceptable)</small>	
2 Caoshi St. CaoShiJie, Qingyang Qu, Chengdu Shi,	
<small>CITY AND STATE</small>	
Sichuan Sheng, China, 610000	
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE	
<small>DATE(S):</small> 09 / 04 / XX - 09 / 08 / XX <small>(if gift)</small> <small>AMT: \$</small> 3,874.38	
<small>▶ MUST CHECK ONE:</small> <input checked="" type="checkbox"/> Gift <small>-or-</small> <input type="checkbox"/> Income	
<input type="radio"/> Made a Speech/Participated in a Panel	
<input checked="" type="radio"/> Other - Provide Description <u>Travel reimbursement for trip to China.</u>	
<small>▶ If Gift, Provide Travel Destination</small> <u>Sichuan Sheng, China</u>	

## Restrictions and Prohibitions

The Political Reform Act (Gov. Code Sections 81000-91014) requires most state and local government officials and employees to publicly disclose their economic interests including personal assets and income. The Act's conflict of interest provisions also disqualify a public official from taking part in a governmental decision if it is reasonably foreseeable that the decision will have a material financial effect on these economic interests as well as the official's personal finances and those of immediate family. (Gov. Code Sections 87100 and 87103.) The Fair Political Practices Commission (FPPC) is the state agency responsible for issuing the attached Statement of Economic Interests, Form 700, and for interpreting the Act's provisions.

### Gift Prohibition

Gifts received by most state and local officials, employees, and candidates are subject to a limit. In 2021-2022, the gift limit increased to \$520 from a single source during a calendar year. In 2019 and 2020, the gift limit was \$500 from a single source during a calendar year.

Additionally, state officials, state candidates, and certain state employees are subject to a \$10 limit per calendar month on gifts from lobbyists and lobbying firms registered with the Secretary of State. See Reference Pamphlet, page 10.

State and local officials and employees should check with their agency to determine if other restrictions apply.

### Disqualification

Public officials are, under certain circumstances, required to disqualify themselves from making, participating in, or attempting to influence governmental decisions that will affect their economic interests. This may include interests they are not required to disclose. For example, a personal residence is often not reportable, but may be grounds for disqualification. Specific disqualification requirements apply to 87200 filers (e.g., city councilmembers, members of boards of supervisors, planning commissioners, etc.). These officials must publicly identify the economic interest that creates a conflict of interest and leave the room before a discussion or vote takes place at a public meeting. For more information, consult Government Code Section 87105, Regulation 18707, and the Guide to Recognizing Conflicts of Interest page at [www.fppc.ca.gov](http://www.fppc.ca.gov).

### Honorarium Ban

Most state and local officials, employees, and candidates are prohibited from accepting an honorarium for any speech given, article published, or attendance at a conference, convention, meeting, or like gathering. (See Reference Pamphlet, page 10.)

### Loan Restrictions

Certain state and local officials are subject to restrictions on loans. (See Reference Pamphlet, page 14.)

### Post-Governmental Employment

There are restrictions on representing clients or employers before former agencies. The provisions apply to elected state officials, most state employees, local elected officials, county chief administrative officers, city managers, including the chief administrator of a city, and general managers or chief administrators of local special districts and JPAs. The FPPC website has fact sheets explaining the provisions.

### Late Filing

The filing officer who retains originally-signed or electronically filed statements of economic interests may impose on an individual a fine for any statement that is filed late. The fine is \$10 per day up to a maximum of \$100. Late filing penalties may be reduced or waived under certain circumstances.

Persons who fail to timely file their Form 700 may be referred to the FPPC's Enforcement Division (and, in some cases, to the Attorney General or district attorney) for investigation and possible prosecution. In addition to the late filing penalties, a fine of up to \$5,000 per violation may be imposed.

**For assistance** concerning reporting, prohibitions, and restrictions under the Act:

- Email questions to [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov).
- Call the FPPC toll-free at (866) 275-3772.

### Form 700 is a Public Document Public Access Must Be Provided

Statements of Economic Interests are public documents. The filing officer must permit any member of the public to inspect and receive a copy of any statement.

- Statements must be available as soon as possible during the agency's regular business hours, but in any event not later than the second business day after the statement is received. Access to the Form 700 is not subject to the Public Records Act procedures.
- No conditions may be placed on persons seeking access to the forms.
- No information or identification may be required from persons seeking access.
- Reproduction fees of no more than 10 cents per page may be charged.

## Questions and Answers

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### General

- Q. What is the reporting period for disclosing interests on an assuming office statement or a candidate statement?
- A. On an assuming office statement, disclose all reportable investments, interests in real property, and business positions held on the date you assumed office. In addition, you must disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you assumed office.

On a candidate statement, disclose all reportable investments, interests in real property, and business positions held on the date you file your declaration of candidacy. You must also disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you file your declaration of candidacy.

- Q. I hold two other board positions in addition to my position with the county. Must I file three statements of economic interests?
- A. Yes, three are required. However, you may instead complete an expanded statement listing the county and the two boards on the Cover Page or an attachment as the agencies for which you will be filing. Disclose all reportable economic interests in all three jurisdictions on the expanded statement. File the expanded statement for your primary position providing an original “wet” signature unless filed with a secure electronic signature. (See page 3 above.) File copies of the expanded statement with the other two agencies as required by Regulation 18723.1(c). Remember to complete separate statements for positions that you leave or assume during the year.
- Q. I am a department head who recently began acting as city manager. Should I file as the city manager?
- A. Yes. File an assuming office statement as city manager. Persons serving as “acting,” “interim,” or “alternate” must file as if they hold the position because they are or may be performing the duties of the position.

- Q. My spouse and I are currently separated and in the process of obtaining a divorce. Must I still report my spouse’s income, investments, and interests in real property?
- A. Yes. A public official must continue to report a spouse’s economic interests until such time as dissolution of marriage proceedings is final. However, if a separate property agreement has been reached prior to that time, your estranged spouse’s income may not have to be reported. Contact the FPPC for more information.
- Q. As a designated employee, I left one state agency to work for another state agency. Must I file a leaving office statement?
- A. Yes. You may also need to file an assuming office statement for the new agency.

### Investment Disclosure

- Q. I have an investment interest in shares of stock in a company that does not have an office in my jurisdiction. Must I still disclose my investment interest in this company?
- A. Probably. The definition of “doing business in the jurisdiction” is not limited to whether the business has an office or physical location in your jurisdiction. (See Reference Pamphlet, page 13.)
- Q. My spouse and I have a living trust. The trust holds rental property in my jurisdiction, our primary residence, and investments in diversified mutual funds. I have full disclosure. How is this trust disclosed?
- A. Disclose the name of the trust, the rental property and its income on Schedule A-2. Your primary residence and investments in diversified mutual funds registered with the SEC are not reportable.
- Q. I am required to report all investments. I have an IRA that contains stocks through an account managed by a brokerage firm. Must I disclose these stocks even though they are held in an IRA and I did not decide which stocks to purchase?
- A. Yes. Disclose on Schedule A-1 or A-2 any stock worth \$2,000 or more in a business entity located in or doing business in your jurisdiction.

## Questions and Answers Continued

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- Q. The value of my stock changed during the reporting period. How do I report the value of the stock?
- A. You are required to report the highest value that the stock reached during the reporting period. You may use your monthly statements to determine the highest value. You may also use the entity's website to determine the highest value. You are encouraged to keep a record of where you found the reported value. Note that for an assuming office statement, you must report the value of the stock on the date you assumed office.
- Q. I am the sole owner of my business, an S-Corporation. I believe that the nature of the business is such that it cannot be said to have any "fair market value" because it has no assets. I operate the corporation under an agreement with a large insurance company. My contract does not have resale value because of its nature as a personal services contract. Must I report the fair market value for my business on Schedule A-2 of the Form 700?
- A. Yes. Even if there are no *tangible* assets, intangible assets, such as relationships with companies and clients are commonly sold to qualified professionals. The "fair market value" is often quantified for other purposes, such as marital dissolutions or estate planning. In addition, the IRS presumes that "personal services corporations" have a fair market value. A professional "book of business" and the associated goodwill that generates income are not without a determinable value. The Form 700 does not require a precise fair market value; it is only necessary to check a box indicating the broad range within which the value falls.
- Q. I own stock in IBM and must report this investment on Schedule A-1. I initially purchased this stock in the early 1990s; however, I am constantly buying and selling shares. Must I note these dates in the "Acquired" and "Disposed" fields?
- A. No. You must only report dates in the "Acquired" or "Disposed" fields when, during the reporting period, you initially purchase a reportable investment worth \$2,000 or more or when you dispose of the entire investment. You are not required to track the partial trading of an investment.
- Q. On last year's filing I reported stock in Encoe valued at \$2,000 - \$10,000. Late last year the value of this stock fell below and remains at less than \$2,000. How should this be reported on this year's statement?
- A. You are not required to report an investment if the value was less than \$2,000 during the **entire** reporting period. However, because a disposed date is not required for stocks that fall below \$2,000, you may want to report the stock and note in the "comments" section that the value fell below \$2,000. This would be for informational purposes only; it is not a requirement.
- Q. We have a Section 529 account set up to save money for our son's college education. Is this reportable?
- A. If the Section 529 account contains reportable interests (e.g., common stock valued at \$2,000 or more), those interests are reportable (not the actual Section 529 account). If the account contains solely mutual funds, then nothing is reported.

### Income Disclosure

- Q. I reported a business entity on Schedule A-2. Clients of my business are located in several states. Must I report all clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2, Part 3?
- A. No, only the clients located in or doing business on a regular basis in your jurisdiction must be disclosed.
- Q. I believe I am not required to disclose the names of clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2 because of their right to privacy. Is there an exception for reporting clients' names?
- A. Regulation 18740 provides a procedure for requesting an exemption to allow a client's name not to be disclosed if disclosure of the name would violate a legally recognized privilege under California or Federal law. This regulation may be obtained from our website at [www.fppc.ca.gov](http://www.fppc.ca.gov). (See Reference Pamphlet, page 14.)

## Questions and Answers Continued

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Q. I am sole owner of a private law practice that is not reportable based on my limited disclosure category. However, some of the sources of income to my law practice are from reportable sources. Do I have to disclose this income?

A. Yes, even though the law practice is not reportable, reportable sources of income to the law practice of \$10,000 or more must be disclosed. This information would be disclosed on Schedule C with a note in the "comments" section indicating that the business entity is not a reportable investment. The note would be for informational purposes only; it is not a requirement.

Q. I am the sole owner of my business. Where do I disclose my income - on Schedule A-2 or Schedule C?

A. Sources of income to a business in which you have an ownership interest of 10% or greater are disclosed on Schedule A-2. (See Reference Pamphlet, page 8.)

Q. My husband is a partner in a four-person firm where all of his business is based on his own billings and collections from various clients. How do I report my community property interest in this business and the income generated in this manner?

A. If your husband's investment in the firm is 10% or greater, disclose 100% of his share of the business on Schedule A-2, Part 1 and 50% of his income on Schedule A-2, Parts 2 and 3. For example, a client of your husband's must be a source of at least \$20,000 during the reporting period before the client's name is reported.

Q. How do I disclose my spouse's or registered domestic partner's salary?

A. Report the name of the employer as a source of income on Schedule C.

Q. I am a doctor. For purposes of reporting \$10,000 sources of income on Schedule A-2, Part 3, are the patients or their insurance carriers considered sources of income?

A. If your patients exercise sufficient control by selecting you instead of other doctors, then your patients, rather than their insurance carriers, are sources of income to you. (See Reference Pamphlet, page 14.)

Q. I received a loan from my grandfather to purchase my home. Is this loan reportable?

A. No. Loans received from family members are not reportable.

Q. Many years ago, I loaned my parents several thousand dollars, which they paid back this year. Do I need to report this loan repayment on my Form 700?

A. No. Payments received on a loan made to a family member are not reportable.

### Real Property Disclosure

Q. During this reporting period we switched our principal place of residence into a rental. I have full disclosure and the property is located in my agency's jurisdiction, so it is now reportable. Because I have not reported this property before, do I need to show an "acquired" date?

A. No, you are not required to show an "acquired" date because you previously owned the property. However, you may want to note in the "comments" section that the property was not previously reported because it was used exclusively as your residence. This would be for informational purposes only; it is not a requirement.

Q. I am a city manager, and I own a rental property located in an adjacent city, but one mile from the city limit. Do I need to report this property interest?

A. Yes. You are required to report this property because it is located within 2 miles of the boundaries of the city you manage.

Q. Must I report a home that I own as a personal residence for my daughter?

A. You are not required to disclose a home used as a personal residence for a family member unless you receive income from it, such as rental income.

Q. I am a co-signer on a loan for a rental property owned by a friend. Since I am listed on the deed of trust, do I need to report my friend's property as an interest in real property on my Form 700?

A. No. Simply being a co-signer on a loan for property does not create a reportable interest in that real property.

## Questions and Answers Continued

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### Gift Disclosure

- Q. If I received a reportable gift of two tickets to a concert valued at \$100 each, but gave the tickets to a friend because I could not attend the concert, do I have any reporting obligations?
- A. Yes. Since you accepted the gift and exercised discretion and control of the use of the tickets, you must disclose the gift on Schedule D.
- Q. Julia and Jared Benson, a married couple, want to give a piece of artwork to a county supervisor. Is each spouse considered a separate source for purposes of the gift limit and disclosure?
- A. Yes, each spouse may make a gift valued at the gift limit during a calendar year. For example, during 2021 the gift limit was \$520, so the Bensons may have given the supervisor artwork valued at no more than \$1,040. The supervisor must identify Jared and Julia Benson as the sources of the gift.
- Q. I am a Form 700 filer with full disclosure. Our agency holds a holiday raffle to raise funds for a local charity. I bought \$10 worth of raffle tickets and won a gift basket valued at \$120. The gift basket was donated by Doug Brewer, a citizen in our city. At the same event, I bought raffle tickets for, and won a quilt valued at \$70. The quilt was donated by a coworker. Are these reportable gifts?
- A. Because the gift basket was donated by an outside source (not an agency employee), you have received a reportable gift valued at \$110 (the value of the basket less the consideration paid). The source of the gift is Doug Brewer and the agency is disclosed as the intermediary. Because the quilt was donated by an employee of your agency, it is not a reportable gift.
- Q. My agency is responsible for disbursing grants. An applicant (501(c)(3) organization) met with agency employees to present its application. At this meeting, the applicant provided food and beverages. Would the food and beverages be considered gifts to the employees? These employees are designated in our agency's conflict of interest code and the applicant is a reportable source of income under the code.
- A. Yes. If the value of the food and beverages consumed by any one filer, plus any other gifts received from the same source during the reporting period total \$50 or more, the food and beverages would be reported using the fair market value and would be subject to the gift limit.
- Q. I received free admission to an educational conference related to my official duties. Part of the conference fees included a round of golf. Is the value of the golf considered informational material?
- A. No. The value of personal benefits, such as golf, attendance at a concert, or sporting event, are gifts subject to reporting and limits.

# City of Oakland Bicyclist and Pedestrian Advisory Commission

## Strategic Plan Goals for 2021

February 2021

For the BPAC Strategic Plan 2021, the work of the BPAC was divided into four general goals, each with a corresponding set of tasks.

### Goal 1: Be strong advocates for bicycle and pedestrian safety.

Task	Task Description	Committee Assigned	Commissioner Assigned	Progress	Issues/Barriers/Notes
<b>Specific Tasks</b>					
1.1	Finalize safety prioritization legislation for Council	Legislative			
1.2	Draft proposed legislation on school zone speed limit authority	Legislative			
1.3	Support the relaunch and rebrand OakDOT's Vision Zero focused on design and equity. Invite staff working on the initiative to present at BPAC on community and staff concerns.				
<b>Ongoing Tasks</b>					
1.a	Create standing item on BPAC agenda to get updates on bicycle and pedestrian safety from the last month (specifically accidents and fatalities involving cyclists and pedestrians).				
1.b	Advocate for permanent Slow Streets and Essential Places improvements.				
1.c	Provide input to the Reimagining Public Safety Task Force.				

### Goal 2: Be a conduit for information on bicycle and pedestrian projects.

Task	Task Description	Committee Assigned	Commissioner Assigned	Progress	Issues/Barriers/Notes
<b>Specific Tasks</b>					
2.1	Invite OakDOT to present on Performance Measures methodology associated with Complete Streets work, including the summary of the performance measures items outlined in the the 2013 Complete Streets Resolution, as well as a summary of the Equity Score criteria from OakDOT's Strategic Plan.				<p>Items from the Complete Streets Resolution in 2013:</p> <ol style="list-style-type: none"> <li>1) <i>Establishing specific performance measures pertaining to Complete Streets</i></li> <li>2) <i>Collecting and updating data to evaluate measure on a regular basis</i></li> <li>3) <i>Making the results of Complete Street performance analyses available publicly as completed.</i></li> </ol>

2.2	Invite project managers to present on projects post-construction evaluation. Select two projects to have a presentation on before June (potentially 90th Avenue and/or Foothill Avenue rapid response fix).				How is OakDOT evaluating? How has this impacted speeds? How has this impacted traffic volume? How has this impacted bike/ped users comfort level?
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**Ongoing Tasks**

2.a	Get status update on Bike Plan and Pedestrian Plan every three months.				
2.b	Highlight the Infrastructure Committee's review of projects during main BPAC meetings and promote their meeting summaries.				
2.c	Get periodic updates on Major Development Project from Department of Planning and highlight the most bike/ped relevant projects for Infrastructure Committee to review and provide comments.			Department of Planning to present at February meeting	

**Goal 3: Encourage equity driven investments and policies and advocate for the bicycle and pedestrian community.**

Task	Task Description	Committee Assigned	Commissioner Assigned	Progress	Issues/Barriers/Notes
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**Specific Tasks**

3.1	Work with OakDOT, Sustainability Department, and Department of Planning to align bicycle and pedestrian equity goals and guidelines into the updated City General Plan (transportation network maps, and identifying equity gaps for funding) and Environmental Justice Element (transit and access to public facilities mandated sections). This involvement with BPAC will also help align the Bike Plan, the ECAP, and the General Plan policies and plans in regards to Bicycle and Pedestrian infrastructure.				
3.1	Parking - work on developing policy recommendation on parking is not a priority on Oakland streets.				

**Ongoing Tasks**

3.a	Continue to use BPAC blog as a community engagement tool.				
3.b	Prioritize safety needs in East Oakland.				
3.c	Attract grants for pilot Bicycle and Pedestrian equity infrastructure projects in Oakland				
3.d	Advocate for community groups to be integrated into OakDOT program and				Ask that Bike Plan update presentations

	community outreach work (in a paid capacity wherever possible).				provide summary of program initiatives.
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**Goal 4: Build relationships with policymakers and provide feedback on pedestrian and bicycle policy.**

Task	Task Description	Committee Assigned	Commissioner Assigned	Progress	Issues/Barriers/Notes
<b>Specific Tasks</b>					
4.1	Prepare and present an "Introduction to BPAC" including a review of Strategic Goals to Public Works Committee				This is in the works. Andy, Patricia, and George will meet with Noel Gallo to present the chair's report.
4.2	Establish ongoing inter-agency bicycle and pedestrian infrastructure working advisory group with Caltrans (given their new focused Bicycle and Pedestrian investments and plans).				
4.3	Establish a regular regional policy meeting on Bicycle and Pedestrian infrastructure plans with MTC and the Bay Area Regional Collaborative				This will enable us to advocate and stay abreast of developments with Plan Bay Area 2050, upcoming National Infrastructure funding, transportation bills; and Statewide urban greening grants and so forth.
<b>Ongoing Tasks</b>					
4.a	Provide updates on specific BPAC efforts with Councilmembers.				