



**CITY OF OAKLAND  
BLUE RIBBON EQUITABLE BUSINESS TAX TASKFORCE**

**REGULAR MEETING  
Meeting Agenda  
Thursday, June 10, 2021  
6:00 PM  
Via Teleconference**

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Blue Ribbon Equitable Business Tax Taskforce Members:

Michael Katz  
Taison Kwamilele  
Cynthia Larsen – **Vice Chairperson**  
Jessica Moncada Kone  
Zain Oke  
Liz Ortega  
Daniel Swafford  
Ari Takata-Vasquez - **Chairperson**  
Minh Tsai  
Ben Wanzo  
Winter Williams

Task Force website: [City of Oakland | Blue Ribbon Equitable Business Tax Task Force](#)

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**Pursuant to the Governor's Executive Order N-29-20, Blue Ribbon Equitable Business Tax Taskforce Members, as well as City staff, will participate via phone/video conference, and no physical teleconference locations are required.**

**PUBLIC PARTICIPATION**

The Oakland Blue Ribbon Equitable Business Tax Taskforce encourages public participation in the online board meetings. The public may observe and/or participate in this meeting in several ways.

**OBSERVE:**

- To observe the meeting by video conference, please click on this link:  
<https://us02web.zoom.us/j/83616493506?pwd=djZxTTRxc3FKSHR4aDUzYnJHQzQvZz09>  
Passcode: 384984 at noticed time.

Instructions on how to join a meeting by video conference are available at:  
<https://support.zoom.us/hc/en-us/articles/201362193>, which is a webpage entitled “Joining a Meeting”

- To listen to the meeting by phone, please call the numbers below at the noticed meeting time:  
Dial (for higher quality, dial a number based on your current location):

One tap mobile :

[US: +16699006833,,83616493506#,,,,\\*384984#](tel:+16699006833,,83616493506#,,,,*384984#) or  
[+12532158782,,83616493506#,,,,\\*384984#](tel:+12532158782,,83616493506#,,,,*384984#)

**Or Telephone:**

US: +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 +1 929 205 6099

Webinar ID: 836 1649 3506

Passcode: 384984

International numbers available: <https://us02web.zoom.us/j/kxadPAqUZ>

After calling any of these phone numbers, if you are asked for a participant ID or code, press #. Instructions on how to join a meeting by phone are available at: <https://support.zoom.us/hc/en-us/articles/201362663>, which is a webpage entitled “Joining a Meeting By Phone.”

**PROVIDE PUBLIC COMMENT:** There are three ways to make public comment within the time allotted for public comment on an eligible Agenda item.

- **Comment in advance:** To send your comment directly to the Blue Ribbon Equitable Business Tax Taskforce and staff BEFORE the meeting starts, please send your comment, along with your full name and agenda item number you are commenting on, to [BlueRibbonTaskForce@oaklandca.gov](mailto:BlueRibbonTaskForce@oaklandca.gov). Please note that eComment submissions close one (1) hour before posted meeting time. All submitted public comment will be provided to the Task Force Members prior to the meeting.
- **By Video Conference:** 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 at the beginning of the meeting. You will then be unmuted, during your turn, and allowed to participate in public comment. After the allotted time, you will then be re-muted. Instructions on how to “Raise Your Hand” are available at: <https://support.zoom.us/hc/en-us/articles/205566129>, which is a webpage entitled “Raise Hand In Webinar.”
- **By Phone:** To comment by phone, please call on one of the above listed phone numbers. You will be prompted to “Raise Your Hand” by pressing STAR-NINE (“\*9”) to request to speak when Public Comment is being taken on a eligible agenda item at the beginning of the meeting. Once it is your turn, you will be unmuted and allowed to make your comment. After the allotted time, you will be re-muted. Instructions of how to raise your hand by phone are available at: <https://support.zoom.us/hc/en-us/articles/201362663>, which is a webpage entitled “Joining a Meeting by Phone.”

If you have any questions about these protocols, please e-mail [BlueRibbonTaskForce@oaklandca.gov](mailto:BlueRibbonTaskForce@oaklandca.gov)

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Do you need an ASL, Cantonese, Mandarin or Spanish interpreter or other assistance to participate? Please email [SAzimi@oaklandca.gov](mailto:SAzimi@oaklandca.gov) or call (510) 238-2972 for TDD/TTY five days in advance.

¿Necesita un intérprete en español, cantonés o mandarín, u otra ayuda para participar? Por favor envíe un correo electrónico a [SAzimi@oaklandca.gov](mailto:SAzimi@oaklandca.gov) o llame al (510) 238-2972 para TDD/TTY por lo menos cinco días antes de la reunión. Gracias.

您需要手語,西班牙語,粵語或國語翻譯服務嗎? 請在會議前五個工作日電郵 [SAzimi@oaklandca.gov](mailto:SAzimi@oaklandca.gov) 或 致電 (510) 238-2972 TDD/TTY.

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- 1. Roll Call and Determination of Quorum**
  - 2. Public Comment:** Speakers will be called on by the facilitator as speakers “raise their hand” through video conference or by telephone to speak on Agenda items. Comments for matters not on the Agenda will be taken during Open Forum. All speakers will be allotted a maximum of two minutes to address the Task Force, unless amended by the Chair.
  - 3. Approval of Draft Minutes from the April 29, 2021 Meeting**
  - 4. Staff Updates:**
    - A. Requested Speakers
    - B. Summary of Business Tax Data (as presented in prior meetings): Click [here](#) for Summary
    - C. Tax Modeling
  - 5. Ad Hoc Committees Updates:** Task Force will discuss the progress of Ad Hoc Committees.
    - A. Committee A, Job Quality & Employment
    - B. Committee B, , Business Mobility, Real Estate, Attraction & Retention
    - C. Committee C, Tax Categories & Implementation
  - 6. Action Items:**
    - A. **Task Force Tax Structure Discussion**
    - B. **Assignment of specific task(s) to committees**
    - C. **Master Calendar:** Review and update
  - 7. Agenda Requests for Future Meetings**

Task Force Members may use this opportunity to address new issues for Task Force business. New items will be referred to an Ad Hoc Committee for action, outreach, research and/or deliberation or scheduled to a subsequent Task Force meeting.
  - 8. Open Forum**
  - 9. Adjournment**

The meeting will adjourn upon the completion of the Task Force’s business.
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## **BLUE RIBBON EQUITABLE TASK FORCE ACTION MINUTES - THURSDAY, APRIL 29, 2021**

Meeting was called to order at 6:05 pm by Margaret O'Brien.

1. **Roll Call:** Katz, Kwamilele, Larsen, Oke, Ortega, Swafford, Takata-Vasquez were present. Moncada-Konte arrived at 6:10. Wanzo arrived at 6:15. Tsai, and Williams were absent. There was a quorum.

Board Members provided a brief synopsis of their background.

Margaret O'Brien, City Revenue and Tax Administrator, introduced herself and other Oakland staff members: Huey Dang, Principal Revenue Analyst, Chuck Maurer, Principal Revenue Analyst; Jennifer Logue, Deputy City Attorney, Micah Hinkle, Deputy Director Economic & Workforce Development; and Mitesh Bhakta, Deputy City Attorney. She also introduced outside consultants, Matt Newman and Shawn Blosser who work at Blue Sky Consulting Group.

2. **Public Comment** – No speakers.

3. **Informational Items**

- A. **Informational presentation of City Council proposed Equitable Business Tax resolution 88227 CMS and fiscal impact**
  - i. **Resolution 88337 CMS**
  - ii. **Finance Department's report staff**

Assistant Revenue & Tax Administrator Rogers Agaba provided a presentation and noted the figures were from before the COVID pandemic.

- B. **Continuation (from 4/22/2021 Special Taskforce meeting) Designing a Progressive Business Tax presentation**

Matt Newman and Shawn Blosser from Blue Sky Consulting Group reviewed business taxes by sector, business tax rates for other local cities, review possible goals for business tax reform, what raising taxes may involve, and next steps.

4. **Action Items:**

- A. **(Continued from the 4/22/2021 Special Taskforce meeting) Ad Hoc Committee Assignments**

Discussion held pertaining to how the sub committees could be created.

Discussion held regarding the three possible committees: Job quality and employment – committee a, Business mobility, real estate, attraction and retention – committee b, and Update buckets (categories)/implementation of “tax holidays” – committee c

Committee A Members were: Katz, Konte, Kwamilele and Oke

Committee B Members were: Takata-Vasquez, Wanzo, Williams and Katz.

Committee C Members were: Larsen and Swafford.

*Chair Takata-Vasquez moved, seconded by Board Member Oke to create the three ad hoc committees with the members stated.*

*Board polled as follows: Katz, Moncada-Konte, Kwamilele, Larsen, Oke, Swafford, Takata-Vasquez, Williams, Wanzo voted “aye.” All ayes – motion carried.*

- 5. Open Discussion – Task Force will discuss their business tax priorities and potentially delegate research items to staff and ad hoc committees for research and analysis.**

- 6. Agenda Requests for Future Meetings**

Chair and Vice Chair noted they would create the next agenda.

- 7. Open Forum**

No Comment.

- 8. Adjournment**

Margaret adjourned the meeting at 8:05 p.m. Next meeting will be May 13, 2021 at 6:00 pm.