

Navigating Oakland's Transfer Tax Rebate Program

Below is an explanation of how Oakland's Transfer Tax Program works and how we can help you get your tax money back.

1) To qualify for the Rebate Program you must use "Standard Plan A" or a design developed by an architect or engineer. To qualify for Standard Plan A, homes cannot be built on hills that slope more than one foot down in three feet horizontal, or have clay or concrete roof tiles with mortared edges. Single story houses must be less than 2,000 square feet and two story houses less than 3,000 square feet. Standard Plan A can also be used on duplexes.

You must enroll in the program WITHIN THE FIRST 60 DAYS of taking ownership. It is very important not to miss this deadline. You must enroll at the Oakland Building Department, go to the Intake Counter, take a copy of your deed and exterior photos of each of the four sides of your house. One of the photos must show the pitch of the roof. You must also bring something that shows the purchase price, such as the Settlement Statement in your escrow papers. Expect to spend one or two hours at the Building Dept. (Mondays and Wednesdays are very busy so avoid those days if possible.) You must also pay a \$250 application fee to the cashier. Part of the \$250 is refunded if you decide not to do the retrofit work. If the pictures show that the house will not comply with Standard Plan A, such as if you have a room above a garage, you may be told right then you will need to provide an engineered plan and you can skip the pre-inspection step 2. Diana Rex (510) 238-2033 is the head cashier and knows more than anyone about the paperwork part of the program. We suggest you call her before applying to make sure you have everything you need.

All you will receive at this time is an application number, which will also be your future permit number. The permit will not be issued until the city makes a "pre-inspection" of your home and you (or a contractor) submits retrofit plans to the City. You have 180 days from the date of filing your application to procure the permit.

2) In 2-3 days call the Building Department at 238-3891, give them your permit number, and tell them you would like a retrofit pre-inspection. They are open Monday, Tuesday, Thursday, and Friday from 8 a.m. to 4 p.m., and Wednesday from 9:30 a.m. to 4:00 p.m. On the last Wednesday of each month, they open at 10 a.m.

3) An inspector will come out to your home to determine what needs to be done in order to qualify for the program. He may say that you need plans designed by an engineer or tell you that you can use Standard Plan A. If he says you need an engineer because Standard Plan A will not work, ask him why Standard Plan A will not work. Also ask him to tell you if there are any parts of the house where Standard Plan A will work. Ask the inspector to explain all of this and put it IN WRITING.

Often engineering, or partial engineering, is the only option because most houses do not qualify under Standard Plan A. In addition, engineered retrofits are often less expensive and more effective than retrofits based on Standard Plan A.

After the pre-inspection, call us and we will come out free of charge and give you a proposal. At that time give us the information the inspector gave you, we will need it to create your proposal and develop plans that meet the City's requirements. Most retrofits cost between \$7,000 and \$10,000 or more, so before starting the process, make sure this is in your budget.

4) If you decide to use an engineer, look for a structural engineer with extensive experience in wood frame design and construction. Structural engineers have S.E. at the end of their names and have more advanced training than civil engineers. Any civil or structural engineer is allowed by state law to design your wood frame retrofit, even if they have designed only skyscrapers and have little knowledge or experience in wood frame retrofit work. This is similar to how a dermatologist can legally do your brain surgery. Therefore, you need to check the engineer's qualifications very carefully.

The engineer we use and trust is Thor Matteson, S.E., a nationally recognized structural engineer who specializes in making homes earthquake resistant. He is a consultant to the City of Oakland as they try to improve their program. He wrote "Wood-Framed Shear Wall Construction --an Illustrated Guide", published by the International Code Council. You can see his book and contact him through his website at www.shearwalls.com. In addition, he has been a builder for most of his life and therefore understands the practicality of retrofit work. If you want to understand the design principles behind all retrofit work, we suggest you read his book.

5) Once your plans are developed, either engineered or Standard Plan A, we will submit them to the Building Department for a permit. You have one year from the date of obtaining the permit to complete the work, NO EXCEPTIONS. No additional fees will be required by the city.

6) The rebate is equal to one half of one percent of the purchase price of your home, up to \$5,000.00. The final phase to receive your rebate is to go in person to the cashier at the Building Department, submit the finalized inspection card, a completed rebate form, your official deed that has a seal of certification on it, and an invoice from us. You will then walk out with your rebate check. YOU MUST DO THIS WITHIN 30 DAYS OF COMPLETION OF WORK.

This form can be downloaded as an attachment off the Bayarearetrofit.com message board PDF Download Forum. The form is also on Oakland's web site.

Questions? Email bayarearetrofit@aol.com