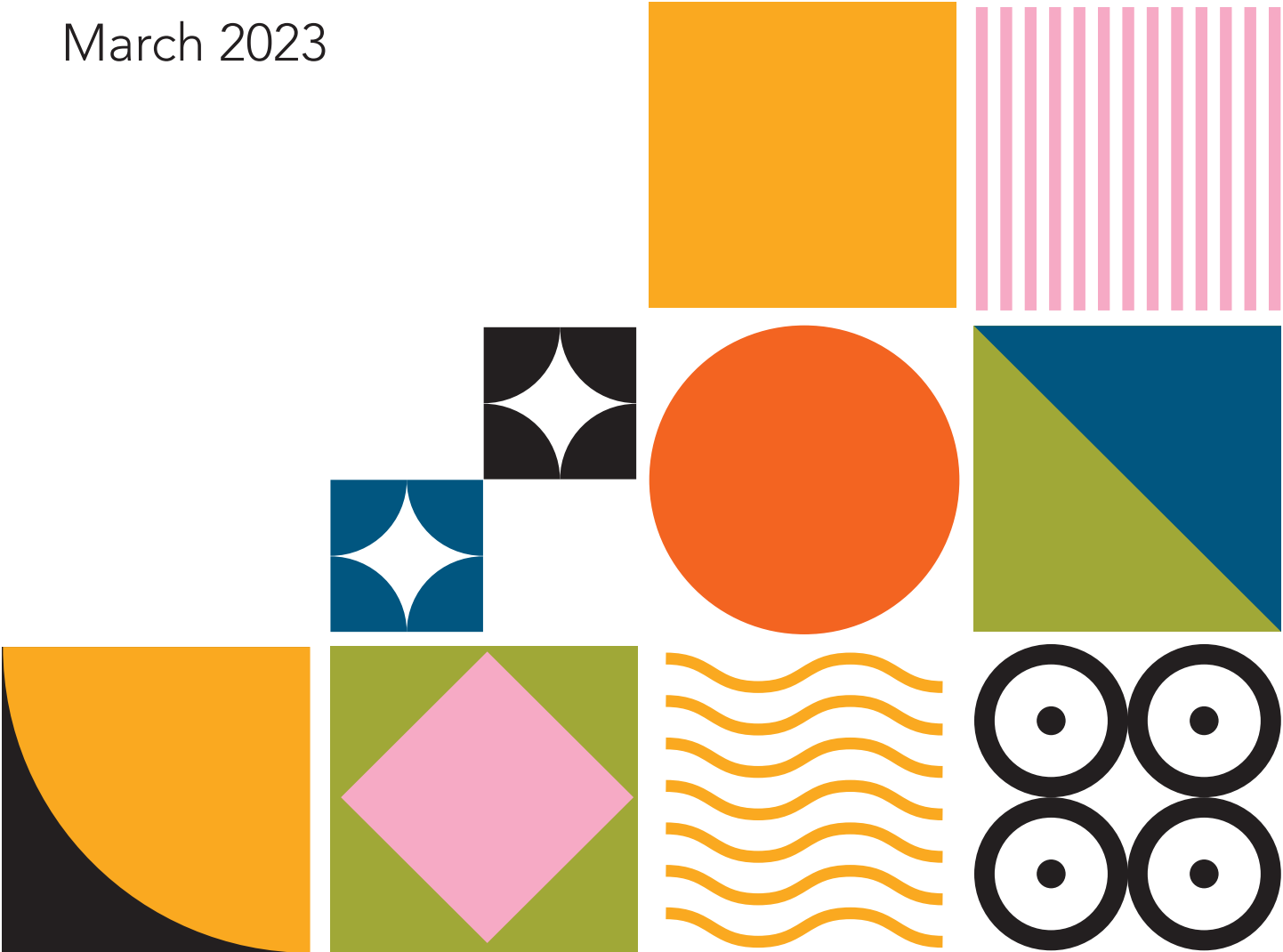


The 2022 City & County San Francisco Property & Business Improvement District (PBID) Program Impact Analysis

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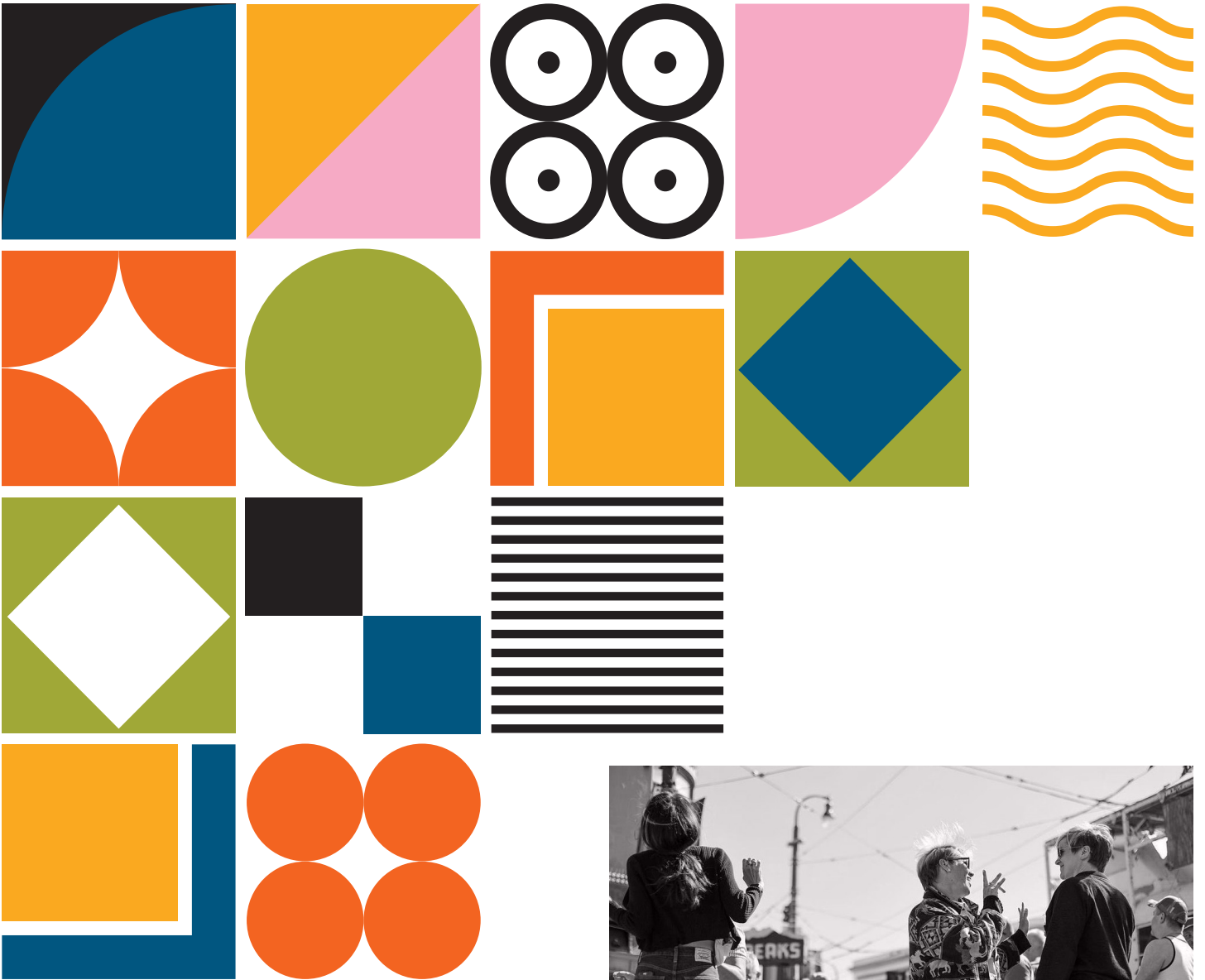


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 BID online platforms



Image sourced from Lower Polk
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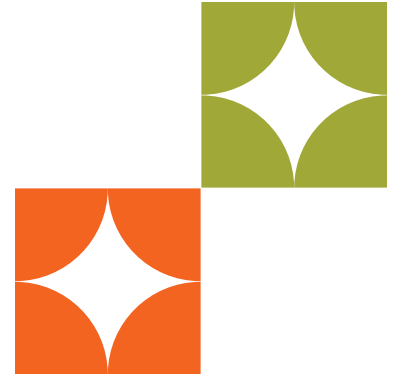
Image sourced from Tenderloin
 CBD/BID online platforms

Table of Contents

Authors of the Report	pg. 4
Foreword	pg. 5
Executive Summary	pg. 6
Overview of CBD/BIDs and National Context	pg. 9
o What are Community Benefit Districts?	pg. 10
o How do CBD/BIDs Serve San Francisco?	pg. 13
o The National Context of CBD/BIDs	pg. 17
San Francisco CBD/BID Profiles	pg. 22
CBD/BIDs Performance Analysis	pg. 38
o Cleaning and Safety	pg. 43
o Economic Development	pg. 51
o Placemaking and Public Art	pg. 56
o Community Engagement and Advocacy	pg. 59
o Social and Human Impact	pg. 63
o Operational and Financial Performance	pg. 67
Conclusion and Next Steps	pg. 71
Acknowledgements	pg. 74
Appendix	pg. 75
Sources	pg. 98



About the Authors



This report has been prepared for the San Francisco Office of Economic and Workforce Development by Urban Place Consulting Group Inc. with support from the International Downtown Association.

San Francisco Office of Economic and Workforce Development

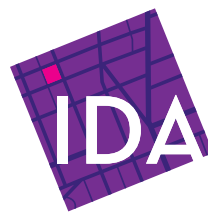
The San Francisco Office of Economic and Workforce Development strives to create a thriving and resilient economy, where barriers to economic and workforce opportunities are removed, and prosperity is shared equitably by all.

Urban Place Consulting Group, Inc.

Urban Place Consulting Group, Inc. (Urban Place Consulting) facilitates community initiatives in cities and towns across North America. We work in several areas including establishing and renewing property-based business improvement districts, improving organizational effectiveness, placemaking, interim business district management, and parking strategy. Collectively, our team has over 100 years of experience working with people to rethink, reimagine, and create positive transformations in downtowns. As one of the original authors of California's PBID law, our team has a unique understanding of the law when it comes to forming and renewing BIDs.

International Downtown Association

The International Downtown Association (IDA) is the premier organization for urban place professionals who are shaping and activating dynamic city center districts. Our members are downtown champions who bring urban centers to life, bridging the gap between the public and private sectors. We represent an industry of more than 2,500 place management organizations, employing 100,000 people throughout North America and growing rapidly around the world. Founded in 1954, IDA is a resource center for ideas and innovative best practices in urban place management. For more information, visit downtown.org.



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SHAPING CITIES



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Image sourced from Downtown
CBD/BID online platforms

Foreword



The City and County of San Francisco's Property and Business Improvement District (PBID) program, known locally as Community Benefit Districts (CBDs) and Business Improvement Districts (BIDs), was established in 2004 with a technical assistance program through the San Francisco Office of Economic and Workforce Development and the passage of Article 15 of the Business and Tax Regulations Code. The CBD/BID program is committed to fostering a thriving and resilient economy to the many diverse, vibrant neighborhood and commercial corridors throughout San Francisco.

Since the last Impact Analysis report in 2012, the program has grown significantly. The last ten years included the creation of six new CBD/BIDs as well as the renewal and expansion of eight CBD/BIDs. Only two CBD/BIDs sunsetted, one voluntarily disbanded, and one did not renew due to not securing enough support through the special assessment election. As of August 2022, there are fifteen CBDs dispersed throughout San Francisco's downtown and neighborhood commercial areas.

Over the last 10 years, there has been a 268% increase in assessment revenue. 59% of that increase is the direct result of new districts.



The Office of Economic and Workforce Development oversees the city's CBD/BID program, ensuring that districts are compliant with state and local law, overseeing grant administrations to districts, providing technical assistance throughout the formation or renewal process, and providing guidance to districts throughout their respective terms.

We are pleased to present the following Impact Analysis of San Francisco's CBD/BID program. The analysis is based on statistical data, surveys, and comparisons to similar programs across the nation, enabling measurements for the following San Francisco's CBD/BID program goals:

- Improvement of public realm cleanliness
- Improvement of public safety
- Creation of economically viable neighborhood business districts
- Financial sustainability
- Leveraging of non-assessment resources
- Investment in and improvement to a district's physical environment
- District events, marketing, activation, and promotion
- Community participation, leadership, and coordination

— **Chris Corgas, MPA & Mimi Hiraki**
San Francisco's Property and Business Improvement District (PBID) Program Team



Executive Summary

“

For nearly 20 years, neighborhoods across the city have been served by these districts and the place management organizations that govern them.

Caring and tending to our neighborhoods is a point of pride for San Franciscans. For decades, grassroots neighborhood groups and voluntary membership associations for businesses and property owners took on the responsibility of providing additional cleaning and support for their community. When the City and County of San Francisco’s Property and Business Improvement District (PBID) program was established, San Francisco neighborhood stakeholders were granted a mechanism that allowed them to form PBID organizations. In San Francisco, these are known as Community Benefit Districts and Business Improvement Districts (CBD/BIDs).

For nearly 20 years, neighborhoods across the city have been served by these districts and the place management organizations that govern them. Each district is deeply unique and home to residents, small businesses, public spaces, and vast histories that forge one-of-a-kind identities. All were rocked by the COVID-19 pandemic. This Impact Analysis unpacks the ways CBD/BIDs served their stakeholders since 2012, including the time before and after COVID-19, and examines the areas where CBD/BIDs, the CBD/BID program, and City/CBD partnerships stand to grow and evolve.

As the second-ever published Impact Analysis of San Francisco’s CBD/BIDs program, this report synthesizes a range of qualitative and quantitative information and offers data-based findings. These findings are organized around the performance of individual CBD/BIDs, CBD/BIDs in the greater downtown area of San Francisco, neighborhood-based CBD/BIDs, and the CBD/BID program overall. Key trends and recommendations for the CBD/BID program as well as the City and County of San Francisco are included in this report as well.

Featured alongside CBD/BID data and data provided by government agencies are highlights

from constituent interviews, takeaways from a survey distributed to CBD/BID Staff and Leadership, local and national case studies, and situating data about the PBIDs across North America from the International Downtown Association. Including these sources allows this report to tell a comprehensive story about what CBD/BIDs have accomplished for their constituents and how their services have met the ever-evolving needs of their communities. Additionally, these sources and the manner by which the report is formatted intends to provide transparency and insight into CBD/BIDs, who they are, what they are, and how they do the work they do.

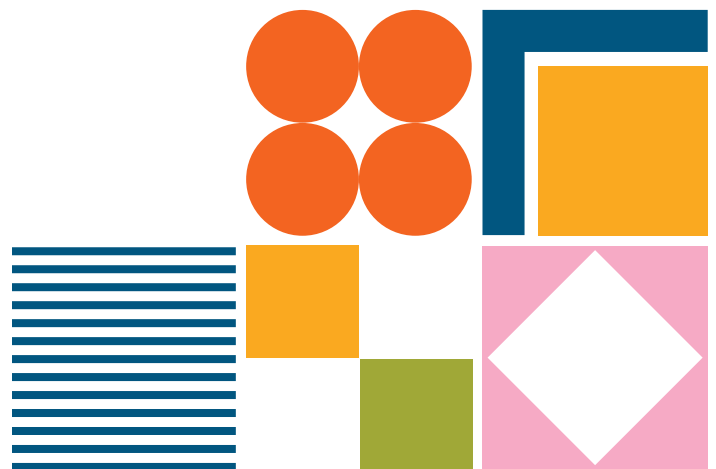
This Impact Analysis is being published in a moment of San Francisco’s history where economic hardship is deeply affecting businesses in all neighborhoods, cleanliness and safety issues are rendering public space inaccessible to residents, workers, and visitors alike, and socio-economic inequalities are leaving far too many people to suffer on our streets and sidewalks. Some of this is the result of the COVID-19 pandemic, which rocked the international economy. Yet, many of these challenges have been bubbling in San Francisco for years. CBD/BIDs are neighborhood organizations, and they know the needs, struggles, and top priorities of their communities. This report shows that CBD/BIDs are critical to the City and County of San Francisco because they are working to address these challenges and hardships.



Image sourced from Castro CBD/BID online platforms

The most significant and positive findings from this Impact Analysis are as follows:

- **CBD/BID-led analysis of their clean and safe programs enable more effective and impactful services.** Those CBD/BIDs that assess the performance of their clean and safe services on a regular basis are able to optimize their services. This regular analysis of clean and safe work could also be shared with other CBD/BIDs, and in aggregate, demonstrate areas of strength or areas that lack the necessary resources to address San Francisco's community needs at-large.
- **Perception and reality of cleanliness and safety in San Francisco is poor, and CBD/BIDs could be critical game-changers if deeper partnerships with the City and County of San Francisco are enabled.** As the City continues to introduce new programs, grant opportunities, and other solutions to address the real and perceived issues around cleanliness and safety (e.g., SF Travel Ambassadors, Shine On SF), the role of CBD/BIDs becomes more significant. These organizations have hyper-local competencies and should be key partners in these initiatives. When the gap in CBD/BID resources to address neighborhood-level needs is supplemented with City partnerships and resources, community stakeholders are better off.
- **CBD/BIDs adapted immediately to small business needs at the onset of the COVID-19 pandemic and continue to serve as hyper-local resource hubs for businesses.** CBD/BIDs were on the front line of the COVID-19 economic response for small businesses. As COVID-19 government support rolled out at the local, state, and national level, CBD/BIDs were present in the neighborhoods they served and made themselves available to businesses in need of technical and financial support.
- **Economic development collaboration between neighboring CBD/BIDs is a growing practice.** Multiple CBD/BIDs have boundaries that touch one neighborhood, and coordination between them is important to ensure that the business community understands what resources are available to them and how their area's challenges are being addressed by the greater CBD/BID community. Economic development program collaboration between CBD/BIDs could also supplement limited resources and staff capacities.
- **Property value in CBD/BIDs has increased at a rate higher than the citywide average.** Since 2017, the average percentage increase in property value for CBD/BID areas is 15% compared to the citywide average of 10%. Between 2017 and 2021, property value increased by 73% compared to the citywide increase during the same period, which was 46%.
- **The City's Shared Spaces program and partnerships with CBD/BIDs have been successful and should continue.** CBD/BIDs are a critical bridge between the Shared Spaces program and the businesses / property owners that are interested in pursuing placemaking projects. CBD/BIDs are well positioned to support their stakeholders at the neighborhood scale, optimizing the Shared Spaces program at a grassroots level by supporting individuals that may have hesitation or confusion around the permitting process.
- **CBD/BIDs are an effective voice for the community and link stakeholders with City agencies.** As advocates for their communities, CBD/BIDs can be impactful when they have staff support or other forms of support from the City. For example, CBD/BIDs have had great success with pedestrian safety projects when that support is in place, bringing traffic calming results to the communities they serve.



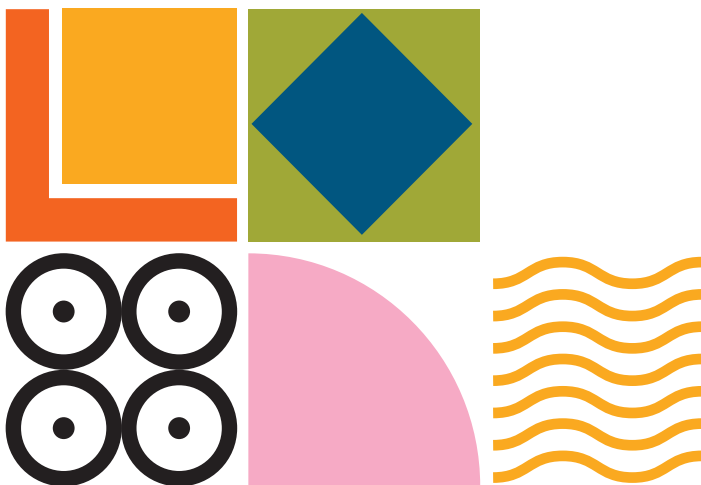
- CBD/BIDs are committed to continuing social services for their unhoused neighbors and stakeholders experiencing hardship in the public right-of-way.** While serving in outreach and social service roles is a new performance area for CBD/BIDs in San Francisco, nearly all CBD/BID Executive Directors believe their direct services or partnerships with community-based organizations should continue. CBD/BID staff that work in the neighborhood on a daily basis often know where members of the community are at in terms of services needed because they speak with them so regularly. This knowledge has yet to be wholly harnessed in San Francisco's greater effort to bridge these community members with housing and other services. CBD/BIDs are continuing to navigate their roles in the greater realm of social and human impact while remaining compassionate and committed to finding the right way to be supportive to neighbors in need.
- CBD/BIDs have maintained financial stability, despite the economic impact of COVID-19.** In 2020, the CBD/BID program's actual assessment revenue (\$30,323,485.06) exceeded budgeted revenue (\$25,954,855.58). The financial stability of CBD/BIDs is one of the reasons they are so often successful in their communities. Stability and consistency of the programs and services provides a foundation of support that holds up a neighborhood when times are tough. Also of note, when the pandemic hit, many CBD/BIDs estimated that there would be slow or no payment of assessments. However, they found that not to be the case, which may account for the slight difference in budgeted assessment revenue over actual assessment revenue.



Image sourced from Union Square
CBD/BID online platforms



Image sourced from Noe Valley
CBD/BID online platforms



Overview of CBD / BIDs and National Context



What are Community Benefit Districts?

Across North America, there are more than 2,500 place management organizations.¹ The majority of these place management organizations oversee property and business improvement districts. But what do these organizations really do?

In the last 30 years, downtowns (e.g., central business districts, Main Streets) have seen tremendous growth. CBD/BIDs were a response to the popularity of the large, indoor, often regional, shopping malls populating the United States. Main Streets and urban centers experienced an increase in crime, employees moved to suburban centers and in many cases “mom and pop” retailers struggled to survive. Restaurants and nightlife didn’t exist in these centers. A common observation in the ‘80s and ‘90s was that downtown sidewalks seemed to “roll up” after 5pm. Indoor shopping mall stayed open until 9 or 10 pm, and they were clean, safe, well-maintained, and offered easy and free access to parking. Shopping malls also had the latest and greatest retail and entertainment offerings. Shopping mall management had a marketing and event budget to continually attract shoppers into the mall. Downtown property owners and City officials saw a depletion of the city core’s economic base and knew they needed to do something to revitalize downtown, a moment in time that spurred the idea to create a steady stream of funding to the downtown property owners to provide the same offerings as the indoor mall. The CBD/BID created a collective voice for the downtown property owners and stakeholders and held some influence with City departments and electeds.

Business Improvement Districts originated in the 1960s in Toronto, Canada. A group of business owners sought a legal framework to consistently and fairly levy funds from business owners in lieu of ad-hoc fundraising. In 1969, legislation was passed in Toronto to enable this vision, establishing the business-based assessment model. Five years later, this model arrived in the United States.

Business-based special assessment districts first emerged in California with the Parking and Business Improvement District Law of 1989. This law allowed cities to form the first iteration of business improvement districts, funded by business owners. Funding enabled improvement activities for commercial corridors such as marketing and special events. The California Downtown Economic Improvement Coalition saw an outstanding need for greater organizational capacity in cities across the state, and successfully lobbied for State law that allowed for property and business assessments: State of California, Business Improvement District Law of 1994.² In 2004, Supervisor Aaron Peskin authored and the City and County of San Francisco passed Article 15 of the San Francisco Business and Tax Regulations Code, which extended the tenure of a CBD/BID from five to fifteen years as well as eased the process for forming CBD/BIDs with a lowered weighted petition threshold (from 50% down to 30%) required to initiate the legislative approval process and the special ballot election. This legislation, combined with a new technical assistance program initiated by then Mayor Gavin Newsom through the Office of Economic and Workforce Development, was instrumental in easing the process for the formation of new PBID districts in San Francisco.



**There are currently
2,500
place management
organizations across
North America.**

¹This figure is the most current count according to the International Downtown Association.

²Details about the California PBID State law can be found in the Appendix.

Generally, improvement districts represent public/private partnerships. Private and public property and/or business owners opt to make collective contributions by voting to assess themselves. These contributions, in the form of an assessment, are collected by the local municipality. California Street and Highways Code 36606 states: "Assessment' means a levy for the purpose of acquiring, constructing, installing, or maintaining improvements and promoting activities which will benefit the properties or businesses located within a property and business improvement district."

The San Francisco Community Benefit District program oversees the operation of two types of improvement districts: Property Business Improvement Districts (PBIDs), which are referred to as Business Improvement Districts (BIDs) or Community Benefit Districts (CBDs) in this report, and Tourism Improvement Districts. There are at least two other types of improvement districts in North America, including Business-Based Improvement Districts (BBIDs) and Green Benefit Districts (GBD). The latter is unique to San Francisco and there is one in operation in the city, the Dogpatch GBD. That organization is not managed by the Office of Economic and Workforce Development and is not included in this report.

A place management organization governs the CBD/BID. These organizations are private non-profit entities that are under contract with the City to administer or implement improvements, maintenance, and activities specified in the management district plan. The management district plan is the business plan

The Different Types of CBD/BIDs

- ◆ Property-based BIDs (PBID) assess real property.
- Business-based BIDs (BBID) assess business owners.
- Tourism-based BIDs assess hospitality and tourism.

Key takeaway:
CBD/BIDs are formed when private and public property owners vote to assess themselves. This creates a funding mechanism for neighborhood services.

or agreement between the property owners and the non-profit organization. These organizations receive the assessment revenue. The sum of all individual assessments the property owners pay equals the total yearly assessment of the CBD/BID and underwrites most of the annual operating expenses. The total yearly assessment is unique to each CBD/BID in San Francisco.

There is a typical evolution of a CBD/BID. Most CBD/BIDs begin with the fundamentals - a clean and safe downtown or commercial corridor. A vibrant neighborhood with a prosperous business economy needs to be clean and safe for people to live, work and play. Some CBD/BIDs may add additional services such as marketing, promotions, or events. Once those foundational programs—"clean & safe"—are doing well, an evolving and mature CBD/BID adds services such as retail recruitment, business support, planning, placemaking activities and special events. Expanding into these areas is a national best practice and a natural maturation of the place management organizations.

CBD/BID staff has evolved over the years. Thirty and forty years ago, place management organizations' staff came from diverse industries. CEOs and executive directors were former city employees, elected officials, shopkeepers, Chamber of



Commerce staff, real estate brokers, lawyers, architects, event planners, etc. The leadership varied in each CBD/BID depending on the resources and the CBD/BID's primary services (for example, a CBD/BID on the east coast employed a broker to be CEO to help fill vacant retail spaces). For decades, CBD/BID professionals have become leaders in their communities providing strategy and vision for their Main Streets and downtowns. The knowledge and expertise needed to manage a CBD/BID is vast. Today, managing a CBD/BID is now recognized as a unique career path.

The International Downtown Association (IDA) codified the profession of Place Management in 2016. Recognizing the diversity of skills and knowledge needed to be a successful leader in this industry, IDA developed seven official knowledge domains that CBD/BID professionals should use to aid in their work to shape vibrant districts. The seven domains a CBD/BID professional should be proficient in include Leadership Development, Organizational Management, Economic Development, Policy and Advocacy, Public Space Management and Operations, Planning, Design, and Infrastructure; and Marketing, Communications and Events.

In addition to annual professional conferences and educational webinars, in 2016 IDA created and launched the Emerging Leader Fellowship (ELF) program. Each year 30 emerging professionals attend a weeklong intensive program including adaptive leadership training, strategic planning and finance and place-based economic development strategies including effective communications among stakeholders. In its 7th year, over 200 participants have graduated from the ELF program. In 2021 IDA launched the Certified Leader in Place Management (LPM) certification program. This program provides LPM professionals the ability to demonstrate proficiency in all aspects of the place management profession while also maintaining a commitment to ethical conduct and personal and professional growth. By receiving this certification, it demonstrates a moderate level of professional competence in the seven content domains. Since November of 2021 thirty-six place management professionals have received their LPM designation with eight of those being from California. Both of these programs highlight the knowledge and skill-set that BID staff need in order to run successful organizations.³

Did you know...

- Business Improvement Districts originated in the 1960s in Toronto, Canada.
- When a CBD/BID is formed, they often begin with clean and safe services.
- Managing a CBD/BID is now recognized as a unique career path.



Image sourced from SOMA West CBD/BID online platforms



Image sourced from Castro CBD/BID online platforms

³See the Appendix for more detail about the IDA ELF Program.

How do CBD /BIDs serve San Francisco?

In San Francisco, CBD/BIDs cover 8% of the San Francisco geographic area, or four square miles, and include 20% of all commercially zoned parcels in the city. CBD/BID services impact thousands of San Franciscans on a daily basis. So how do these organizations work, and where do they get their funding from?

Most services of CBD/BIDs are visible to those who live, work, and visit any neighborhood within the boundaries of a CBD/BID, and some play out in less visible ways as they revolve around relationship building with government agencies and stakeholders. All CBD/BIDs in San Francisco provide cleaning and other public realm maintenance as well as placemaking and public art projects. Many oversee economic development initiatives to support local businesses and provide social and human impact support to people experiencing hardship in the public right-of-way. CBD/BIDs seek to care for their neighborhoods and ensure that their districts are attractive places for all.

These services play out in very tangible ways—clean streets, community ambassadors, increased places for people to gather—and are supplemented by the relationships CBD/BID staff are able to nurture with government agencies and community stakeholders. CBD/BID staff work with businesses and property owners directly to help them navigate City permitting processes and other types of challenges that may put

CBD/BIDs in San Francisco cover 20% of all commercially zoned land in the city.

Highlights

- ◆ CBD/BIDs are private nonprofit organizations funded by revenue from assessments.
- The creation of a CBD/BID begins when a group of neighborhood stakeholders comes together and agree that a CBD/BID would serve the neighborhood's needs
- CBD/BIDs are accountable to the people that exist in the district, including property owners, businesses, and residents.



Image sourced from Lower Polk CBD/BID online platforms

their business or building at risk. They also work with residents and other members of the community—such as people that work in the area, people that rely on the public right-of-way on a daily basis, or those who are just visiting—to ensure that they are able to access services or events put on by the CBD/BID.

San Francisco CBD/BIDs are funded by revenue from assessments and can fundraise and apply for grant funding as well. CBD/BID formation and funding methodologies involve complex processes. In general, the creation of a CBD/BID begins when a group of community members, led by property owners and businesses, comes together and agrees that a CBD/BID would benefit the neighborhood and address their needs. This group often becomes the Steering Committee for the CBD/BID formation. From there, a designated boundary of what area would be served by the CBD/BID is outlined and the set of services a CBD/BID will provide for the neighborhood and how those services will be paid for are determined. This latter part is called the assessment methodology. Community members are involved in this process. They are able to work directly with the Steering Committee, or respond to surveys sent out by the Steering Committee by mail. Once the services and assessment methodology have been confirmed, this information is shared out to property owners by mail who then can vote on the CBD/BID. Their choice: Approve the additional assessment on their property, or not approve the additional assessment on their property.

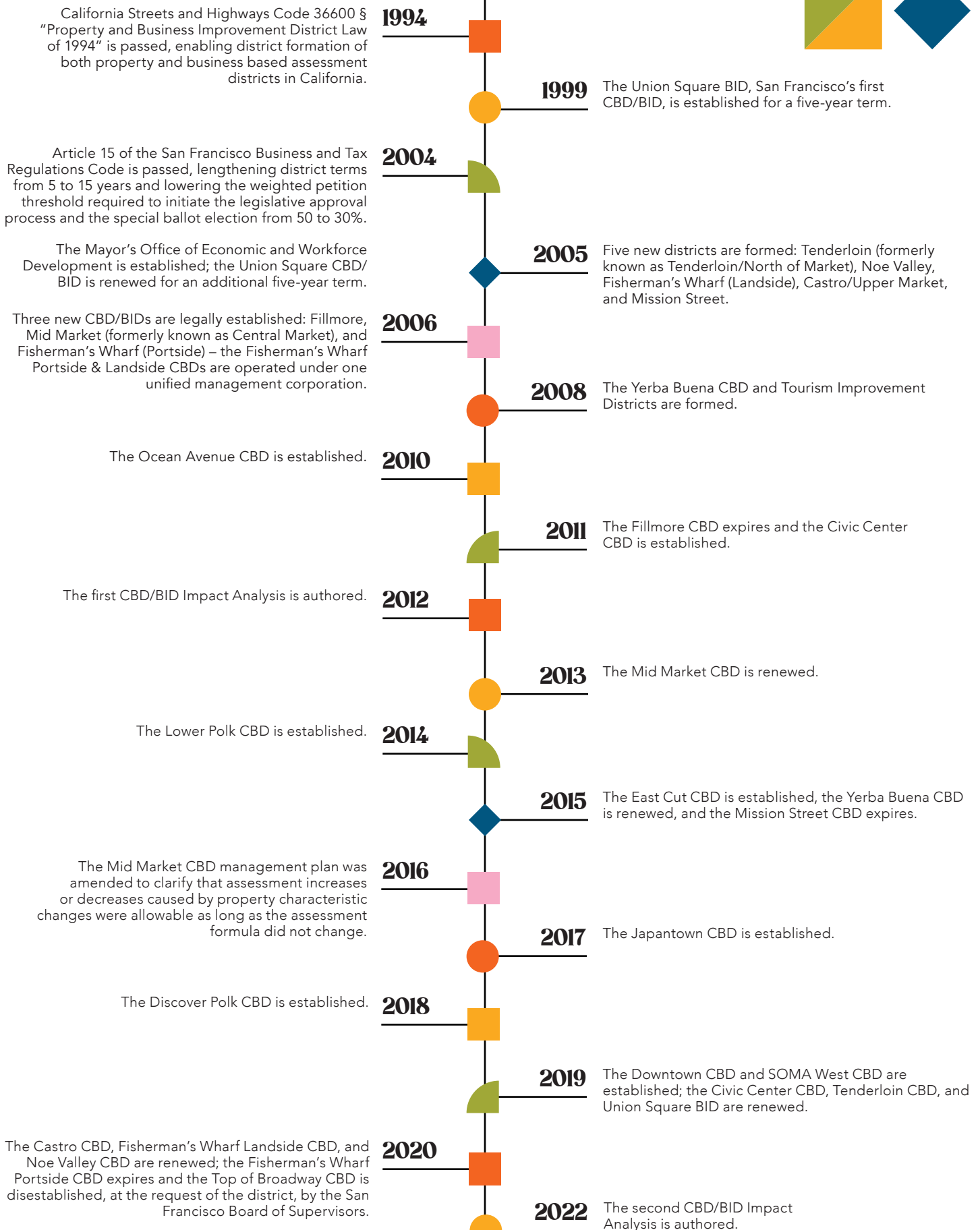


Once a CBD/BID is created, the place management organization is formed and becomes accountable to the people that exist in the boundaries of the CBD/BID, including those that pay into the assessment and district stakeholders. These are the people who are able to participate in district management as board members or in other volunteer capacities. The goals for how the Board of Directors represent the community and guide and assess the effectiveness of the CBD/BID are included in each CBD/BID's management plan, meaning these goals are determined before the creation of the CBD/BID and with the stakeholders' consent. By law, board meetings and committee meetings are open to the public, and the public is always welcome to provide feedback on action items that the CBD/BID Board of Directors is set to vote on. CBD/BIDs are also accountable to the public, and provide a mandated mid-year and annual report to the City, and participate in an annual hearing at the Board of Supervisors.

Additional detail about the CBD/BID formation process and assessment methodology examples can be found in the Appendix.⁴



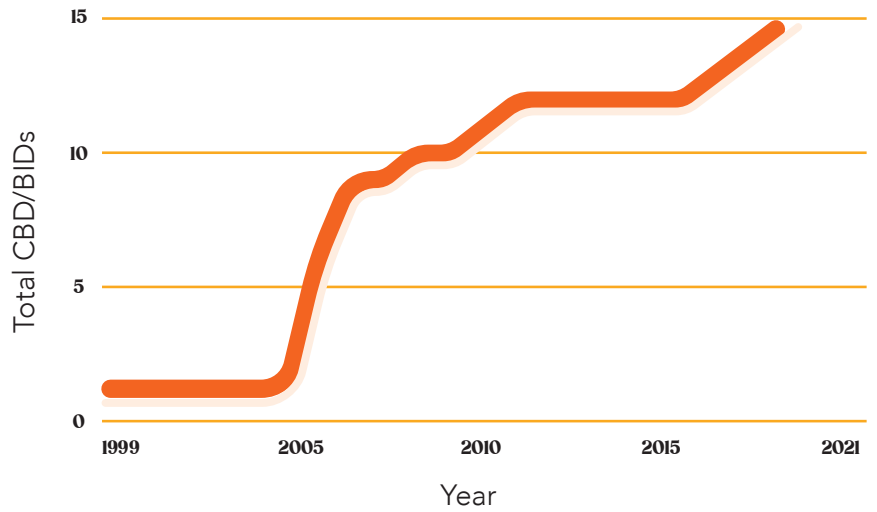
⁴A long form explanation of the CBD/BID Formation and Assessment Methodology is located in the Appendix.



8 CBD/BID Expansions & Renewals since 2012

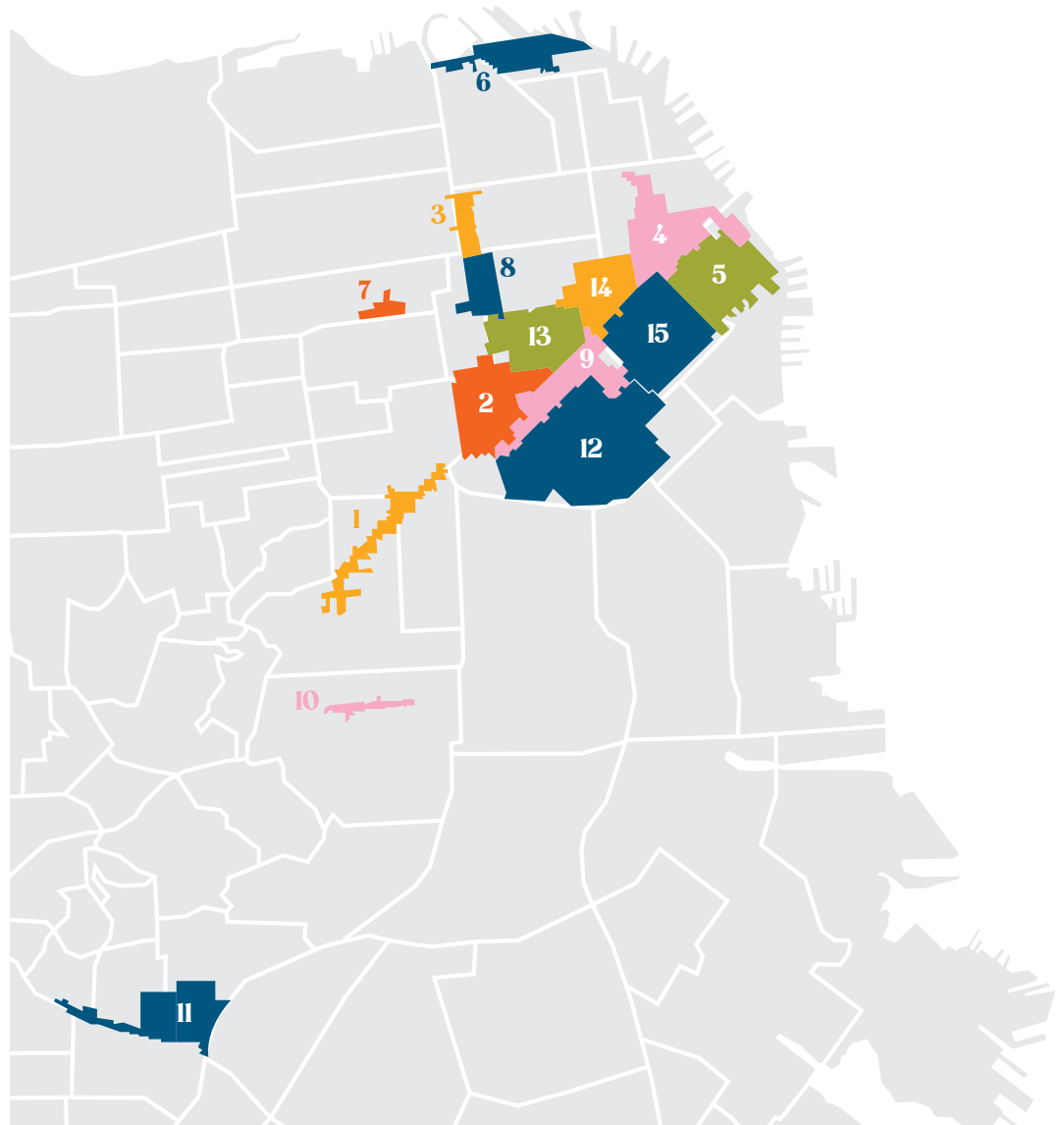
6 New CBD/BIDs since 2012

San Francisco CBD/BID Growth



CBDs of San Francisco

- 1 Castro/Upper Market
- 2 Civic Center
- 3 Discover Polk
- 4 Downtown
- 5 East Cut
- 6 Fisherman's Wharf
- 7 Japantown
- 8 Lower Polk
- 9 Mid Market
- 10 Noe Valley
- 11 Ocean Avenue
- 12 SOMA West
- 13 Tenderloin
- 14 Union Square
- 15 Yerba Buena



The National Context of CBD /BIDs

Cities across the nation have established CBD/BID programs similar to San Francisco's. In comparison to cities with similar population size, density, and income, does San Francisco have a typical number of CBD/BIDs? How does the CBD/BID assessment revenue in San Francisco compare to other cities? Who runs CBD/BIDs in other cities?

IDA compiled a list of comparable cities along with a detailed overview of each city's CBD/BID program and how the program is comparable to—and differs from—the San Francisco CBD/BID program. These similarities include city population, density, population growth, total employment, and/or household income. One key takeaway from this overview of comparable cities is that San Francisco has a higher ratio of CBD/BIDs to city population than any other comparable city except for Chicago.

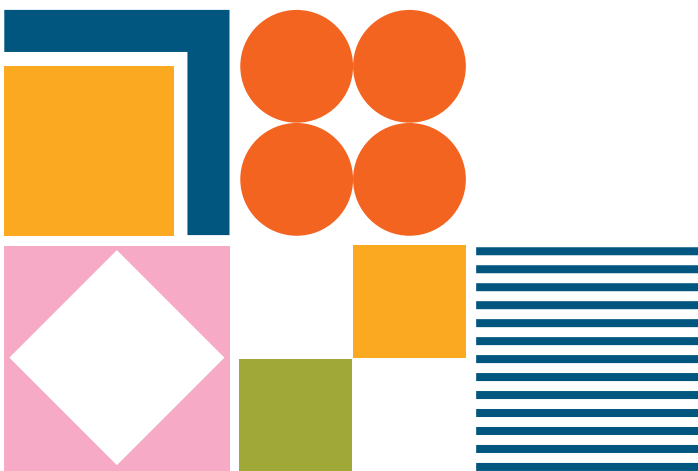
This data and the detailed overviews for each city and their CBD/BID programs provide context for the Performance Analysis section of this report as well as the information in this section, the CBD/BID Profile section, and the appendix of the report which holds details around the process of forming a CBD/BID.



Image sourced from Ocean Avenue CBD/BID online platforms



Image sourced from Fisherman's Wharf CBD/BID online platforms



Comparable CBD/BID Programs by Cities

	# of CBD/BIDs	City Department	City Population	City Population Density*	Pop Growth 2010 – 19	Total Employment in City	Median Household Income
San Francisco	15	OEWD	875,000	18,654	10%	707,000	112,449
NYC	76	Small Business Services	8.4 mil.	28,028	2%	4,603,187	63,998
LA	43	City Clerk	4 mil.	8,459	5%	1,905,640	62,142
Chicago	56	Planning & Development	2.7 mil.	11,916	0%	1,416,300	58,247
San Diego	18	Economic Development	1.4 mil.	4,325	9%	822,407	79,673
Washington DC	11	Small & Local Business Development	693,000	11,330	17%	529,000	86,420
Seattle	11	Office of Economic Development	724,000	8,637	24%	582,796	92,263

*Population Density is computed by dividing the total population by Land Area Per Square Mile.

Source: IDA Analysis, U.S. Census, and Longitudinal Employer-Household Dynamics (LEHD), Accessed: 2022.



New York

New York City has the most BIDs of any city in the U.S, with 76 as of 2021. New York City serves as a strong comparison city to San Francisco to illustrate how a much more expansive, but still neighborhood-focused BID program operates. The program is one of the largest and oldest in the nation, with more than 40 years of operation and coverage across all five boroughs. The BID program is managed by the Department of Small Business Services (SBS) Neighborhood Development Division, and SBS staff sit on each BIDs Board and Finance and Audit Committee as the Mayor's representative. In FY 2020, BIDs invested \$170M in supplemental services into the city. SBS counts that BIDs serve 292 linear miles of the city, 93,000 total businesses, and 22,864 ground-floor storefronts throughout the city. SBS groups BID services into sanitation, marketing & public events, public safety, and streetscape & beautification.

There is wide variation in the capacity of BIDs in New York City. The smallest BID (180th St BID) has a budget of just \$63,000 for an area of 8,150 linear feet while the largest BID, Times Square Alliance, has a budget of nearly \$22M for an area covering 52,800 linear feet. The median budget is \$530,442.

[NYC Business Improvement Districts](#)



Image sourced from Civic Center CBD/BID online platforms



Los Angeles

Los Angeles has 43 BIDs, which includes 38 property-based and five merchant-based citywide. The BID program is the largest of any city on the West Coast and covers land across 13 of the 15 Council districts. It serves as a strong comparison to San Francisco's program because Los Angeles also falls under California's BID legislation and faces many of the same challenges in the city as in San Francisco, especially as it relates to homelessness.

The BID Division of the Office of the City Clerk facilitates the establishment and renewal of BIDs, and administers the BID Trust Fund which collects \$65 million annually through assessments on behalf of the BIDs. The program describes BIDs as those who provide supplemental services including cleaning streets, providing security, making capital improvements, construction of pedestrian and streetscape enhancements, marketing, and increasing economic development and livability. There is wide variation in the capacity of BIDs in Los Angeles. The smallest has a budget of \$60,000 covering just one block, while the largest BID covers 130 blocks with a budget of \$6M. The average is \$1.1M.

[Los Angeles Business Improvement Districts](#)

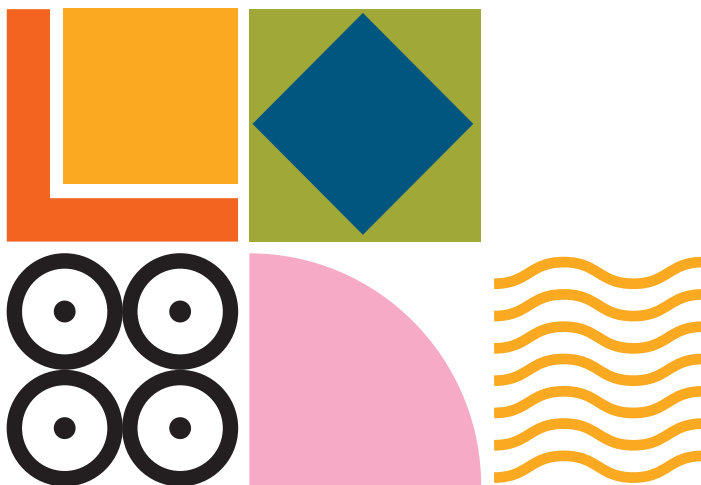
Chicago

Chicago has 56 Special Service Areas (SSAs), putting it in a class with New York and Los Angeles in number of place management organizations. A much larger city with different population trajectories than San Francisco, the SSA model in Chicago offers a different approach to how BIDs are managed.

Chicago's SSAs are much smaller in average budget than found in New York and Los Angeles. SSAs in Chicago has a cumulative total revenue of \$25.2 million in 2020, for an average just under a half million each.

The City of Chicago Department of Planning and Development helps provide oversight for and facilitates the BID activities, and each non-profit SSA provider has a service contract with the city. Each SSA has a board of commissioners which is made up of district property owners or lessees appointed by the Mayor and confirmed by the city council. These commissioners undertake such activities as recommending annual service plans and budgets with the non-profit service provider. These SSAs also vary widely in size and scope, from the smallest, Walden Parkway, which has \$10,000 in revenue and no staff on payroll, to the largest, State Street, which has a total budget of almost \$3 million covering public safety, economic development, public way aesthetics, and customer attraction.

 [Chicago Special Service Area \(SSA\) Program](#)



San Diego

San Diego has two Property Business Improvement Districts (PBID), which can assess property owners and 18 business-based business improvement districts (BIDs) which assess the business instead of the property owner. San Diego is a good comparison for San Francisco because its BIDs also follow the same California legislation, and the city also has many of the same trends as San Francisco, even though it has a higher population but lower density.

The Downtown PBID is the largest PBID in San Diego. It was formed in 2000. The Downtown PBID contract is managed by the Clean and Safe Program of the San Diego Downtown Partnership and collects \$8.3 million in assessment revenue. The PBID includes most of downtown and has six different benefit zones.

San Diego has the most BIDs in the state. The 18 business based BIDs collect assessments from businesses which results in a smaller revenue stream than a PBID. In order to offer marketing and public improvement projects to their businesses, the BIDs often supplement their budgets with special events, including farmers markets. San Diego's PBIDs are part of the San Diego BID Alliance and meet regularly with the City of San Diego's Economic Development Department.

 [San Diego's Business Improvement Districts](#)

Washington, D.C.

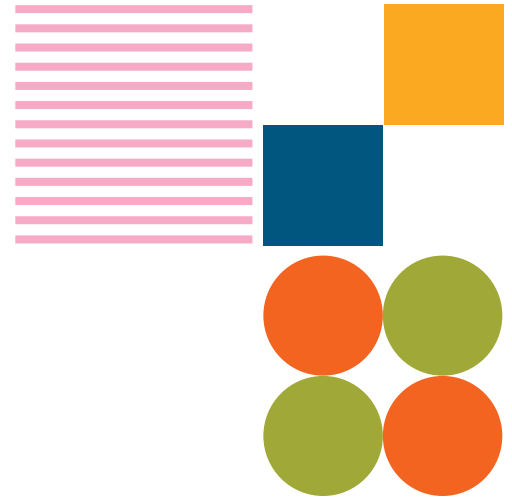
Washington, D.C. has 11 BIDs. Washington, DC is a strong comparison to San Francisco because the city population is at a similar scale, with a higher median-income than most other American cities. The number of BIDs are also similar to San Francisco.

While a much lower number than larger cities such as New York or Chicago, DC's BIDS cover 8% of the city's land area, and 65% of jobs in the city. DC's BIDS also tend to be of larger capacity than the average BID in other cities, with the average BID having about \$5 million in total revenue. The largest of these in assessed revenues is the Downtown DC BID, with almost \$10 million in assessed revenues. While BIDs in DC are not required to have city officials on their Board of Directors, some BIDs include Advisory Neighborhood Commissioners as ex-officio members of their board. BIDs in DC are supported by the Department of Local and Small Business Development, which schedules public hearings on behalf of proposed new BIDs. After its formation, the BIDs in DC work closely with the DC Office of Tax and Revenue to collect assessments. DC's BIDs support their districts with a range of services, focusing on beautification, placemaking, social services, and economic development. DC also has a BID Council, one of the few citywide BID associations that has a staff member to coordinate and advocate for common interests amongst the 11 BIDs.

[!\[\]\(99f58673407353e96a019fbca558fd72_img.jpg\) Washington, D.C. 2018 BID Profiles](#)



Image sourced from Ocean Avenue CBD/BID online platforms



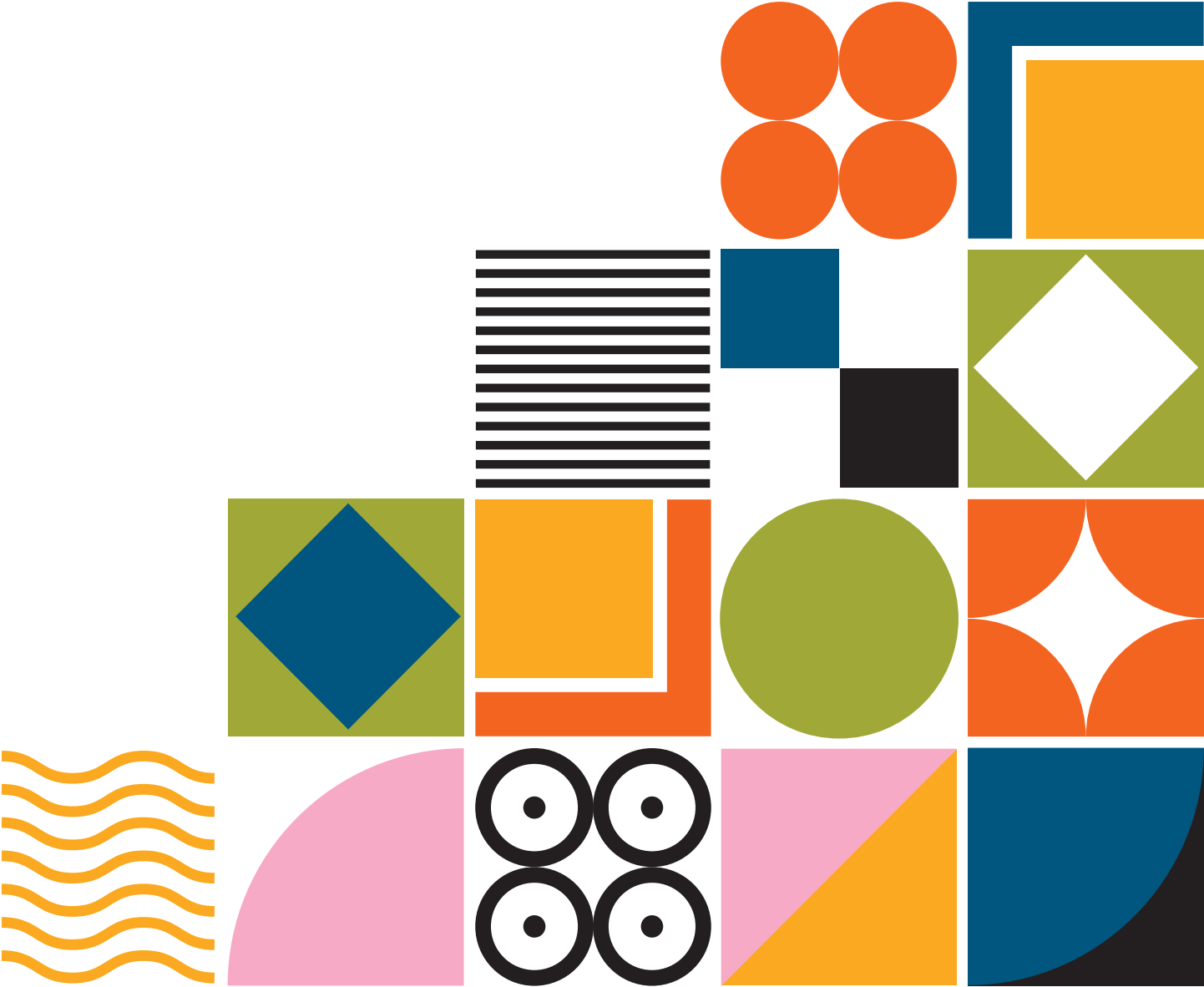
Seattle

Seattle has 11 Business Improvement Areas (BIAs), with three BIAs having been established in the last decade. Seattle serves as a good comparison to San Francisco because the city is of a similar population and demographic makeup, especially with many younger workers in the tech industry.

In total, the Seattle Office of Economic Development calculates that these districts cover about 15% of Seattle's total lot square miles, and 40% of Seattle's total appraised land property value. These BIAs invested over \$22 million in improvement activities in 2018, providing a range of services. Seattle's BIA's each have a Board of Directors made up of ratepayers, generally a mix of business representatives, property owners, and residents. All of Seattle's BIAs provide at least professional management and advocacy services, and most include economic development, public realm improvements, marketing, and clean & safe programs. BIAs in Seattle have a wide variance in the size of their budgets, not unlike Los Angeles and New York. The Metropolitan Improvement District, part of the Downtown Seattle Association, collected over \$10.6 million in assessments in 2018 and is far larger than all other BIAs in the city. All BIAs have a budget below \$1 million, ranging all the way down to the smallest BIA (Columbia City BIA), which collected \$69,000 in assessments in 2018.

[!\[\]\(c50c8b7b2cc2cf9ff925edec0ee94c0d_img.jpg\) Seattle Business Improvement Areas 2018-19 Report](#)

San Francisco CBD / BID Profiles





2005	2020	6/30/2035
Year Established	Year Renewed	Sunset Date

The Castro is well-known for its LGBTQ+ community and history as well as its mix of small business corridors. The main business thoroughfare is surrounded by residential streets, and the MUNI station in the neighborhood ensures Castro's role as a thoroughfare for commuters in the surrounding area. With a vibrant nightlife and as a destination during major events such as Pride month, the CBD balances the daily neighborhood needs with those of the annual visitors to the district.

Staff

Executive Director	Andrea Aiello
Number of Board Members	10
Approximate Staff Count	15
<i>(In-house and contracted)</i>	
Committees	7
<ul style="list-style-type: none"> Executive Retail Strategies Beautification Castro Cares 	<ul style="list-style-type: none"> Land Use Finance Services

Area Demographics

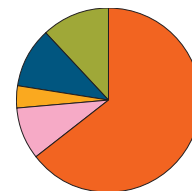
Race/ethnicity
68.9% White
14.4% Asian
8% Latino/Hispanic
4.9% Two or More Race
3.1% African American/Black
.2% American Indian/Alaskan Native
.2% Native Hawaiian/Pacific Islander
.2% Other Race

Finances

Assessment Submission	\$818,991.62
Management plan budget allocation:	
67%	Cleaning Services
31%	Administration and Contingency
1%	Marketing
<1%	Landscaping

Age

0-4 yrs., 4.2%	55-64 yrs., 12.2%
Under 18, 9.5%	65 & Older, 11%
18-54 yrs., 67.4%	

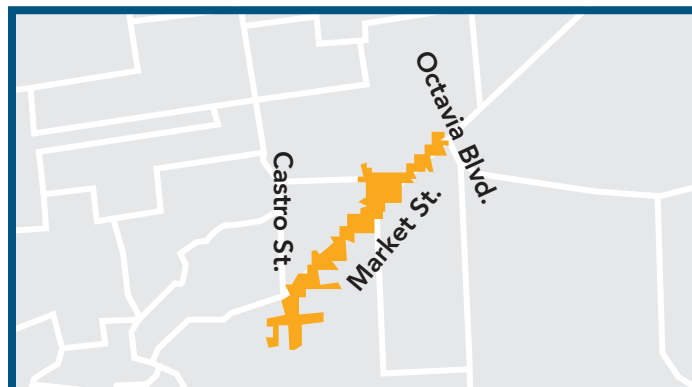


Median Household Income — \$162,555

Services Provided

- Sidewalk Maintenance & Cleaning
- Business Attraction
- Public Safety/Security
- Public Information and Awareness
- District ID/Streetscape

District Overview



Size in Sq. Mi. — 0.17

Assessed Parcels/Blocks — 586 parcels on 28 full or partial blocks

Sources: CBD/BID Annual Reports and Executive Director Interviews; American Community Survey Neighborhood Profile, Castro Neighborhood (2019). This demographics data is associated with ACS data and not the exact geography of the CBD/BID districts. A map with the ACS Neighborhoods can be viewed in the Appendix.



2011	2019	6/30/2034
Year Established	Year Renewed	Sunset Date

Civic Center includes San Francisco’s City Hall, the adjacent public spaces and buildings, and a number of legendary cultural institutions such as the Main Public Library, Asian Art Museum, Bill Graham Civic Auditorium, San Francisco Symphony Hall, San Francisco Opera, and the Orpheum theater. The ample open space hosts many visitors to the city as well as locals and workers in the area as Civic Center Plaza and United Nations Plaza offer events, programs, and a weekly farmer’s market, activity that underpins the mission of the CBD.

Staff

- Executive Director** — Tracy Everwine
- Number of Board Members** — 18
- Approximate Staff Count** — 25
(In-house and contracted)
- Committees** — 4
 - Executive
 - Budget & Finance
 - Streetscape and Safety
 - Capital Improvements

Area Demographics

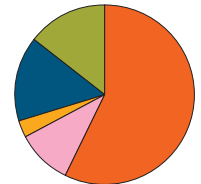
- Race/ethnicity**
- 31.8% **White**
 - 28.9% **Asian**
 - 24.1% **Latino/Hispanic**
 - 9.4% **African American/Black**
 - 3.9% **Two or More Race**
 - 1.2% **American Indian/Alaskan Native**
 - .4% **Native Hawaiian/Pacific Islander**
 - .4% **Other Race**

Finances

- Assessment Submission** — \$3,178,521.86
- Management plan budget allocation:**
- 75.31% **Clean/Safe/Activation**
- 17.16% **Administration/Contingency**
- 7.53% **Marketing/Communication**

Age

- 0-4 yrs., 3.2%
- 55-64 yrs., 14.9%
- Under 18, 10.3%
- 65 & Older, 15.7%
- 18-54 yrs., 59.1%



Median Household Income — \$35,654

Services Provided

- Daily Cleaning and Maintenance
- Safe Program - Safety Ambassadors and Safety Stewards
- Sidewalk and Open Space Activation
- Destination Marketing and Branding
- District Stakeholder Outreach

District Overview



Size in Sq. Mi. — 0.33

Assessed Parcels/Blocks — 722 parcels on 43 whole or partial blocks

Sources: CBD/BID Annual Reports and Executive Director Interviews; American Community Survey Neighborhood Profile, Tenderloin Neighborhood, (2019). This demographics data is associated with ACS data and not the exact geography of the CBD/BID districts. A map with the ACS Neighborhoods can be viewed in the Appendix.

Discover Polk

2018
Year Established

6/30/2029
Sunset Date

Polk Street between Broadway and California Street is home to a number of historical businesses and up-and-coming establishments as well as one of the few cable car stops in San Francisco. The CBD district includes a substantial number of residential units, with nearly half of the assessment revenue coming from condominium owners. While a small neighborhood, the history of Polk Street and proximity to North Beach and Chinatown ensures steady tourism and the CBD focuses on events and programs to serve all who live and visit.

Staff

Executive Director — Duncan Ley and Ben Bleiman

Number of Board Members — 13

Approximate Staff Count — 7

(In-house and contracted)

Committees — The organization does not have official committees at this time.

Area Demographics

Race/ethnicity

63.7% **White**

27.2% **Asian**

5.8% **Latino/Hispanic**

1.7% **Two or More Race**

1.4% **African American/Black**

.1% **Other Race**

0% **Native Hawaiian/Pacific Islander**

0% **American Indian/Alaskan Native**

Finances

Assessment Submission — \$635,238.70

Management plan budget allocation:

67% **Environmental Enhancements**

21% **District Coordinator, Admin & Reserve**

12% **Economic Enhancements**

Age

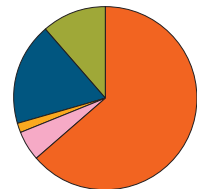
0-4 yrs., 1.5%

55-64 yrs., 11.4%

Under 18, 5.6%

65 & Older, 18.4%

18-54 yrs., 64.6%



Median Household Income — \$144,372

Services Provided

● Cleaning and Maintenance Services

● Marketing and District Branding

● Streetscape Enhancements

● Business Retention and Recruitment Efforts

District Overview



Size in Sq. Mi. — 0.08

Assessed Parcels/Blocks — 535 parcels on 14 whole or partial blocks.

Sources: CBD/BID Annual Reports and Executive Director Interviews; American Community Survey Neighborhood Profile, Russian Hill Neighborhood, (2019). This demographics data is associated with ACS data and not the exact geography of the CBD/BID districts. A map with the ACS Neighborhoods can be viewed in the Appendix.

Downtown

2019
Year Established

6/30/2034
Sunset Date

The area of downtown served by the Downtown CBD is the heart of the city’s Financial District, or FiDi. This area is known to be bustling with office workers, tourists, and a growing number of residents. A number of landmarks in the district, such as the Transamerica Tower, and historical sites, such as Jackson Square, are a draw for San Franciscans and visitors alike. While home to ample office space, the CBD envisions the future for the area as one defined by neighborhood characteristics and is nurturing relationships with local artists and residents.

Staff

Executive Director ————— **Robbie Silver**

Number of Board Members ————— **17**

Approximate Staff Count ————— **33**

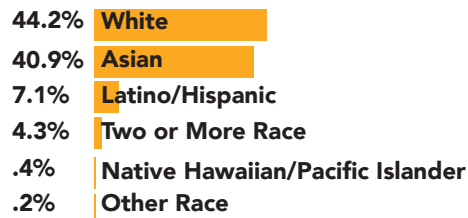
(In-house and contracted)

Committees ————— **5**

- Executive
- Clean and Safe
- District Identity
- Streetscape Improvements
- Finance

Area Demographics

Race/ethnicity



Finances

Assessment Submission ————— **\$4,005,975.14**

Management plan budget allocation:

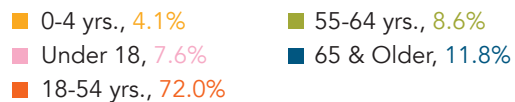
77.45% **Civil Sidewalks/Mobility Management**

14.20% **Program Management**

5.16% **District Identity, Marketing and Public Space Development and Management**

3.19% **Contingency**

Age



Median Household Income ————— **\$183,787**

Services Provided

- Cleaning and Maintenance Services
- “Live Well, Live Safe” Program
- Destination Marketing
- District Identity and Streetscape Improvements
- Banner Programs and Public Art Displays

District Overview



Size in Sq. Mi. ————— **0.33**

Assessed Parcels/Blocks ————— **669 parcels on 43 whole or partial blocks**

Sources: CBD/BID Annual Reports and Executive Director Interviews; American Community Survey Neighborhood Profile, Financial District Neighborhood, (2019). This demographics data is associated with ACS data and not the exact geography of the CBD/BID districts. A map with the ACS Neighborhoods can be viewed in the Appendix.

East Cut



2015	6/30/2030
Year Established	Sunset Date

East Cut is a section of downtown San Francisco that grew substantially over the course of the 2010s when zoning was changed and skyscrapers began to rise, creating new office space and residential options in San Francisco. Home to a number of green spaces, including Salesforce Park, the CBD has played a major role in shaping the neighborhood's burgeoning identity as a place where San Franciscans can live, work, and play.

Staff

Executive Director	Andrew Robinson
Number of Board Members	23
Approximate Staff Count	27
<i>(In-house and contracted)</i>	
Committees	9
<ul style="list-style-type: none"> Executive Economic Development Personnel Audit Nominating Finance 	<ul style="list-style-type: none"> Salesforce Park Neighborhood Parks and Cleaning Street Services and Cleaning

Area Demographics

Race/ethnicity

44.2%	White
40.9%	Asian
7.1%	Latino/Hispanic
4.3%	Two or More Race
.4%	Native Hawaiian/Pacific Islander
.2%	Other Race

Finances

Assessment Submission **\$4,316,673.80**

Management plan budget allocation:

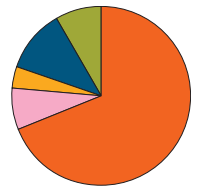
39.27%	Public Safety
25.05%	Cleaning and Maintenance
13.75%	Parks and Greenspace
12.88%	Operations
5.87%	Management
3.19%	Communication and Development

Services Provided

- Community Guides
- Neighborhood Parks and Greenspace Management
- Street Safety
- Special Event Programming
- Neighborhood Cleanliness
- Business Promotion and Economic Development

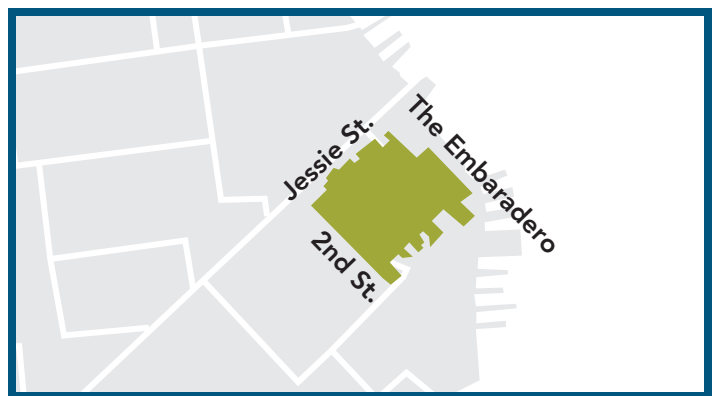
Age

0-4 yrs., 4.1%	55-64 yrs., 8.6%
Under 18, 7.6%	65 & Older, 11.8%
18-54 yrs., 72.0%	



Median Household Income **\$183,787**

District Overview



Size in Sq. Mi. **0.36**

Assessed Parcels/Blocks **57 whole or partial blocks**

Sources: CBD/BID Annual Reports and Executive Director Interviews; American Community Survey Neighborhood Profile, Financial District Neighborhood, (2019). This demographics data is associated with ACS data and not the exact geography of the CBD/BID districts. A map with the ACS Neighborhoods can be viewed in the Appendix.

Fisherman's Wharf

2005	2020	6/30/2035
Year Established	Year Renewed	Sunset Date

Fisherman's Wharf is one of the biggest destinations for visitors to San Francisco. The neighborhood is home to a number of classic San Francisco businesses and institutions, including Ghirardelli Square. The CBD maintains the landside of the neighborhood, where small businesses are nestled in with popular plazas and parks.

Staff

Executive Director	Randall Scott
Number of Board Members	16
Approximate Staff Count <i>(In-house and contracted)</i>	16
Committees	3
<ul style="list-style-type: none"> Executive Marketing Safety Outreach 	

Finances

Assessment Submission	\$1,218,900.68
Management plan budget allocation:	
45%	Clean and Safe
26%	Marketing and Events Program
20%	Admin Costs
9%	Contingency/Reserve Allocation

Services Provided

- Cleaning Program
- Marketing Program
- Safety Program
- Events

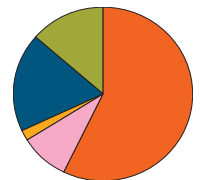
Area Demographics

Race/ethnicity

47.1%	White
37.7%	Asian
8.1%	Latino/Hispanic
4.1%	Two or More Race
2.6%	African American/Black
.2%	Other Race
.1%	American Indian/Alaskan Native
.1%	Native Hawaiian/Pacific Islander

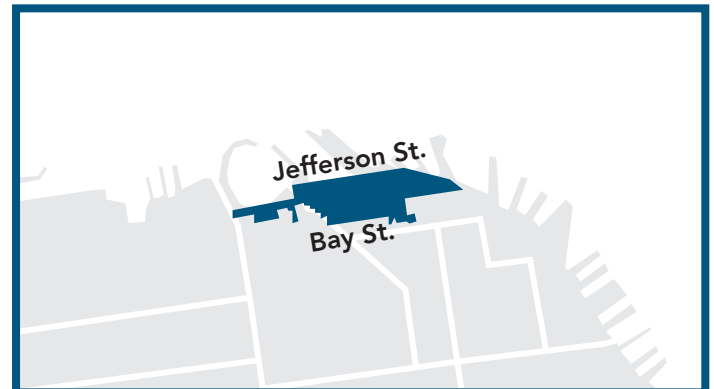
Age

■ 0-4 yrs., 2%	■ 55-64 yrs., 13.7%
■ Under 18, 9.3%	■ 65 & Older, 18.6%
■ 18-54 yrs., 58.4%	



Median Household Income — **\$88,275**

District Overview



Size in Sq. Mi. — **0.18**
Assessed Parcels/Blocks — **718 parcels**

Sources: CBD/BID Annual Reports and Executive Director Interviews; American Community Survey Neighborhood Profile, North Beach Neighborhood, (2019). This demographics data is associated with ACS data and not the exact geography of the CBD/BID districts. A map with the ACS Neighborhoods can be viewed in the Appendix.

Japantown

2017	6/30/2027
Year Established	Sunset Date

One of three remaining Japantown neighborhoods in the United States, San Francisco's Japantown is a multicultural hub and the historical heart of the Japanese community. The neighborhood boasts a number of Japanese businesses and pan-Asian establishments and orbits around a large public, open space known as Peace Plaza. The CBD strives to tailor their support and advocacy to the unique needs of the businesses.

Staff

Executive Director	Grace Horikiri
Number of Board Members	11
Approximate Staff Count <i>(In-house and contracted)</i>	5
Committees	1
• Marketing	

Area Demographics

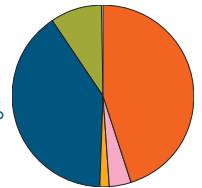
Race/ethnicity	
46.2%	White
32.8%	Asian
9.3%	Latino/Hispanic
9.2%	Two or More Race
1.6%	African American/Black
.8%	Native Hawaiian/Pacific Islander
.2%	American Indian/Alaskan Native
.0%	Other Race

Finances

Assessment Submission	\$393,750.30
Management plan budget allocation:	
48.75%	Economic Enhancements
31.25%	Environmental Enhancements
17.50%	Advocacy/Administration
2.50%	CBD Reserve

Age

0-4 yrs., 1.7%	55-64 yrs., 9.6%
Under 18, 3.8%	65 & Older, 40.6%
18-54 yrs., 46.0%	

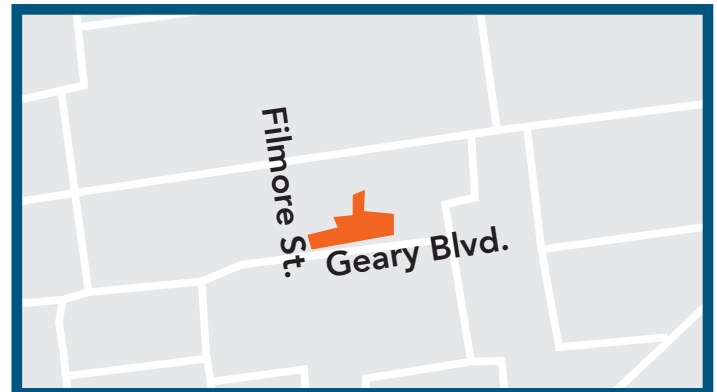


Median Household Income — \$88,065

Services Provided

- | | |
|-------------------------------|--|
| ● Environmental Enhancements | ● Economic Enhancements |
| ● Sidewalk Sweeping | ● Business Liaison to Assist Local Merchants |
| ● Litter Removal | ● Marketing and Promotion |
| ● Graffiti Removal | ● Events |
| ● Sidewalk Pressure Washing | |
| ● Signage | |
| ● Beautification Improvements | |

District Overview



Size in Sq. Mi. — 0.04
Assessed Parcels/Blocks — 67 parcels on 7 whole blocks

Sources: CBD/BID Annual Reports and Executive Director Interviews; American Community Survey Neighborhood Profile, Japantown Neighborhood, (2019). This demographics data is associated with ACS data and not the exact geography of the CBD/BID districts. A map with the ACS Neighborhoods can be viewed in the Appendix.

Lower Polk



2014 Year Established	6/30/2029 Sunset Date
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The Lower Polk neighborhood sits at the crossroads of several diverse neighborhoods, and the constituents and businesses of the neighborhood reflect this cross section of stakeholders. Known for nightlife destinations and decorated alleyways, the neighborhood is a healthy mix of small business and residents. The CBD’s services for tenants and landlords through the Tenant Landlord Clinic brings resources and stability to the diverse neighborhood.

Staff

Executive Director	Chris Schulman
Number of Board Members	11
Approximate Staff Count <i>(In-house and contracted)</i>	7
Committees	1
• Executive	

Area Demographics

Race/ethnicity	
48%	White
33%	Asian
10.7%	Latino/Hispanic
4.2%	Two or More Race
.3%	Native Hawaiian/Pacific Islander
.1%	Other Race

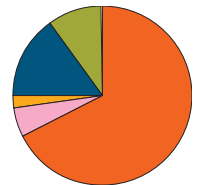
Finances

Assessment Submission	\$897,553.68
Management plan budget allocation:	

57%	Cleaning, Safety, and Maintenance
28%	Operations and Management
11%	District Identity, Marketing, Branding, and Events
4%	Contingency and Reserves

Age

0-4 yrs., 2.2%	55-64 yrs., 10.1%
Under 18, 5.5%	65 & Older, 15.3%
18-54 yrs., 69.1%	



Median Household Income	\$91,084
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Services Provided

- Public Safety
- Sidewalk Cleaning
- Maintenance
- Streetscape Improvements
- Marketing
- Beautification
- Economic Viability

District Overview



Size in Sq. Mi.	0.12
Assessed Parcels/Blocks	307 on 22 whole or partial blocks

Sources: CBD/BID Annual Reports and Executive Director Interviews; American Community Survey Neighborhood Profile, Nob Hill Neighborhood, (2019). This demographics data is associated with ACS data and not the exact geography of the CBD/BID districts. A map with the ACS Neighborhoods can be viewed in the Appendix.

Mid Market

2006	2013	6/30/2028
Year Established	Year Renewed	Sunset Date

Mid Market is a core district of Market Street, home to art galleries, tech companies, and theaters. The neighborhood was historically a theater and film house destination, and today is known for its art and cultural scene. The CBD offers an art walk that provides to locals and visitors with the guidance to explore the known and lesser known art destinations in the neighborhood.

Staff

Executive Director	Tracy Everwine
Number of Board Members	11
Approximate Staff Count <i>(In-house and contracted)</i>	19
Committees	2
• Executive	
• Finance	

Area Demographics

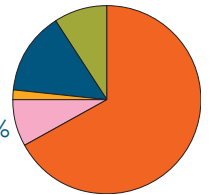
Race/ethnicity	
38.7%	Asian
29.8%	White
16.8%	Latino/Hispanic
8.7%	African American/Black
4.6%	Two or More Race
.7%	Other Race
.6%	Native Hawaiian/Pacific Islander
.1%	American Indian/Alaskan Native

Finances

Assessment Submission	\$1,694,614.78
Management plan budget allocation:	
35.2%	Public Safety
28.7%	Cleaning and Maintenance
24.6%	Economic Development, Marketing/Promotion, Management
11.5%	Contingency

Age

0-4 yrs., 1.7%	55-64 yrs., 9.1%
Under 18, 8.3%	65 & Older, 14.5%
18-54 yrs., 68.2%	

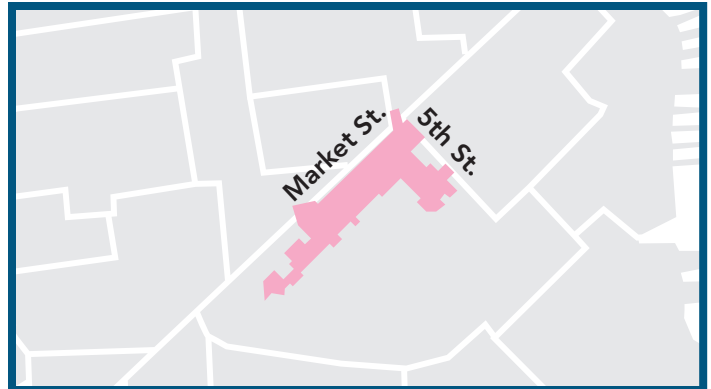


Median Household Income — \$75,641

Services Provided

- Safety
- Economic Development
- 10B Officer Program
- Management
- Cleaning/Maintenance

District Overview



Size in Sq. Mi. — 0.25

Assessed Parcels/Blocks — 1088 parcels

Sources: CBD/BID Annual Reports and Executive Director Interviews; American Community Survey Neighborhood Profile, South of Market Neighborhood, (2019). This demographics data is associated with ACS data and not the exact geography of the CBD/BID districts. A map with the ACS Neighborhoods can be viewed in the Appendix.

Noe Valley

2005	2020	6/30/2035
Year Established	Year Renewed	Sunset Date

Noe Valley is a cozy neighborhood known as a residential area with a bustling main street beloved by the community. A major point of gathering for community members and visitors to the neighborhood is Noe Valley Town Square, which is located along 24th Street. The CBD helps the programming on the site as the fiscal sponsor. Noe Valley is tucked in between the Bernal Heights, Castro / Eureka Valley, Mission neighborhoods.

Staff

Executive Director ————— Debra Niemann
Number of Board Members ————— 8
Approximate Staff Count ————— 7
(In-house and contracted)
Committees ————— 1

- Clean and Green

Finances

Assessment Submission ————— \$248,541.48

Management plan budget allocation:

70%	Public Rights of Way and Sidewalk Operations (PROWSO)
14%	Administrative/Corporate Operations
9%	District Identity and Streetscape Improvements (DISI)
7%	Contingency/Reserves

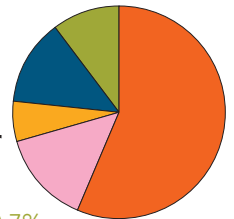
Services Provided

- Clean and Green
- Promotion of District
- Administration
- Contingency and Reserve

Area Demographics

Race/ethnicity

65.7%	White
14.1%	Asian
11.5%	Latino/Hispanic
5.6%	Two or More Race
2.0%	African American/Black
.9%	Other Race
.1%	American Indian/Alaskan Native
.1%	Native Hawaiian/Pacific Islander

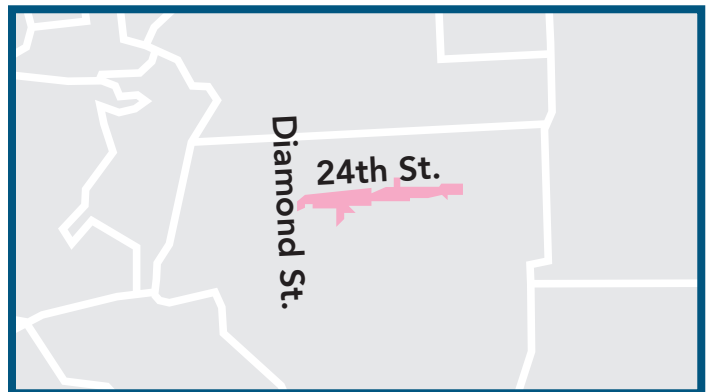


Age

0-4 yrs., 6.6%	55-64 yrs., 10.7%
Under 18, 15.0%	65 & Older, 14.0%
18-54 yrs., 60.3%	

Median Household Income ————— \$175,132

District Overview



Size in Sq. Mi. ————— 0.05

Assessed Parcels/Blocks ————— 218 parcels on 10 whole or partial blocks

Sources: CBD/BID Annual Reports and Executive Director Interviews; American Community Survey Neighborhood Profile, Noe Valley Neighborhood, (2019). This demographics data is associated with ACS data and not the exact geography of the CBD/BID districts. A map with the ACS Neighborhoods can be viewed in the Appendix.

Ocean Avenue Association

2010
Year Established

6/30/2025
Sunset Date

Ocean Avenue is the main thoroughfare for the Ingleside and Oceanview neighborhoods. The area is largely residential, though Ocean Avenue boasts a number of small businesses. The CBD has focused a great deal of their energy supporting the unique needs of the businesses in the neighborhood, which serve long time residents, newcomers, and the community college in the area, City College of San Francisco.

Staff

Executive Director	Christian Martin
Number of Board Members	13
Approximate Staff Count <i>(In-house and contracted)</i>	11
Committees	2
• Street Life	
• Business	

Finances

Assessment Submission \$339,580.72

Management plan budget allocation:

51.65%	Cleaning, Maintenance, and Safety Program
26.03%	Management Operations
18.04%	Marketing Streetscape Improvements and Beautification Program
4.27%	Contingency and Reserves

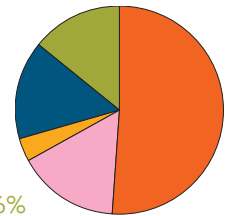
Services Provided

- Cleaning and Maintenance
- Safety
- Marketing
- Streetscape Improvements and Beautification

Area Demographics

Race/ethnicity

57.8%	Asian
14.9%	Latino/Hispanic
13.4%	White
10.2%	African American/Black
3.4%	Two or More Race
.2%	Other Race
.1%	Native Hawaiian/Pacific Islander
.1%	American Indian/Alaskan Native



Age

0-4 yrs., 3.9%	55-64 yrs., 14.6%
Under 18, 16.4%	65 & Older, 15.8%
18-54 yrs., 53.2%	

Median Household Income \$88,698

District Overview



Size in Sq. Mi. 0.3

Assessed Parcels/Blocks 148 parcels

*Pierre Smit was the Executive Director at the time this report was authored. However, at the time this report was published, the Executive Director was Christian Martin.

Sources: CBD/BID Annual Reports and Executive Director Interviews; American Community Survey Neighborhood Profile, Oceanview Neighborhood, (2019). This demographics data is associated with ACS data and not the exact geography of the CBD/BID districts. A map with the ACS Neighborhoods can be viewed in the Appendix.

SOMA West

2019 Year Established	6/30/2034 Sunset Date
---------------------------------	---------------------------------

The SOMA West area is the largest geographic area covered by a CBD in San Francisco. Historically, the SOMA neighborhood was home to a great deal of industrial, production, and repair services and operations and evolved into a hub for the Filipino community and other unique San Francisco communities. Today, the neighborhood is home to a range of residents, small businesses, and large companies.

Staff

Executive Director	Christian Martin
Number of Board Members	18
Approximate Staff Count <i>(In-house and contracted)</i>	28
Committees	3

- Executive
- Neighborhood Identity
- Safety & Services

Finances

Assessment Submission	\$3,859,195.14
Management plan budget allocation:	
79.25%	Public Rights of Way
9.09%	Management and Operations
7.14%	Marketing, Streetscape Improvements, and Beautification Program
4.50%	Contingency and Reserves

Services Provided

- Cleaning and Maintenance
- Corridor Landscaping
- Destination Marketing
- Business Development
- Community Grants
- Advocacy

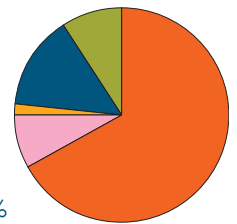
Area Demographics

Race/ethnicity

38.7%	Asian
29.8%	White
16.8%	Latino/Hispanic
8.7%	African American/Black
4.6%	Two or More Race
.7%	Other Race
.6%	Native Hawaiian/Pacific Islander
.1%	American Indian/Alaskan Native

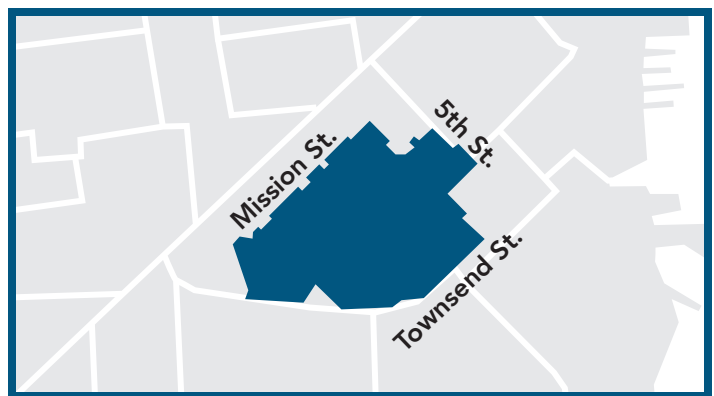
Age

0-4 yrs., 1.7%	55-64 yrs., 9.1%
Under 18, 8.3%	65 & Older, 14.5%
18-54 yrs., 68.2%	



Median Household Income — \$75,641

District Overview



Size in Sq. Mi. — 0.82

Assessed Parcels/Blocks — 2,738 parcels on 100 whole or partial blocks

Sources: CBD/BID Annual Reports and Executive Director Interviews; American Community Survey Neighborhood Profile, South of Market Neighborhood, (2019). This demographics data is associated with ACS data and not the exact geography of the CBD/BID districts. A map with the ACS Neighborhoods can be viewed in the Appendix.

Tenderloin

2005 **2019** **6/30/2034**
Year Established **Year Renewed** **Sunset Date**

The Tenderloin is a densely populated area immediately adjacent to Market Street. The neighborhood has one of the highest concentrations of children and seniors in the city. There is also a robust inventory of permanently affordable housing. In recent years, a great deal of investment has been made into the neighborhood's parks so that these populations in particular have access to safe and vibrant spaces. The CBD plays a critical role in ensuring these parks and other open spaces are cared for on a regular basis.

Staff

Executive Director	—————	Kate Robinson*
Number of Board Members	—————	16
Approximate Staff Count	—————	42
<i>(In-house and contracted)</i>		
Committees	—————	7
• Executive		• Inviting Space
• Clean		• Neighborhood Pride
• Economic Opportunity		• Safe
• Evaluation		

Finances

Assessment Submission	—————	\$2,043,877.62
Management plan budget allocation:		
66.77%	Clean and Safe	
15.55%	Marketing and Economic Development	
15.21%	Administration	

Services Provided

- Cleaning and Maintenance
- Block Safety Groups
- Greening and Public Space Activation
- Marketing and District Branding

*Simon Bertrang was the Executive Director at the time this report was authored. However, at the time this report was published, the Executive Director was Kate Robinson.

Sources: CBD/BID Annual Reports and Executive Director Interviews; American Community Survey Neighborhood Profile, Tenderloin Neighborhood, (2019). This demographics data is associated with ACS data and not the exact geography of the CBD/BID districts. A map with the ACS Neighborhoods can be viewed in the Appendix.

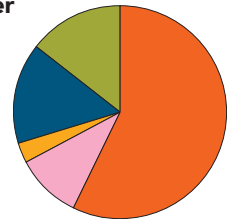
Area Demographics

Race/ethnicity

31.8%	White
28.9%	Asian
24.1%	Latino/Hispanic
9.4%	African American/Black
3.9%	Two or More Race
1.2%	American Indian/Alaskan Native
.4%	Native Hawaiian/Pacific Islander
.4%	Other Race

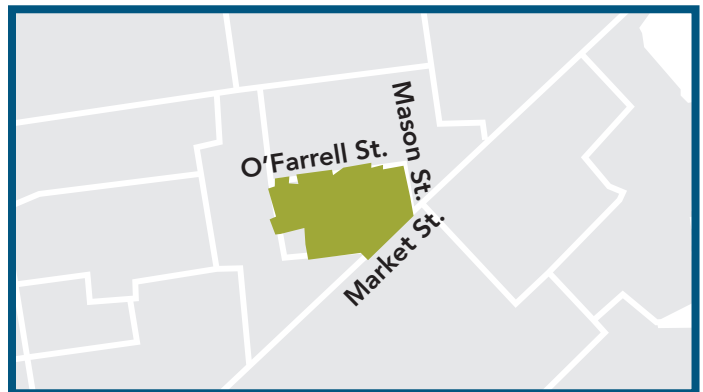
Age

■ 0-4 yrs., 3.2%	■ 55-64 yrs., 14.9%
■ Under 18, 10.3%	■ 65 & Older, 15.7%
■ 18-54 yrs., 59.1%	



Median Household Income ——— **\$35,654**

District Overview



Size in Sq. Mi. ——— **0.28**

Assessed Parcels/Blocks ——— **800 parcels on 41 whole or partial blocks**

Union Square Alliance

1999	2019	6/30/2029
Year Established	Year Renewed	Sunset Date

Union Square is the most significant retail destination in San Francisco. Major stakeholders for the Union Square Alliance include small, local businesses and international retailers. The area is a sought out destination for tourists and regional visitors during special events and the holiday season. Top destinations within the Union Square area include Union Square itself, the district’s central park, as well as the cable car stops.

Staff

Executive Director	Marisa Rodriguez
Number of Board Members	29
Approximate Staff Count	50
<i>(In-house and contracted)</i>	
Committees	7
<ul style="list-style-type: none"> Executive Marketing Public Affairs Streetscapes and Public Realm 	<ul style="list-style-type: none"> Services and Public Safety Finance and Audit Retail Theft Prevention

Finances

Assessment Submission	\$6,019,719.24
Management plan budget allocation:	
74%	Clean and Safe
14%	Management and Admin.
12%	Marketing Events and Advocacy

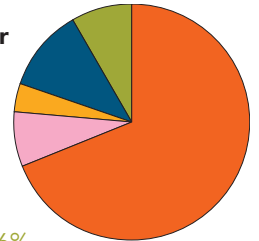
Services Provided

- Cleaning and Sidewalk Maintenance
- Public Safety (10B Officer Program)
- Community Relations (Ambassador Program)
- Destination Marketing and Events
- Advocacy
- Public Realm Beautification and Activations

Area Demographics

Race/ethnicity

44.2%	White
40.9%	Asian
7.1%	Latino/Hispanic
4.3%	Two or More Race
.4%	Native Hawaiian/Pacific Islander
.2%	Other Race

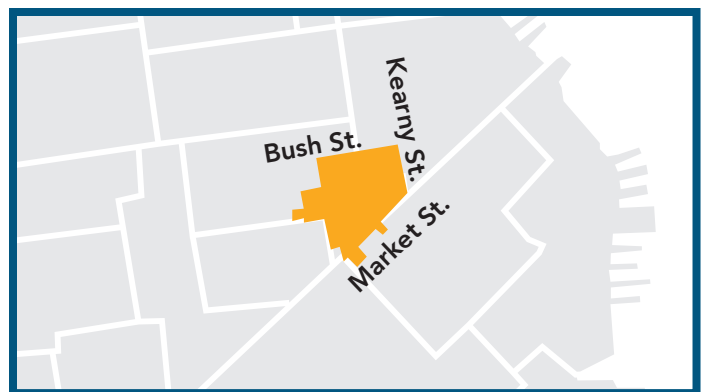


Age

0-4 yrs., 4.1%	55-64 yrs., 8.6%
Under 18, 7.6%	65 & Older, 11.8%
18-54 yrs., 72.0%	

Median Household Income — **\$183,787**

District Overview



Size in Sq. Mi. — **0.23**

Assessed Parcels/Blocks — **620 parcels on 27 whole or partial blocks**

Sources: CBD/BID Annual Reports and Executive Director Interviews; American Community Survey Neighborhood Profile, Financial District Neighborhood, (2019). This demographics data is associated with ACS data and not the exact geography of the CBD/BID districts. A map with the ACS Neighborhoods can be viewed in the Appendix.

Yerba Buena



2008	2015	6/30/2030
Year Established	Year Renewed	Sunset Date

Yerba Buena is home to a number of cultural institutions, including the Contemporary Jewish Museum, SFMOMA, Yerba Buena Center for the Arts, and the newly opened Mexican Museum. At the center of the Yerba Buena CBD are the Yerba Buena gardens, an outdoor open space enjoyed by workers and visitors in the area. The CBD has focused resources on supporting nonprofits in the district for several years, helping smaller organizations achieve their work alongside the larger institutions in the area.

Staff

- Executive Director** ————— **Scott Rowitz**
- Number of Board Members** ————— **22**
- Approximate Staff Count** ————— **32.4**
(In-house and contracted)
- Committees** ————— **9**
 - Executive
 - Services
 - Audit
 - Small Business Support
 - Community Benefit Fund
 - Streets and Public Space
 - Finance
 - Marketing
 - Nominating

Finances

- Assessment Submission** ————— **\$3,151,268.96**
- Management plan budget allocation:**
- 40.7%** **Cleaning and Streetscape Improvement Activity Costs**
- 32.5%** **Safety and Security Activity Costs**
- 13.8%** **Branding, Activation, and Marketing Activity Costs**
- 13.0%** **Management and Operations**

Services Provided

- Clean Team
- Public Realm Improvements
- SFPD Bike Officer
- Marketing and Events
- Community Guides
- Community Benefit Fund
- Social Services Specialist

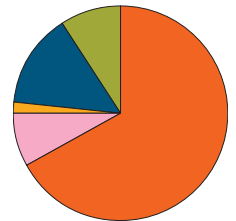
*Cathy Maupin was the Executive Director at the time this report was authored. However, at the time this report was published, the Executive Director was Scott Rowitz.

Sources: CBD/BID Annual Reports and Executive Director Interviews; American Community Survey Neighborhood Profile, South of Market Neighborhood, (2019). This demographics data is associated with ACS data and not the exact geography of the CBD/BID districts. A map with the ACS Neighborhoods can be viewed in the Appendix.

Area Demographics

Race/ethnicity

- 38.7%** **Asian**
- 29.8%** **White**
- 16.8%** **Latino/Hispanic**
- 8.7%** **African American/Black**
- 4.6%** **Two or More Race**
- .7%** **Other Race**
- .6%** **Native Hawaiian/Pacific Islander**
- .1%** **American Indian/Alaskan Native**

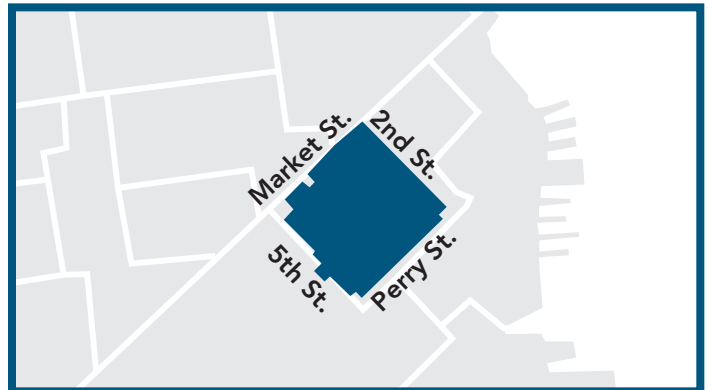


Age

- 0-4 yrs., **1.7%**
- 55-64 yrs., **9.1%**
- Under 18, **8.3%**
- 65 & Older, **14.5%**
- 18-54 yrs., **68.2%**

Median Household Income ————— **\$75,641**

District Overview



Size in Sq. Mi. ————— **0.43**

Assessed Parcels/Blocks ————— **17 whole or partial blocks**

CBD /BIDs Performance Analysis

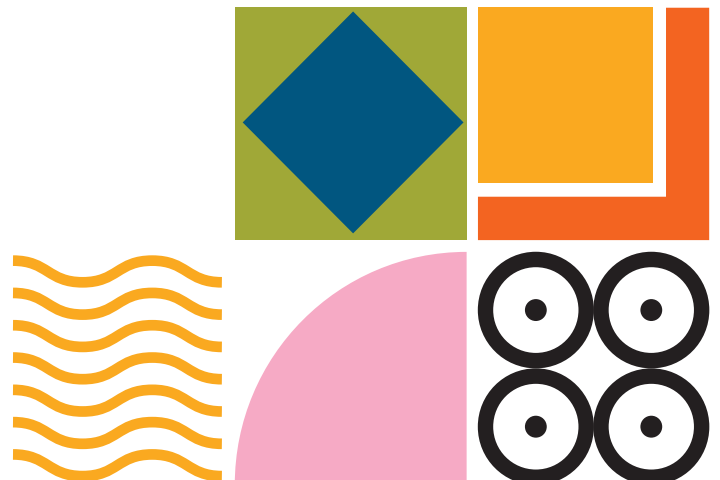


Overview of the Performance Analysis



Assessing the performance of CBD/BIDs, individually and overall, requires thoughtful consideration of the unique neighborhoods each organization serves and how services may look different or be tailored to the needs of their stakeholders. Each of these Performance Analysis sections are shaped around a concentration of CBD/BID services and their intended impact on the areas they serve. For example, keeping the public realm physically clean and accessible (Cleaning and Public Realm), contributing to the economic vitality of a neighborhood (Economic Development), and celebrating the identity, and people, of a place (Placemaking and Public Art) (Prentice and Porter, 2014). Each section attempts to speak about the areas of overlap between CBD/BIDs and how and why some CBD/BIDs may abstain from certain work completely.

The terms used to define the services provided by CBD/BIDs are often open to interpretation, which is why this report offers a glossary for the Performance Analysis which can be found in the report's Appendix. The work of CBD/BIDs shapes San Francisco as a city, different areas of the city, and unique neighborhoods. Accounting for these manifestations of impact requires varying analytical frameworks and data sources.



Analytical Frameworks

Each Performance Analysis section contains a combination of analytical frameworks in order to suit the goal of the section and achieve relevant data-based storytelling.

Individual CBD/BID Performance

Looking at the isolated, individual accomplishments of a single place management organization allows their data to be interpreted in the context of their neighborhood. When individual CBD/BID performance data is presented in this report, the intention is not to compare one CBD/BID to another unless the information is prefaced with a disclaimer explaining how variations in budget or geographic size are controlled for. Rather, pulling out the data for one singular entity is meant to provide an explanation of a place management organization’s work in situ.

Comparing Similar Budgets and Locations: Greater Downtown CBD/BIDs and Neighborhood CBD/BIDs Performance

There are two overarching distinctions between two subgroups of San Francisco’s CBD/BIDs. Utilizing these two subgroups in the report allows for controlled side-by-side comparisons.

The first distinction is budget size, and in turn, their number of staff and capacity for services. There are six organizations with anticipated yearly assessment revenue budgeted below \$1 million (ranging from \$248,000 to \$900,000 with an average budget of \$555,000) and nine organizations with anticipated yearly assessment revenue budgeted above \$1 million (ranging from \$1.2 million to \$6 million with an average budget of \$3.3 million).⁵

The second distinction is location. Areas in San Francisco that have CBD/BIDs include the Greater Downtown areas and Neighborhood areas. Greater Downtown refers to the part of the city with a dense concentration of office and retail spaces, transit hubs, and daily visitors to the city. These areas have residential populations but residential use is not the dominant land use in the area. The other areas where CBD/BIDs are sited include neighborhood corridors, which are typically Main Streets surrounded by residential properties. These areas are mostly home to retail uses and some office space.

When the budget difference (over or under \$1 million) and location difference (Greater Downtown or Neighborhood) are combined, the organizations neatly fall into two categories. These two categories are referred to in this report as “Greater Downtown CBD/BIDs” and “Neighborhood CBD/BIDs.” All Neighborhood CBD/BID’s have budgets under \$1 million, and all Greater Downtown CBD/BIDs have budgets over \$1 million.

Greater Downtown CBD/BIDs

<ul style="list-style-type: none"> Civic Center CBD Downtown CBD East Cut CBD Fisherman’s Wharf CBD Mid-Market CBD 	<ul style="list-style-type: none"> SOMA West CBD Tenderloin CBD Union Square Alliance CBD Yerba Buena CBD
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Neighborhood CBD/BIDs

<ul style="list-style-type: none"> Castro CBD Discover Polk CBD Japantown CBD 	<ul style="list-style-type: none"> Lower Polk CBD Noe Valley CBD Ocean Avenue CBD
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⁵A table with all of the San Francisco CBD/BIDs’ budgets is located in the Appendix.

CBD/BID Program Performance

Data that is available at the program level, or data that speaks to all organizations collectively, is utilized in each section of the report to speak to the efficacy of the CBD/BID program. This information is often presented against citywide trends or other areas of the city that do not have CBD/BIDs. While this aggregated data does not offer the same level of consideration to the unique neighborhoods, budget, or program area, the data does speak to the magnitude of impact CBD/BIDs have in the city overall as well as the specific challenges that these neighborhoods face in comparison to citywide averages or trends.

San Francisco and National Case Studies

The purpose of Case Studies is to situate programmatic findings in San Francisco in a larger context. The San Francisco Case Studies include a standout example or solution pursued by CBD/BIDs in San Francisco when faced with a challenge that most or all CBD/BIDs encounter in the city. The National Case Studies represent an example of a program, partnership, or strategy that a CBD/BID elsewhere in North America pursued when faced with challenges that San Francisco CBD/BIDs face. These North American examples are not intended to necessarily embody all of the unique characteristics of San Francisco and its CBD/BID program, however, these examples aim to provide greater context and perspective on an issue that is felt or relevant to San Francisco CBD/BIDs. In some cases, the National Case Studies embody an aspirational achievement that San Francisco CBD/BIDs may be able to learn from. In all, the Case Studies provide local and national context for the San Francisco CBD/BID program.



Assessed Data

In each of the Performance Analysis sections, primary and secondary data was retrieved from numerous sources in an effort to supplement and situate the data available directly from CBD/BIDs. Notably, the time frame for all data collected goes as far back as 2016 and up to 2021. This timeframe was determined for data analysis as this period includes all recently formed CBD/BIDs and several years of pre-pandemic analysis (2016 through 2019).

Government Agencies - Local and National

Data featured in this report from City and County San Francisco agencies include 311, the Office of Economic and Workforce Development, San Francisco Public Works, San Francisco Police Department, and San Francisco Municipal Transportation Authority. There is also mention of Vision Zero data and the 2017 Vision Zero High Injury Network. The 2017 Vision Zero High Injury Network is derived from 2013-2015 severe and fatal injury data from Zuckerberg San Francisco General (ZSFG), San Francisco Police Department/Crossroads Software Traffic Collision Database (SFPD), the Office of the Medical Examiner (OME), and Emergency Medical Services agencies.

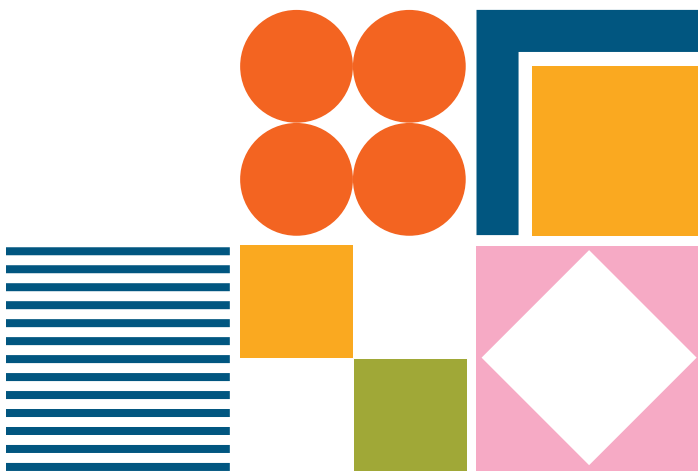
In addition to local data, demographic data in this report was retrieved from the U.S. Census Bureau's American Community Survey (ACS).

CBD/BID Performance Data

Urban Place Consulting worked directly with each individual CBD/BID to retrieve information from the organization about their last four to five years of operation, or since fiscal year 2016-2017. Or in some cases, the work that has been accomplished since the time the CBD/BID was formed. This data was retrieved from the organizations through interviews with the Executive Directors, review of the organization’s public Annual Reports or other published reports, special data requests to individual CBD/BID staff, and review of public memorandums submitted to the Board of Supervisors by the Office of Economic and Workforce Development that detail work accomplished by CBD/BIDs per calendar year. One note on fiscal years: Fiscal Year (FY) refers to July 1 through June 30 for all CBD/BIDs except for Civic Center and Mid Market CBDs whose fiscal years align with the calendar year. As such, their data has been augmented to the best of the ability of the report authors to align with the other organizations’ fiscal year reporting.

CBD/BID Leadership and Staff Survey

Urban Place Consulting with support from the International Downtown Association authored and distributed a survey for the staff and leadership of San Francisco CBD/BIDs. The survey requested responses from these individuals about their perceptions of program-specific performance, the impact of COVID-19, the success or challenges of City partnerships, and other general feedback about the efficacy of the CBD/BID they represent.



Constituent Interviews

Community members - including residents, small businesses, and other stakeholders - participated in interviews with Urban Place Consulting where they were asked to share perspective and feedback on the impact the CBD/BID in the neighborhood has had on their lives. These interviews were made possible through direct referrals to individuals provided by the CBD/BIDs.

Additional Sources

Information regarding visitor trends to the CBD/BID neighborhoods was retrieved through the Placer AI platform which uses anonymized cell phone data to quantify unique visitors in neighborhoods and cities.

Real estate information featured in the report was retrieved from CoStar, a commercial real estate information company. While this data is used in the report to speak to the conditions of each unique neighborhood with a CBD/BID as well as citywide trends, gathering timely, 100% accurate information at the neighborhood-level is very difficult and leaves rooms for errors. This data is presented in the report with this caveat.



Cleaning & Safety

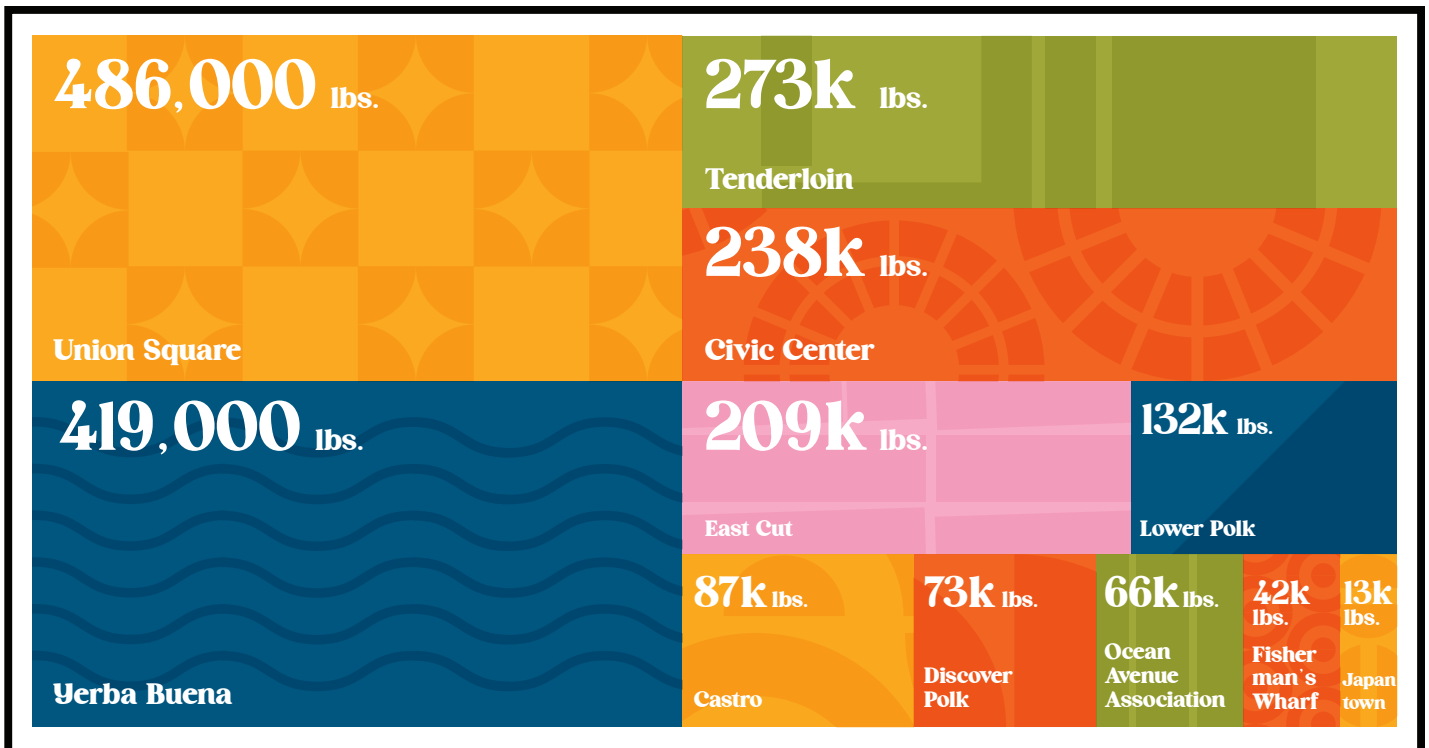
Key takeaway:
Over \$23 million - or 70% of reported CBD/BID Assessment Revenue - went towards Safe & Clean efforts in 2021.

Cleaning services and services to ensure safe navigability in the public right-of-way are the backbone of the CBD/BID program. In 2020-2021, CBD/BIDs report the budgeted amount of Assessment Revenue for Cleaning and Safety services was 70.2% for the CBD/BID program overall, equivalent to \$23,047,011. There is certainly justification for this investment based on constituent sentiments tracked by the City and County of San Francisco in the City Survey and the ever-growing 311 calls for cleaning services. However, several analyses in this section reveal that some CBD/BIDs may be underfunded, and the role that consistent data tracking for both clean and safe efforts and a practice of CBD/BIDs sharing outcomes with one another could optimize existing resources available.



Image sourced from Union Square CBD/BID online platforms

Pounds (lbs.) of Litter Collected in 2019–2020



Data for 2020-2021 and 2021-2022 was not comprehensively available at the time this report was composed. 2019-2020 litter data was not available for the following organizations: Downtown CBD (services not in place yet), Mid-Market CBD (data not published), Noe Valley CBD (data available but not by pound), and SOMA West CBD (services not yet in place).

Source: CBD/BID 2019-2020 Annual Reports

The City and County of San Francisco surveys its residents every two years to learn how constituents utilize and perceive city services. The most recent study, named the City Survey, is from 2019. In the 2019 survey, constituents were asked about their perception of sidewalk cleanliness and public safety. The score for sidewalk cleanliness was a C+, and 57% of respondents felt sidewalk cleanliness had gotten worse since 2017. When looking at sidewalk cleanliness scores by San Francisco Supervisor Districts, every district with a CBD/BID had a decline in "A" or "B" scores between 12 to 15 percentage-points. Responses to the question about public safety were similar. 45% of respondents indicated that they believe public safety has gotten worse since 2017 (City and County of San Francisco, 2019).

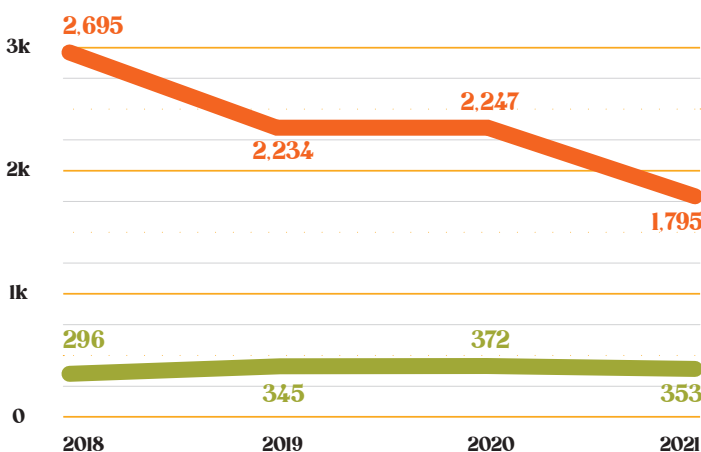
The 311 Department aims to connect residents, businesses, and visitors to Customer Service Representatives ready to help with general government information. Of the 311 public right-of-way cleaning and maintenance requests placed over the last five years, on average, 14% are placed within the boundaries of a CBD/BID (311, 2022). This ratio of calls is proportional to the commercial area covered by the services of a CBD/BID (~20%) in San Francisco. CBD/BID districts include 8% of San Francisco's land area, yet 14% of 311 requests for cleaning and maintenance services are placed within CBD/BID districts. There has been a 34% increase in 311 calls since 2017 or since the time a CBD/BID was established.

Influenced by these realities, common practices across all of the San Francisco CBD/BIDs have more or less been established. These include litter removal, power

washing of sidewalks and streets, graffiti (including stickers) removal, and unique cleaning partnerships to address neighborhood-specific challenges, such as the deployment of Big Belly trash cans and one-off community deep clean events. Landscaping services are not necessarily a common service for San Francisco CBD/BIDs as the need for supplemental landscaping in a neighborhood depends on the type of green spaces the CBD/BID is expected to maintain, such as flower baskets or planters, parklets, or privately owned public spaces. CBD/BIDs that do not provide landscaping services because other agencies are tasked with those duties include Japantown CBD, Downtown CBD, Discover Polk CBD, Fisherman's Wharf CBD, and Tenderloin CBD.

Leading up to the COVID-19 pandemic, the CBD/BIDs were collecting an increasing number of litter in the neighborhoods they serve. Between fiscal years 2016-2017 and 2019-2020, CBD/BIDs report that 8 million pounds of litter were removed from the streets and sidewalks of San Francisco by CBD/BID staff. In 2020, there was a slight decrease in litter removal, and the data for 2021 was not available at the time of this report's publication. The decrease can likely be attributed to a decline in pedestrian presence in CBD/BIDs, especially the Greater Downtown CBD/BIDs. As of 2021, power washing is conducted throughout the entirety of all CBD/BID districts (on a schedule or one-off basis), which is equivalent to four square miles per year receiving power washing services.

All of the CBD/BIDs indicated that they receive requests for Cleaning Services through formal channels and informal outreach, though not all of the CBD/BIDs track these requests for services.



Reported Street & Commercial Crimes in CBD/BIDs

- Crime incidents in Greater Downtown CBD/BIDs
- Crime incidents in Neighborhood CBDs

Source: San Francisco Police Department 2017-2021

Between fiscal years 2016-2017 and 2021-2022, there were at least 65,000 calls for cleaning services. The organizations that consistently track this metric and share the information publicly include Downtown CBD, East Cut CBD, Japantown CBD, and Yerba Buena CBD. The CBD/BIDs that track this metric and share it publicly on an occasional basis include Civic Center CBD, Fisherman’s Wharf CBD, Lower Polk CBD, Mid Market CBD, Tenderloin CBD, and the Union Square Alliance. All other organizations do not report on this metric in the Annual Reports and in their yearly reports to OEWD because they have not maintained records on a regular basis and/or the volume is so low that they do not formally record the request.

Public safety services vary in form and function as each CBD/BID approaches matters of safety differently, meeting the needs of their community with unique solutions and collaborations with the San Francisco Police Department (SFPD). Not all CBD/BIDs explicitly address criminal behavior. All CBD/BIDs except for Discover Polk, Noe Valley, and Ocean Avenue indicate that their work addresses public safety. Of those, the following directly or indirectly support efforts to hire security staff or off-duty (aka: 10b) officers to patrol the district: Castro CBD (via



Image sourced from Noe Valley CBD/BID online platforms

“
There was a time where the FiDi was filthy and it seemed hopeless. The installation of the new trash bins, combined with the cleaning teams down to the cigarette ash trays that have been installed on street poles has made a huge difference.”
 — **Adam Ryon**

Director of Sales for The Merchants Exchange. Downtown CBD Stakeholder

Castro Cares contract, 10b officers), Civic Center (contracted community ambassadors), East Cut CBD (security contract), Fisherman’s Wharf (private security and SFPD 10b officers), Mid Market (contracted safety personnel), Union Square (SFPD 10b officers and Private Security), and Yerba Buena (SFPD 10b officer partnering with community ambassadors).

The SFPD-reported crime statistics analyzed for this report only include the types of crime incidents that relate to CBD/BID efforts as they occur in the public right-of-way and/or impact ground-level businesses or building entrances (i.e., Burglary, Disorderly Conduct, Robbery, Public Indecency). From 2018 to 2021, these specific crimes have declined by 17% at the citywide level. However, the same crimes only declined by 3% in CBD/BID districts over the same time period (SFPD, 2022). When comparing the crime rate in Greater Downtown CBDs versus Neighborhood CBDs over the same time period, there are greatly differing trends. Burglary, Disorderly Conduct, Robbery, and Public Indecency crimes declined in Greater Downtown CBDs (-19%) and increased in Neighborhood CBDs (+33%). What is important to note here is that the rate of crime in Neighborhood CBDs has historically been low, so the shift that occurred between 2018 and 2021 does not necessarily mean that Neighborhood CBDs are more crime-ridden than Greater Downtown CBDs (see Reported Street and Pedestrian Crimes in CBD/

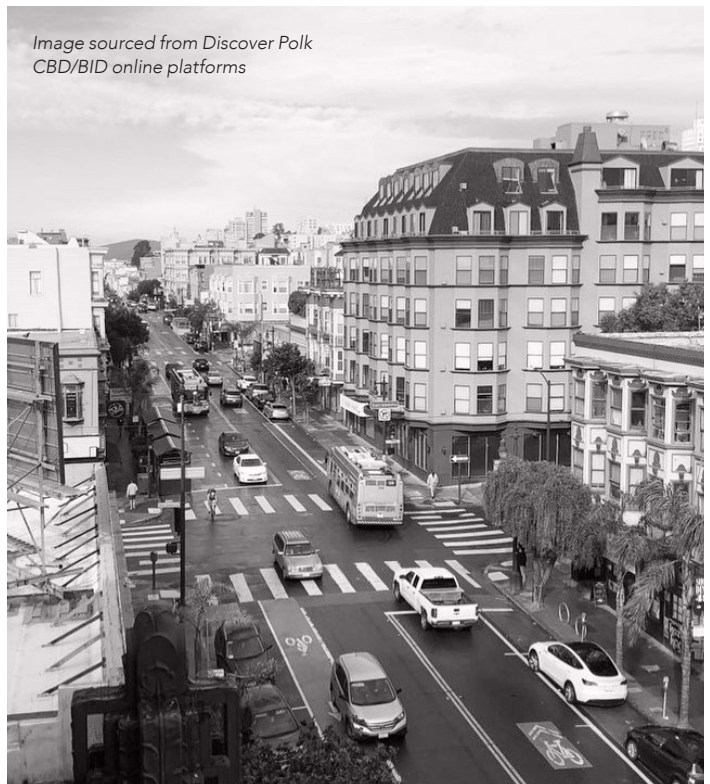
BIDs chart). These statistics merely indicate the type of change that occurred in the two areas, and how drastic that change appears to be according to SFPD data.

Collection of data relating to the public safety work for these districts varies by CBD/BID and by year. Over the last five years, there were at least 285,496 documented instances when CBD/BID Community Ambassadors or other staff addressed an issue that impacted shared use of the public right-of-way. By organization, these figures include Castro - 13,738 (2016-2021), Civic Center - 12,716 (excluding 2018-2021), Downtown - 1803 (2021 only), Fisherman's Wharf - 32,449, Mid Market - 1,559 (excluding 2018-2021), Union Square - 166,309 (not including 2017-18), Yerba Buena - 56,922 (2016-2021).

Pedestrian safety and transit improvement work is a focus for several CBD/BIDs. Approximately 28% of the Vision Zero High Injury Network is located in a CBD/BID as approximately 45% of CBD/BID streets are on the Vision Zero High Injury Network (San Francisco Department of Public Health, 2017). Over the last four years, an average of 23% of all reported traffic injuries in San Francisco occurred within the boundaries of a CBD/BID. Based on CBD/BID reported activity, this study finds that CBD/BIDs are involved in 13 SFMTA pedestrian safety and streetscape improvement projects per year and advocate for 11 pedestrian safety initiatives per year, on average.

Several of the CBD/BID organizations conduct surveys requesting feedback from constituents on

CBD/BID districts include 8% of San Francisco's land area, yet 14% of 311 requests for cleaning and maintenance services are placed within CBD/BID districts.



how cleaning and safety services are and are not addressing major concerns. Models for this outreach include East Cut CBD, Yerba Buena CBD, SOMA West, and the Tenderloin CBD, all of which have conducted surveys in the last two years via their website or email to constituents. How this feedback is applied varies from one organization to another, however, a specific example was provided by Yerba Buena CBD as part of the interview process for this report. Based on the findings from a safety survey they conducted in 2020, the organization reduced the number of safety team members deployed in the district and enhanced the number of cleaning staff. This decision was due to feedback from community members who expressed that cleaning services were more essential than safety services in their neighborhood. The result was an increase in cleaning effectiveness.

As perceptions of clean sidewalks and public safety continue to worsen in San Francisco, according to the City Survey findings and unyielding demand tracked by 311 calls, thoughtful and regular analysis of cleaning and safety services can continue to lead to more impactful results. CBD/BIDs demonstrate varied methods for assessing the impact of this work. OEWD has attempted to streamline reported information required by CBD/BIDs through their annual report benchmarks and memos they are mandated to share

with the San Francisco Board of Supervisors. Through this effort, there has been success with the consistent tracking of litter removed, blocks power-washed, and graffiti/stickers removed by all CBD/BIDs. CBD/BIDs struggle to comply with consistent reporting around the effectiveness of Community Ambassadors and/or security functions. This inconsistent reporting is likely due to the fact that this work is difficult to quantify. Each neighborhood faces unique challenges, and the CBD/BID place management organizations have had to adapt and innovate their services to meet demand. When the information has been reported, the catch-all term “quality of life” instances is used to sum up the interactions of Community Ambassadors and other CBD/BID staff. This term does not accurately or appropriately capture the work of these individuals, which requires boots-on-the-ground staff to engage with any and all community stakeholder and neighborhood visitors in positive and challenging capacities. Documenting the work of Community Ambassadors could resemble the tracking of cleaning services, where the expected interactions with individuals are defined and tracked, such as “wayfinding,” “de-escalation,” “social service referral,” and so on. This would allow for greater insight into the type of impact and outcomes this investment has in the neighborhood.

Related to this difference in data tracking practices, one notable observation from the data provided by CBD/BIDs with similar budgets is the varying ratio of cleaning providers and safety team members (i.e., Community Ambassadors and/or security guards). Based on interviews with the Executive Directors and review of Annual Reports, clean and safe staffing decisions are made by the organization’s leadership with a guiding framework from the CBD/BID management plan. The leadership’s goal is to address the neighborhood’s specific clean and safe needs, meaning staffing may look different from one CBD/BID to the next. However, while cleaning data is mostly consistently tracked, data around Community Ambassadors and safety services remains hazy. Without clearer safety data, certain staffing configurations may not be wholly optimized for the CBD/BID clean and safe needs.

For example, there are two CBD/BIDs - CBD/BID #1 and CBD/BID #2 - with nearly identical assessment revenue committed to clean and safe services for their



The sheer presence of people who are working for Yerba Buena on the streets and constant cleaning makes it more desirable to visit and or move into the area.”

— Valen West

**Owner and Operator of Flytrap Restaurant,
YBCBD Stakeholder**



*Image sourced from Yerba Buena
CBD/BID online platforms*

district. These two CBD/BIDs also share a border with one another and experience similar public realm challenges. Yet, CBD/BID #1 and CBD/BID #2 spend their funds and tackle their clean and safe work with entirely different strategies. When you control for slight differences in their physical area of coverage, CBD #1 has twice as many cleaning staff members than CBD #2, and CBD #2 has twice as many safety staff than CBD #1. Using the same control for physical area of coverage, the data reveals that in 2019-2020, CBD #1 picked up 25% more litter than CBD #2 in one year. CBD #2 may have positive safety outcomes from their high number of safety team members, but there is no publicly available data to explain the benefit of this staffing arrangement. Without guidelines around tracking safety services, well-intentioned, localized strategies are left with few tools to assess effectiveness.

Another analysis of CBD/BID clean and safe services revealed that CBD/BIDs have very different assessment funds available to cover clean and safe services in relation to the area of CBD/BID coverage. This may explain why service delivery looks different in one CBD/BID to the next, even when the conditions of the streets and sidewalks are similar and the same percentage of their assessment revenue is allocated to clean and safe services.

CBD/BIDs in San Francisco are all smaller than one square mile, so one way to speak about their land area is to refer to square feet. Relating the square feet

Clean & Safe Demand
 $\# \text{ of Yearly Visitors} \div \text{CBD/BID Area Square Feet}$

vs.

Clean & Safe Investment

$\$ \text{ Budgeted for Clean and Safe} \div \text{CBD/BID Area Square Feet}$

Comparing each CBD/BID clean and safe demand versus resources puts each place management's strategy into citywide context. Visitors refers to all who spend time in the area in one year: Residents, Employees, and non-Resident / non-Employee visitors



of a district to their clean and safe budget enables a figure that tells us how much money goes towards clean and safe per square foot per fiscal year. The amount of investment per square foot per year ranged greatly amongst the CBD/BIDs. For every square foot, a range of \$.11 to \$.69 is spent annually in Greater Downtown CBD/BIDs, and for Neighborhood CBD/BIDs, that investment ranges from \$.02 to \$.19.

Of course, the number of people that visit the CBD/BIDs varies, which can and should lead to assessment revenue configurations that increase funding for clean and safe services per square foot. More pedestrian traffic can lead to more litter, safety needs and challenges, and general use and wear to the district's public realm. Using anonymized cellular data, this pedestrian traffic in a CBD/BID can be calculated for one fiscal year.⁶ When the number of visits per square foot per year in a CBD/BID are compared with the investment in clean and safe per person per year, a ratio can be extracted that explains how many dollars to visitors are invested per year. For an even more accurate representation of this investment, this formula could be adjusted to reflect building footprints that do not receive CBD/BID services or include frontages a CBD/BID is not responsible for.

This comparison highlights how some CBD/BIDs are well-resourced for their pedestrian traffic, and how other CBD/BIDs have significantly less funding for their pedestrian volume. For example, there are two CBD/BIDs that share a border and have similar cleanliness and safety challenges. Each has about one visit per square foot per year. However, according to their management plan budget and their most

recently reported assessment revenue, one CBD/BID invests 33% more per square foot than the other CBD/BID. Like this example shows, not all CBD/BIDs have the same money available to keep up with cleaning and services. Moreover, this example illuminates how there are many CBD/BIDs that lack the funding needed in order for their services to be fairly compared with other CBD/BIDs.

If CBD/BIDs are expected to deliver similar results across the city of San Francisco and are held to similar standards by the constituents and the City, calculating adequate and consistent clean and safe investments with assessment dollars, especially with consideration of pedestrian volume and staffing configurations, could become a practice of the CBD/BIDs with support from the City. Analyses similar to the examples featured here could be used to lay out a data-based case that some CBD/BIDs are truly under-resourced compared to their peers.

CBD/BID services supplement baseline City services. Yet, even with special benefit services from CBD/BIDs, cleanliness and public safety remain a top challenge for San Francisco. As neighborhood-based organizations, CBD/BIDs are tasked with responding to the stakeholders of their community and problem solving for unique challenges. CBD/BIDs are well situated for collaborations with citywide agencies that struggle to grasp the specific needs of every San Francisco neighborhood. When surveyed, CBD/BIDs indicated that there have been around 100 unique cleaning partnerships (i.e., program or project with San Francisco Public Works or a private cleaning entity that extends beyond the standard cleaning services provided by the CBD/BID) and 90 unique safety partnerships with the City (i.e., program or project with SFPD or another City agency that extends beyond the standard cleaning services provided by the CBD/BID) since 2017. CBD/BID Leadership and Staff Survey respondents indicate a generally positive working relationship with Public Works, SFPD, and OEWD who oversee grants for CBD/BIDs that fund clean and safe work, and several comments from the survey indicate that these relationships are slowly improving and have room for even greater collaboration.

Looking ahead, there are key opportunities for enhancing performance review and increasing partnerships. CBD/BIDs could conduct their own

Takeaways

- Cleaning and safety services must be rigorously tracked by the CBD/BIDs and evaluated.
- CBD/BIDs can share best practices with one another to optimize services and streamline data collection methodologies.
- ◆ Collaborations with City agencies allow for greater effectiveness of CBD/BID services and government services.

Clean and Safe Performance Audit on an annual basis, which would include an analysis of cleaning and safety services. This could look like an analysis of quantitative data month-over-month, looking to see if new strategies, staffing configuration, and other variables impact effectiveness. Regular and robust clean and safe surveys for the community served by the CBD/BID may also be illuminating and help prioritize cleaning needs. This could help individual organizations make data-driven decisions around staffing and requests for funding. Sharing program performance assessments and lessons learned can lead to increased effectiveness of staffing decisions and help CBD/BIDs collectively demonstrate evidence-based need for supplementary funding or other resources to funding partners. Departments and teams within the City that are charged with matters of cleanliness and public safety stand to deepen their relationships with these hyper-local organizations and benefit from their neighborhood insights.



⁹Residential data was not included from the Placer analysis as the employee and visitor (e.g., non-employee, tourist, etc.) data did not wholly align with the available census residential data.

Case Studies

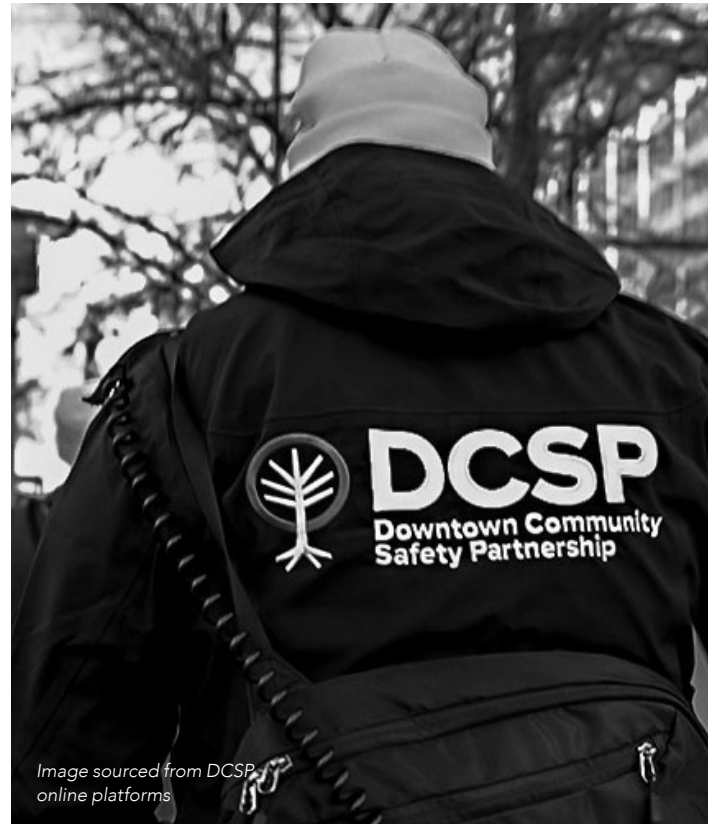
National Case Study: Reimagining Neighborhood Safety Solutions

Downtown Community Safety Partnership

Winnipeg, Manitoba

In Winnipeg, MB, a coalition established the nonprofit Downtown Community Safety Partnership (DCSP), to improve coordination and deployment of resources to support the downtown population. Founding and funding partners are Downtown Winnipeg BIZ, the provincial government, the City of Winnipeg, Winnipeg Police Service, Winnipeg Fire Paramedic Service, and True North Sports + Entertainment. Pillars of the DCSP include a continuum of cohesive 24/7 support and non-emergency response to those in the community in need of support and assistance; partnerships and collaboration; and prevention and outreach focused on long-term solutions. The DCSP fields three distinct teams on the street:

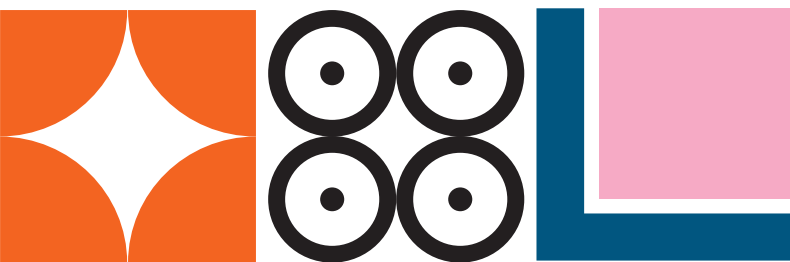
- 1 The CONNECT Team provides street presence, frontline assistance and referral to downtown services and amenities,
- 2 The Community Outreach Advocacy Resource Team (COAR) provides street presence and outreach and follow-up intervention and assistance. COAR works with partner agencies in housing, addictions treatment, education, mental health support, and other resources that aim to provide longer-term assistance, and
- 3 The Mobile Assist and Connect Team 24/7 provides street presence and outreach services, including social needs assessments. It engages other agencies and resources, including the COAR team, as needed in response to individual needs.



San Francisco Case Study: Downtown Streets Team

Tenderloin CBD, Civic Center CBD, Castro CBD, Union Square Alliance, East Cut CBD

At different points over the last five years, CBD/BIDs partnered with the non-profit organization Downtown Streets team to create work experience opportunities for their unhoused constituents while also enhancing their street cleaning services. Downtown Streets Team offers a work experience and counseling program for people experiencing homelessness, providing stipends as compensation for cleaning services and pro-bono case management. The program offers a model for work experience that honors individual's unique situations and helps them identify career paths that align with their goals. One notable accomplishment by a CBD: after East Cut CBD launched the program, the organization eventually hired on three former members of the Downtown Streets Team.



Economic Development

Key takeaway:

Before the COVID-19 pandemic, around 30%, or \$48 million, of the City's overall Sales Tax Revenue was generated in CBD/BID districts per year between 2017 and 2019. In 2020, that figure dropped to 16%, or \$26 million.

Core to the stakeholders' impetus to create a CBD/BID is economic impact. How economic development work is defined varies from one organization to the next. The very presence of cleaners, community ambassadors, and neighborhood promotion through visible marketing are all examples of efforts to draw people into a commercial corridor. Their consistent and lingering presence ideally will lead to patronage and occupied office and retail spaces.

According to the San Francisco CBD/BID Executive Directors, all organizations provide economic development services except for Civic Center CBD and Downtown CBD. The latter CBD is newly formed and is in the process of planning for economic development capacity. Only four organizations have an economic development allocation in their management plan budget, including the Discover Polk CBD, Japantown CBD, Mid Market CBD, and Tenderloin CBD. For several of the CBD/BIDs, their management plans refer to economic development services as part of the mission of the organization but do not explain the relationship of economic development services to the budget, or the economic development benefit of the organization is an indirect outcome of other services, such as street cleaning and neighborhood marketing. This makes quantifying the dollar investment into Economic Development work a bit challenging for this analysis.

CBD/BIDs provide a combination of services to impact the economic vitality of their district: Business Retention (i.e., services, outreach, and technical support to ensure that commercial tenants of all kinds are able to stay open and operating in their place of business), Property Value, Real Estate Development and Investment, Retail and Ground-floor Vacancies, and Small Business Support (e.g., technical support, loans, grants, or other types of staffing resources). Constituent interviews and learnings from the CBD/BID Leadership and Staff Survey revealed that the CBD/BIDs were seen and performed as ground-

zero resource hubs when the economic impact of COVID-19 transformed commercial corridors. As businesses attempted to navigate the resources available to them through government relief programs, CBD/BIDs adapted, and created, economic development services to provide clarification and assistance.

Specific examples of economic development services led by CBD/BIDs include:

- 1 Real Estate Development Review Process:** Union Square Alliance reviews and provides feedback to developers on proposed real estate projects.
- 2 Nonprofit Grantmaking:** Yerba Buena CBD awards grants to area nonprofits on a yearly basis.
- 3 Technical Assistance:** Japantown CBD provides technical assistance to small businesses with limited knowledge of government grant programs and/or language preferences that impact their ability to navigate a grant process, and the Mid Market CBD management plan outlines a staff position whose responsibility is to provide services to impact "business attraction, retention, and expansion, and technical assistance for business owners."



Image sourced from Civic Center CBD/BID online platforms

In 2017, the 12 CBD/BIDs in operation reported that they led at least 23 economic development services or initiatives. By mid-2020, that number doubled to 51. While three new CBD/BIDs were formed in that time, the growth in services and initiatives was not related to the addition of more CBD/BIDs. According to interviews with Executive Directors and analysis of the CBD/BID Annual Reports, this growth can be directly attributed to COVID-19, and this increase in initiatives looks the same for Greater Downtown CBDs and Neighborhood CBDs (each have around three economic initiatives per organization, by group). These initiatives included a range of services and support such as navigating outdoor dining permits, cash funding for struggling businesses, and distribution of critical information.

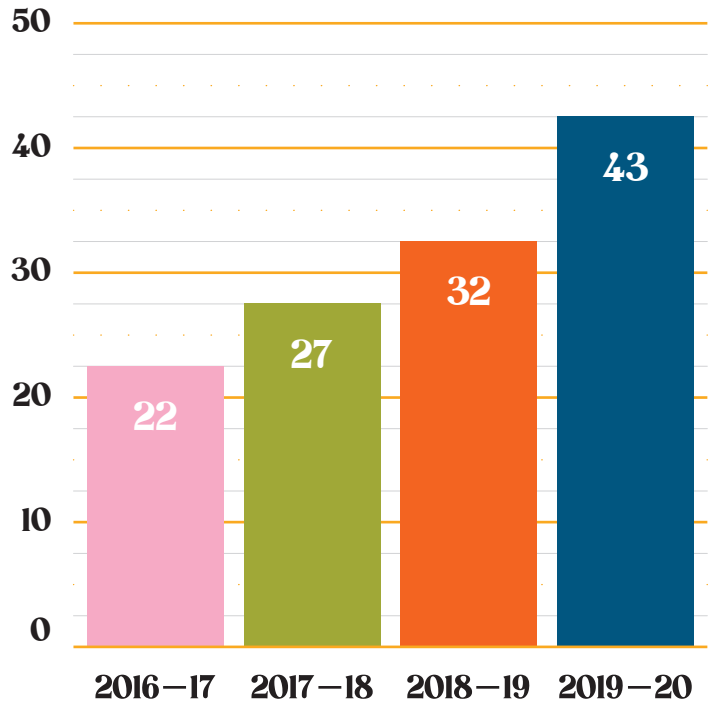
This growth in economic development initiatives required nimbleness, and for many organizations, this meant outside fundraising and organizing was essential because according to several Executive Directors and staff, their management plan's do not permit economic development work (i.e., staff effort and funding from assessment dollars cannot go towards this work, explicitly). On top of this, there was demand from the City and County of San Francisco, who looked to CBD/BIDs for assistance in distributing government resources and tools. A quote from an anonymous Executive Director provides an example of the perceived limits around the management plan restrictions and growing demand for CBD/BID services: "We have received some grant money from OEWD for vacancy reduction efforts. [However, the] CBD's management plan does not allow for assessment dollars to be spent in this area."

2021 Retail – Average Vacancy

Castro/Upper Market, 6.1%	Mid Market, 39.8%
Civic Center, 5.3%	Noe Valley, 1.0%
Discover Polk, 8.2%	Ocean Avenue, 1.7%
Downtown, 5.1%	SOMA West, 13.0%
East Cut, 5.3%	Tenderloin, 5.2%
Fisherman's Wharf, 21.4%	Union Square, 11.1%
Japantown, 3.0%	Yerba Buena, 4.2%
Lower Polk, 14.3%	

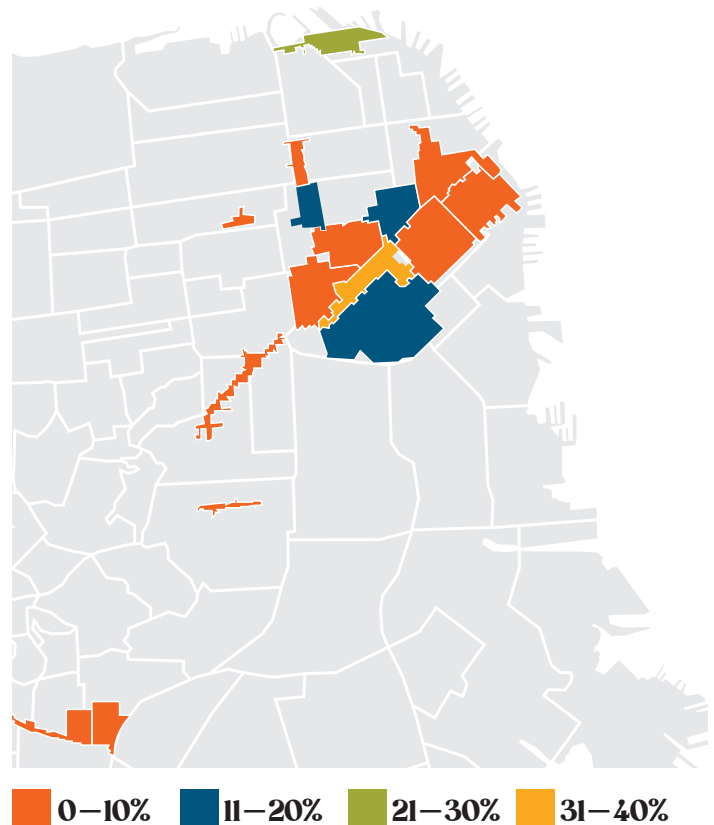
Source: CoStar Retail Vacancy Report, 2021

CBD/BID Economic Development Initiatives by Year



Data behind the chart: In the mid-2020, there were 43 unique economic development initiatives led by CBD/BIDs. This number has doubled since 2017 when there were 22 initiatives led by the 12 CBD/BIDs in operation.

Source: CBD/BID Executive Director Interviews



However, there seems to be a program-level misunderstanding about what a CBD/BID is allowed to tackle despite the details of a management plan. Even with restrictions around how assessment dollars may be spent in a CBD/BID management plan, outside funds can be managed and implemented by a CBD/BID regardless of what a management plan says. While the funding opportunities may not be consistently available, CBD/BID management plans do not entirely prevent them from pursuing economic development work. Perhaps this matter relates to the broader challenge of defining economic development which is not exactly straightforward. Nevertheless, organizations should not be missing out on opportunities to utilize external funding to benefit local businesses when that funding is available because of management plan misunderstandings.

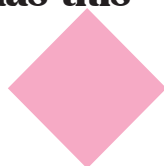
COVID-19 presented a challenge for San Francisco's commercial and retail tenancy, and the Greater Downtown CBD/BIDs and Neighborhood CBD/BIDs faced different economic realities. The 15 CBD/BIDs are home to 39% of San Francisco's total office inventory, and within this figure, the Greater Downtown districts represent 38% of San Francisco's office inventory (71,604,904 square feet, or 99% of all office space located within a CBD/BID). These



“I have been in hospitality here in SF for about 35 years, it was never more challenging than the last 3 years and continues to be so. I can't describe the things I would walk into on a daily basis in front of my shop and in the parklet, they really showed up when I was about to give up. I'm really grateful to be in a neighborhood that has this program.”

— Luc Torres

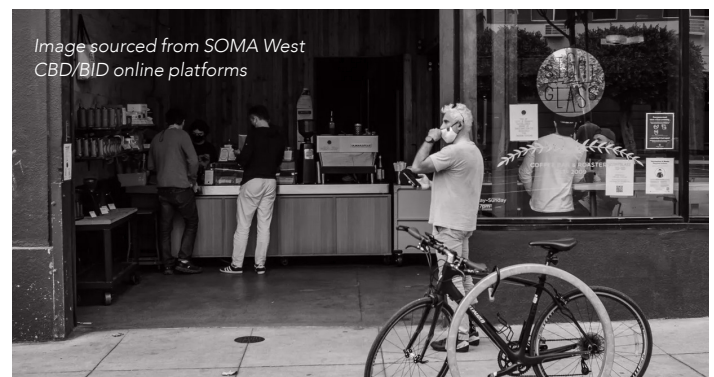
Owner of Robberbaron Wine Bar, Discover Polk CBD Stakeholder



CBD/BIDs cover virtually all of Greater Downtown San Francisco as well as recently redeveloped areas in the city where office is a predominant land use, such as SOMA, Mid Market, and East Cut. According to CoStar, the average office vacancy across San Francisco during 2021 was 13.6% (CoStar, 2022). In 2019, this figure was 6.1%. Compared to CBD/BIDs, the 2021 combined average vacancy rate was 14.4% (excluding Ocean Avenue). In 2019, the figure was 8% (excluding Discover Polk, Japantown, Noe Valley, and Ocean Avenue). In 2021, the Greater Downtown CBD/BIDs office vacancy average was 18%, up from 8.8% in 2019 (and 13.7% in 2020). This data demonstrates how CBD/BIDs in Greater Downtown San Francisco have faced steeper vacancy challenges before and after the pandemic than other parts of the city.

Retail vacancies tell a similar story. Overall, San Francisco had an average retail vacancy of 5.2% in 2021 and 3.4% in 2019. CBD/BIDs overall 9.65% average vacancy rate in 2021, and in 2019, this figure was 6.51%. However, Greater Downtown CBD/BIDs and Neighborhood CBD/BIDs had very different experiences. The data for the Greater Downtown CBD/BIDs shows average retail vacancy in 2021 was 12.27%. In 2019, this figure was 8.42%. For Neighborhood CBD/BIDs in 2021, this figure was 5.72%, and in 2019 the figure was 3.65%. Comparing 2019 figures with 2021 figures, San Francisco overall and Neighborhood CBD/BIDs saw nearly identical rates of vacancy, pre- and post-COVID-19. Yet, Downtown CBD/BIDs had a vacancy rate that is more than double those figures in 2019 and in 2021.

The reduction in visits by office workers in Greater Downtown CBD/BIDs is likely related to the loss in Sales Tax Revenue. According to anonymized cellular data, 48% of workers accounted for in 2018-2019 returned to the Greater Downtown CBD/BID in 2021-2022 (Placer, 2022). However, their visiting frequency (i.e., how often they go into the office) in 2021-2022



was down by 65% compared to the 2018-2019 visiting frequency, meaning the workers that are returning to the office do so on a much less regular basis. This rate of office visitor frequency is consistent with citywide trends. Before the COVID-19 pandemic, around 30% of the City's overall Sales Tax Revenue was generated in CBD/BID districts (City Performance Cards Sales Tax Collection, 2021). In 2020, that figure dropped to 16%. Most of this loss occurred in the Greater Downtown CBD/BIDs where there was a 57% decrease in Sales Tax Revenue in 2020 compared to the year before. The Neighborhood CBD/BIDs only saw a 29% decrease in Sales Tax Revenue in 2020 compared to 2019.

In spite of the pandemic, the value of these neighborhoods continues to grow at a rate higher than that of the citywide average. Between 2017 and 2021, property value increased year-over-year (Y-O-Y) at a higher rate on average (+15%) in CBD/BID neighborhoods than citywide property value's Y-O-Y average (+10%) (City and County of San Francisco, 2022). As of 2021, the average increase in property value across all CBD/BID districts was 73% since 2017. The citywide increase in property value during the same period was 46%. Properties in the following CBD/BIDs have seen the greatest increase in value: East Cut at +101%, Mid Market at +100%, and SoMa West +102% (Greater Downtown CBD/BIDs) and Lower Polk at +515% (Neighborhood CBD/BID). These findings should be considered with caution towards the future as the long term consequences of COVID-19 and its impact on property value have yet to be determined.

When COVID-19 shut down San Francisco, CBD/BIDs were well-positioned to support the businesses in their districts. The CBD/BID Leadership and Staff survey revealed generally positive working relationships with City departments and agencies, and comments from the survey suggest that there stands to be a stronger collaboration with the Office of Small Business as CBD/BID staff intimately know the unique challenges and struggles of the business community they serve.

38% of San Francisco's total office inventory is located within the nine Greater Downtown CBD/BIDs.

Over 90% of survey respondents agree that the Retail and Ground Floor Vacancies were negatively impacted by COVID.

There has been a **78%** increase in retail vacancies in CBD/BID districts since 2017. However, this trend is lower than the citywide average, which saw a 100% (2x) increase in retail vacancy since 2017.

The available evidence points to the positive impact of CBD/BIDs and their contribution to the economic health of San Francisco neighborhoods. By the same measure, more information stands to be gathered from the businesses and property owners about how economic development initiatives or programs serve their localized needs. This information would allow CBD/BIDs to understand the efficacy of the new economic development initiatives led by CBD/BIDs, provide insight into how CBD/BIDs ease the navigation of government resources, and most importantly, ensure economic development strategies are informed directly the needs of the business community and not a reaction to expectations from the City and County of San Francisco. The need to gather more information around the economic impact of CBD/BIDs is not unique to San Francisco and has been observed to be an area of opportunity for BID programs internationally (Guimarães, 2021).

In Greater Downtown San Francisco, there are eight CBD/BIDs that sit immediately adjacent to one another, and several sit adjacent to Neighborhood CBD/BIDs as well. As of 2021, there are efforts underway amongst CBD/BIDs to coordinate with one another around economic development strategies.⁷ Coordinating economic development strategies amongst CBD/BID place management organizations could ensure that their efforts are complementary for the greater areas these CBD/BIDs are sited in, such as Greater Downtown San Francisco. Collaborations can also show the City and County of San Francisco, especially the departments that award grants to CBD/BIDs, how combined efforts can extend the impact of government funding to affect economic development.

⁷These collaborations include coordination around new ambassador services supported by SF Travel and the City of San Francisco and multiple CBD/BIDs pursuing a economic recovery grant opportunity.

Case Studies

National Case Study: BID-Government Partnerships for Public Spaces and Revenue Sharing

[Downtown Chandler Community Partnership and City of Chandler's Downtown Stage](#)

Chandler, Arizona

Downtown Chandler Community Partnership and the City of Chandler shared the costs to construct a permanent stage in downtown. A cost-sharing agreement was also arranged, and the stage has become a venue able to attract significant acts and crowds to downtown, as well as generate revenues for the city and DCCP.

National Case Study: Planning for the Future of Commercial Districts

[City of New York's Neighborhood 360 Grant Program](#)

New York, New York

This public-private partnership focused on identifying services that would best launch and maintain commercial revitalization projects. Through proactive planning and targeted, long-term commitments, the NYC Department of Small Business Services has developed a grant program for Business Improvement Districts and other not-for-profit organizations. The funding focuses on many approaches: business attraction/retention, area-marketing, public programming and street activations, streetscape improvements and other services combined with a robust data collection system to track progress.



San Francisco Case Study: Lower Polk Tenant Landlord Clinic

Lower Polk and SOMA West Community Benefit Districts

Through a grant with the Mayor's Office of Housing and Community Development, the Lower Polk Community Benefit District (LPCBD) launched the Lower Polk Tenant Landlord Clinic, an advocacy organization that serves residential and merchant tenants at risk of eviction. Their work also extends to landlords seeking mediation services. The organization leverages hyper-local relationships fostered by the LPCBD and connects people in need with pro-bono case managers from groups like the Bar Association of San Francisco, University of California Hastings College of the Law, and La Voz Latina. As residents, small businesses, and landlords navigate the ever-changing landscape of COVID-19 and economic instability, LPCBD, and new partner SOMA West CBD, will be able to provide immediate and neighborhood-focused services in this time of great need.

Takeaways

- In times of economic hardship, CBD/BIDs are fast acting and supportive for small businesses in need of solutions and support that are sensitive to their unique needs.
- While property value exceeds citywide averages in CBD/BIDs, the impact of COVID-19 on office and retail vacancies hit Greater Downtown CBD/BIDs especially hard.
- ◆ The City and County of San Francisco must look to CBD/BIDs for hyper-local economic development needs and insights.

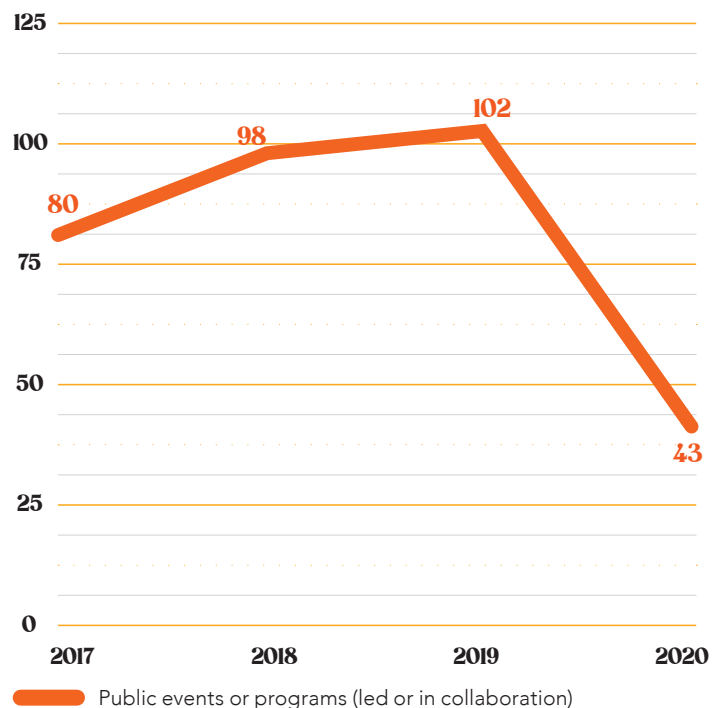
Placemaking & Public Art

Key takeaway:

Over 30 public art installations produced by CBD/BIDs since 2017.

Creating and upholding a sense of community is a point of pride for San Francisco CBD/BIDs, according to findings from the CBD/BID Leadership and Staff Survey. Each CBD/BID in San Francisco serves a community with a special history. Often the leadership of a CBD/BID, or actively involved constituents, found their way to the organization because they care about their neighborhood, and the organization presented a way for them to deepen their connection. Compared to all of the services areas covered in the CBD/BID Leadership and Staff Survey, the respondents rated their work in Placemaking and Public Art with the highest satisfaction rating for overall performance. Prior to COVID-19, CBD/BIDs had a combined 39 million people coming into their district in fiscal year 2018-2019 (Placer, 2022).⁸ This is the work that supports street fairs, special community celebrations, welcoming new murals or sculptural work in plazas, and much more. The efforts each respondent feels most positive about in terms of overall impact on the

CBD/BID Programs and Events



Source: CBD/BID Annual Reports and Executive Director Interviews

“

The CBD/BID creates a sense of identity for the neighborhood by having events and gatherings where all [are] welcome. [We are] able to express their thoughts and opinions as well as have programs like the Bloom events, where every year between [March and May] they will have flowers set up in the district.”

— Zuhul Weber

Employee of a Union Square Business.
Union Square Alliance Constituent

community is programming, which means a CBD/BID either leads or supports programs through funding and/or other staff services (e.g. cleaning), followed by placemaking and public art initiatives for the neighborhood.

For each organization, placemaking and public art may take different forms. For the purpose of this report, placemaking is broadly defined as CBD-led or co-led initiatives that fundamentally seek to empower community visions for how public spaces can be utilized to strengthen community connection. Placemaking initiatives could include larger strategies for landscape or streetscape design, events, programs, parks, policies, dedicated staff, and any other decisions or actions that reinforce opportunities to turn public spaces into places for people to gather and engage. Events and programs are outputs of these placemaking initiatives, as are public art projects.

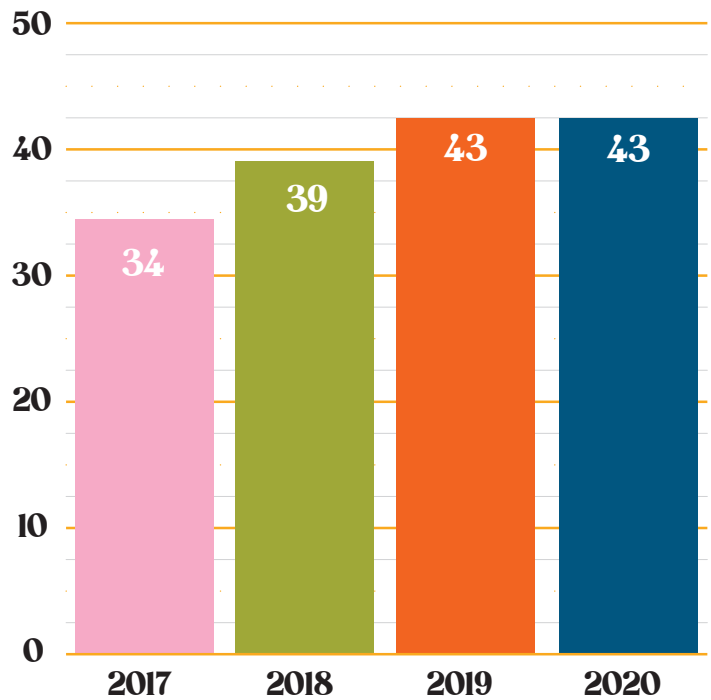
The impact of COVID on this work, especially Events and Programming, was profound. As of 2022, the number of unique visitors have returned to pre-pandemic levels when CBD/BIDs are examined collectively. However, each CBD/BID has had varied levels of return, both with unique visits and visiting frequency. In 2020-2021, the frequency of visits from employees and other non-residents was down across all CBD/BIDs by 40% when compared to 2018-2019 visiting rates. At least 102 events and programs were put on by CBD/BIDs in 2018-2019, and in the first year of the pandemic that number dropped to 42. However, the value of outdoor gathering spaces was amplified by COVID-19. Placemaking efforts persisted, even growing at the CBD/BID program level year-over-year. Respondents to the CBD/BID Leadership and Staff Survey and interviewed constituents agree that the presence of outdoor spaces—especially those made possible by the Shared Spaces initiative such as parklets—were vital for the economic recovery of small businesses such as restaurants and cafes.

In regards to City agency and department collaboration, feedback from the CBD/BID Leadership and Staff survey suggests that the organizations have appreciated the inter-agency initiative known as Shared Spaces. This program was born out of the pandemic and the need to easily create outdoor spaces for businesses and the greater community to utilize so long as indoor gathering poses a health risk. Shared Spaces is a one-stop-shop for permitting outdoor spaces and events such as parklets.⁹ One organization indicated a positive working relationship with the Shared Spaces program, and several others are eager to strengthen the collaboration with Shared Spaces. CBD/BID Executive Directors noted through their interviews that permitting is tedious and confusing for many small businesses, and CBD/

“
We do appreciate the creation of the Shared Spaces Program. It has literally saved what businesses are left.”
— CBD/BID Leadership and Staff survey respondent

⁹This figure only includes visitors to the CBD/BIDs, or anyone spending time in the area, including employees. Residents are not accounted for in this figure.

CBD/BID Placemaking Projects / Initiatives



of placemaking projects/initiatives (led or in collaboration)

Source: CBD/BID Annual Reports and Executive Director Interviews

BIDs stand to be helpful in streamlining or easing this process should a more formal partnership with the Shared Spaces program be forged. Of the CBD/BIDs that provide services for San Francisco Recreation and Parks Department parks, all indicate a very positive working relationship with the department. In all, there are at least 10 public parks served by CBD/BIDs in San Francisco in addition to dozens of public and private plazas and public event spaces.

Placemaking and public art is a point of pride for CBD/BIDs in San Francisco, and while COVID-19 dampened the number of programs made possible with the support of CBD/BIDs, they will likely be on the rise soon enough. However, which neighborhood stakeholders are able to access these programs is unclear, including small businesses that may be new to the neighborhood since the onset of COVID-19. A goal for CBD/BIDs that plan to bring back or launch new community programs could be to focus on learning more about who is able to access their programs, and which stakeholders may be left behind.

⁹<https://sf.gov/information/making-shared-spaces-program-permanent>

Case Studies

National Case Study: Activating Underused Alleyways

[Chicago Loop Alliance's Chicago Activate Initiative](#)

Chicago, IL

The Chicago Loop Alliance (CLA) wanted to recharacterize and activate underused alleyways which were perceived as dirty and dark. They initially began with a strategy to fill vacant retail storefronts with popups, and gradually transitioned to using the alleys as a venue for artists and other performers. The key elements to this program were utilizing local music and artists, lighting the alleyways and offering beer and wine. The CLA kept the location of the next activation a secret until the week prior, to generate buzz and suspense around the event.

National Case Study: Flexible Permits

Tampa Downtown Partnership and City of Tampa's Special Events Permit

Tampa, FL

Tampa Downtown Partnership worked closely with the City's Parks & Recreation Department to craft a special events permit that enables them to host unique events. The permit allows the Partnership to quickly mobilize and overcome some of the City regulations. Through this permit, the Partnership has hosted a series of pop-up bars focused on entrepreneurial brewers and was able to hold a food truck rally that previously would have been prohibited.



Image sourced from Civic Center CBD/BID online platforms

San Francisco Case Study: [Civic Center Initiative](#)

Civic Center Community Benefit District

The Mayor's Office published the Central Market / Tenderloin Strategy in 2015 and prompted game-changing inter-agency, public-private economic and public realm projects in the neighborhood. One of the boldest initiatives involved near-term activation, new cleaning and maintenance programs, and capital improvements to the public spaces in Civic Center, including Civic Center Plaza and United Nations Plaza. After the Office of Economic and Workforce Development aligned public and private partners, the Civic Center Community Benefit District became the lead managing entity for the Civic Center Initiative, overseeing new community programs, public art projects, playground stewardship, and a new cafe.

Takeaways

- A Shared Spaces and CBD/BID program partnership can increase accessibility for permittees.
- As placemaking initiatives resume post COVID-19, CBD/BIDs should find strategies to learn about who is accessing placemaking, events, and public art programs - and who might be left out.
- ◆ Increased CBD/BID feedback from community members about public programs, placemaking, and public art may reveal new or prioritized requests for public programs.

Community Engagement & Advocacy



As an entity created to serve a hyper-local community, whose existence is financially achieved through the investment of local stakeholders, engagement and advocacy are integral to the management plans and staff roles for each CBD/BID. Interviews with the Executive Directors of the San Francisco CBD/BIDs reinforce a shared goal across all organizations: They want to advocate for the people they serve and serve as a voice for the community. This passion has translated into successful community impact in scenarios where San Francisco CBD/BIDs have had the resources to serve as this community voice, or situations where government partners have compensated CBD/BIDs for their role as organizer - and link - between City agencies and community stakeholders.



For these place management organizations, of which many are officially classified as 501(c)3 organizations, advocacy refers to efforts to bring attention to needs or desired changes that will benefit the communities that they serve. This work does not refer to political lobbying or supporting a political candidate. As such, advocacy work that was consistent across the CBD/BID program touched on pedestrian safety and neighborhood specific issues such as cleaning needs, small business support, and specific infrastructure projects or messaging around infrastructure projects such as streetscape work that impacts access to small businesses. In recent years, the CBD/BID organizations have formed the San Francisco Business Alliance where they informally connect with one another about pressing issues and program alignment to advance their advocacy work. The mission of this organization stands to inform the greater San Francisco community as to how CBD/BIDs and the like organizations seek to create change as a collective.

Key takeaway:

San Francisco CBD/BIDs have at least 168,139 social media followers.

An area of focus for CBD/BIDs and their advocacy work has been in the realm of pedestrian safety. In 2020-2021 alone, there were nearly 20 unique projects CBD/BIDs were advocating for in their neighborhoods. In some cases, CBD/BIDs have been brought into projects by SFMTA to assist with stakeholder collaboration and outreach. For example, the Tenderloin CBD was compensated by SFMTA for their role as community organizer as part of the Tenderloin Traffic Safety Improvements Project.¹⁰ This compensation reflects the value that CBD/BIDs are able to provide to important civic projects.

In general, there stands to be a program-level analysis of how advocacy impacts the CBD/BID neighborhoods when compared to neighborhoods that lack community-based organizations advocating for pedestrian safety improvements. This information could be included explicitly in Annual Reports or in the Office of Economic and Workforce Development’s Annual Report requirements.

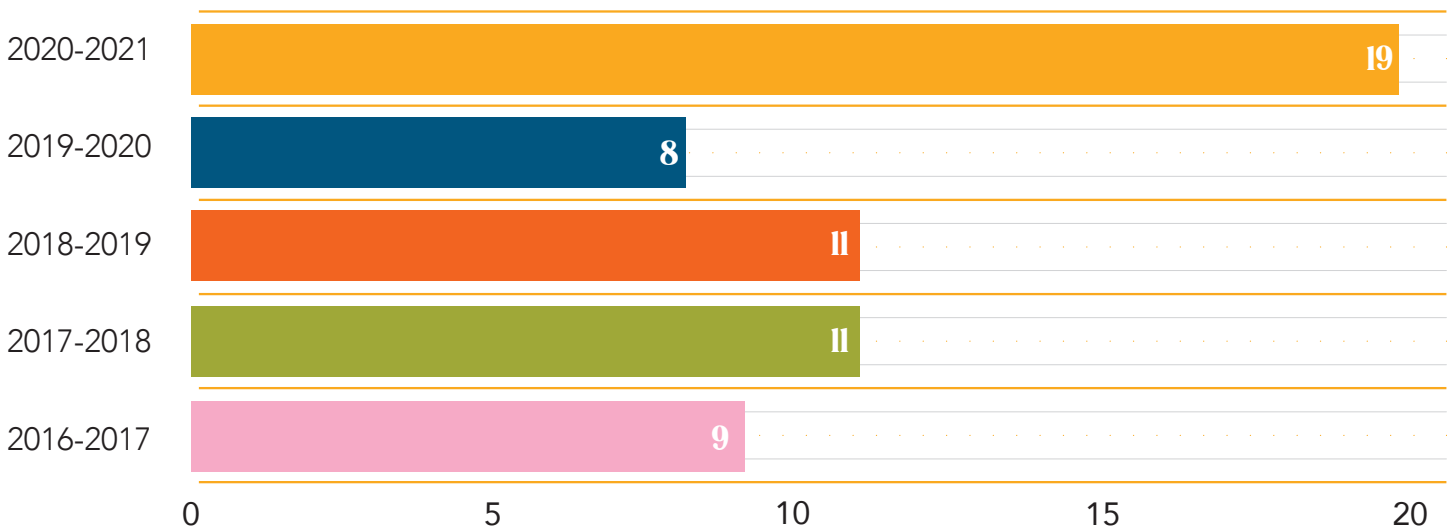
In addition to advocacy work, which is made possible due to existing relationships with community stakeholders, CBD/BIDs also invest in in-person and online engagement efforts to build and maintain relationships with new community members. COVID created an opportunity for organizations to improve their online outreach and engagement strategies, but the survey revealed that the CBD/BID staff and leadership feel in-person engagement suffered due to the pandemic. Web traffic information was



“
[The Castro CBD] includes local residents and business owners on their committees and are constantly seeking feedback. They are always open to public comment, which they get frequently!”

— Mat Schuster
Business Owner, Castro CBD Stakeholder

Public Transit and Pedestrian Safety Projects Advocated for by CBD/BIDs



of public transit / ped safety projects advocated for by CBD/BIDs
 Source: CBD/BID Annual Reports and Executive Director Interviews

¹⁰ The Tenderloin Traffic Safety Improvements project has led to at least nine initiatives to improve the safety of sidewalks and streets in the neighborhood. More information can be found at the following link: <https://www.sfmta.com/projects/tenderloin-traffic-safety-improvements-project>.

25% of business owners within CBD/BID districts prefer to use a language other than English.

insufficient for inclusion in the report, however the follower count for social media platforms (combined) sits at 168,139. An individual organization’s social media count typically ranges between 500 and 4000, however Union Square and Fisherman’s Wharf are exceptions. Union Square has around 85,000 followers and Fisherman’s Wharf has around 16,000 followers. The one organization that indicated a great deal of web traffic was Fisherman’s Wharf CBD, whose strategic partnership with the Fisherman’s Wharf Business Association resulted in an uptick of web traffic.

There is an opportunity for CBD/BIDs to improve language accessibility for the information distributed by the CBD/BIDs. Only a few of the organizations translate their materials on a somewhat regular basis - including Downtown CBD, Japantown CBD, and the Tenderloin CBD - despite 25% of business owners within CBD/BID districts prefer to use a language other than English (Office of Economic and Workforce Development, 2021).

In the CBD/BID Leadership and Staff Survey, respondents were asked to provide feedback on their relationship with the elected officials that represent their districts, including the Mayor’s Office and Board of Supervisors. On the whole, the responses were generally positive or neutral. The comments revealed that the ranking of satisfaction with how an elected official serves their constituents comes down to the quality of their relationship with that office and their staff. As noted in other sections of the report, COVID and other crises cause City agencies, departments, and elected officials to turn to CBD/BIDs as community organizations and leaders to aid them in delivering rapid services or pivoting programs to address changing needs in the neighborhood. Ongoing, high-quality relationships with elected officials are helpful in maintaining healthy expectations of what can be expected of CBD/BID leadership and staff.



Image sourced from Tenderloin CBD/BID online platforms



Image sourced from Ocean Avenue CBD/BID online platforms

“

COVID certainly made communication difficult. So much of the work of CBD’s is meeting with people and learning about their strengths and challenges. Not being in the neighborhood and working remotely certainly limited my ability to do this well.”

— CBD /BID Leadership and Staff survey respondent

Case Studies

National Case Study: Inclusive Place-Based Economic Development

Community Engagement Strategy for Charlotte's Historical West End Transformation

Charlotte, North Carolina

In 2015, Charlotte's downtown association, Charlotte Center City Partners, was invited by neighborhood advocates to catalyze a multi-year partnership effort to transform the corridor. Work in the Historic West End started from a place of distrust. Stakeholders in the corridor did not understand the UPMO's interests and goals. There were many questions about who would benefit most from this work to bring new energy and investment into the area. Building trust with stakeholders from all sides was the first step, and it continues to be the most important part of the initiative.



San Francisco Case Study: Pedestrian Safety Program and Safe Passage

Tenderloin Community Benefit District

Since fiscal year 2016-2017, CBD/BIDs across the city have been engaged in at least 12 SFMTA and other transit projects per year, advocating for safer streets for their communities. The TLCBD has transformed their advocacy work into a proactive initiative by forming the Pedestrian Safety Program and housing the long-standing Tenderloin Safe Passage program, which deploys volunteers around the neighborhood to help children and seniors safely navigate busy intersections. This proactive work has resulted in collaborations with groups such as the San Francisco Bicycle Coalition and community engagement strategies that empower and enable neighborhood-led pedestrian safety campaigns.

Takeaways

- Translation services must be provided for CBD/BIDs so they are able to connect with the stakeholders that do not prefer or use English as their primary language.
- CBD/BIDs have achieved a great deal of accomplishments through their advocacy work, and it would benefit these organizations to share these wins with their stakeholders.
- Strong relationships between City leadership and CBD/BIDs enable important connections between high-level citywide goals and hyper-local implementation.

Social & Human Impact

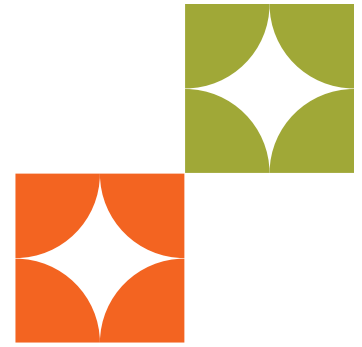


Image sourced from Tenderloin
CBD/BID online platforms



Image sourced from Tenderloin
CBD/BID online platforms

The Social and Human Impact section refers to the growing crisis of people experiencing extreme hardship in the public right-of-way and how these neighbors and their realities intersect with the work of CBD/BIDs, directly or indirectly. These hardships may include but are not limited to individuals experiencing homelessness, individuals living with mental health challenges, and individuals experiencing drug addiction. As CBD/BIDs are not classified as social service organizations, each entity has approached this work through a different lens, guided by their organization's leadership and a commitment to compassion. For the purpose of this study, this term seeks to encompass human experiences that are visible or are compounded by dynamics in the public right-of-way, such as sidewalks, parks, plazas, streets, alleys, and the vicinity adjacent to ground floor building entrances as these are experiences that intersect with the CBD/BID services and staff most often.

People experiencing extreme hardship in the public right-of-way is a reality much greater than the scope of a CBD/BID and their services. These challenges are not unique to San Francisco. Cities across North America are faced with tremendous numbers of unhoused community members, drug use, drug dealing, and mental health challenges on sidewalks, streets, public parks, and other shared, communal open spaces (Lee, 2018). In 2021, California was home to 160,000 people experiencing homelessness, and across the United States, that number is 580,000.¹¹ In San Francisco, the most recent Point in Time (PIT) Count, a biennial count of people experiencing homelessness at a given point in time, revealed the overall number of people experiencing homelessness has decreased by 3.5% overall, and unsheltered homeless counts are down by 15%, or people that are living mostly in open air (public or private) spaces. This PIT Count was conducted on February 23, 2022 and the prior PIT was conducted in 2019 (City and County of San Francisco, 2022).

Key takeaway:

In 2020, CBD/BIDs were a part of at least 20 unique programs or partnerships to aid people experiencing homelessness or other hardships in their communities.

¹¹ These figures come from the National Alliance to End Homelessness and were accessed in June 2021. For more information on their methodology for tracking people experiencing homelessness, visit their website: <https://endhomelessness.org/homelessness-in-america/homelessness-statistics/state-of-homelessness-2021/>

Historically and as reflected in the CBD/BID management plans, the CBD/BIDs' guiding missions and staff capacity have not explicitly pointed to possessing an expertise in service areas that directly assist individuals experiencing hardship, such as social work, social welfare, or public health. However, San Francisco CBD/BID organizations have adjusted their services to support these community members. In 2020, San Francisco CBD/BIDs reported that they deployed a combined 20 initiatives for people experiencing hardship in their district. The majority of these initiatives (80%) are led by the Greater Downtown CBDs and not the Neighborhood CBDs, except for Lower Polk CBD and Castro CBD. These initiatives include direct services, referrals, and other resources or monetary support. Overall, CBD/BID staff, board members, and Executive Directors that responded to the CBD/BID Leadership and Staff Survey agree that their social service collaborations or other social and human impact work should continue, not end, and emphasized how COVID-19 seriously impacted the efficacy of this work. Only one Executive Director and one board member indicated that these services should be pulled back, and a majority of all responding staff indicated that services provided by their organizations should be increased.

In addition to unique initiatives and collaborations, CBD/BID staff configurations have adapted to the needs of social and human impact work. Several organizations employ outreach workers and/or provide specialty training for their staff so that clean team members and community ambassadors are equipped with the knowledge and resources to direct an individual in need to services or perform harm reduction work such as administering NARCAN to prevent a drug overdose.

CBD/BID Leadership and Staff Survey respondents believe collaboration with service-oriented organizations and referrals to service organizations are the most impactful areas of work for their organizations.

Clearly an evolving space and unclear role for the CBD/BIDs, the CBD/BID Leadership and Staff Survey revealed an inconsistent understanding of the social and human impact services being provided by the CBD/BID between Board Members, Staff, and Executive Directors. There is varying perspective on what prompted the need for social and human impact services:

- #1 reason according to Staff and Board Members: Property Owners and Businesses
- #1 reason according to Executive Director: Board Feedback

However, regardless of what the respondents viewed as the prompt for their services, or if services should expand or continue as-is or be eliminated, there is agreement about the most impactful service when respondents were asked to rank the efficacy of their CBD/BID's direct services, referrals, and other resources or monetary support:




- Collaboration with service-oriented organizations
- Referrals to service organizations




Image sourced from Tenderloin CBD/BID online platforms

Yet the issue remains: What should the role of CBD/BIDs be in addressing the needs of people experiencing hardship? What can be done to clarify their responsibilities as organizations that are directed by a management plan? As revealed by the survey and interviews with Executive Directors, there is a consensus that people experiencing hardship and the physical impact of these hardships in the public right-of-way will persist. Nearly all Executive Directors feel their work to support these individuals, either through direct services or through referrals, should continue. CBD/BID cleaning staff and programs, safety staff and programs, placemaking and public art staff and projects, and community engagement and advocacy work will continue to intersect with these people and their hardships on a daily basis as all of this work plays out in the public right-of-way. CBD/BID leadership and staff will have to continue to work internally, with their social service partners, and the City and County of San Francisco to face this reality and evolve their strategies for supporting their neighbors in need while delivering the management plan services that are expected of them.

Takeaways

-  CBD/BIDs can collectively work together to understand and define their role in social and human impact work, learning from each other about what efforts do or do not have effectiveness.
-  Continuing to learn from partner service-oriented organizations can help CBD/BIDs remain focused and prioritized.
-  The City and County of San Francisco stands to increase their collaboration with CBD/BIDs as they have a hyper-local, on-the-ground insight they can leverage.

The latest San Francisco Point in Time (PIT) count of people experiencing homelessness in the city revealed these changes from 2019 to 2021:

-  15% Decrease in Unsheltered Homelessness
-  3.5% Decrease in Overall Homelessness
-  18% increase in people living in shelters and transitional housing
-  11% decrease in chronically homeless single adults

CIVIC CENTER PIT STOP



toilets and sinks



needle disposal



dog waste station

Where neighborhood challenges meet civic pride.

**Open daily
9 am - 8 pm**

Image sourced from Civic Center CBD/BID online platforms www.sfpublishworks.org/pitstop

Case Studies

National Case Study: Business Improvement District-Led Social Services

Center City District Homeless Outreach

Philadelphia, Pennsylvania

Under the co-responder, or co-delivery, model, a mental health, drug and alcohol and/or social service professional joins a crisis-intervention-trained police officer to respond to incidents involving people exhibiting problematic behaviors often associated with mental health problems or drug and alcohol addiction. Although municipalities generally establish these programs, Center City District in Philadelphia, PA, decided to take matters into its own hands and pay for this program within its boundaries. Realizing that this coordination wouldn't happen naturally, CCD raised funds, partially through its foundation, to launch the "Ambassadors of Hope" program. The program now has two teams comprising a Project Home outreach worker (Philadelphia's lead non-profit homeless housing provider); a crisis-intervention-trained Philadelphia Police officer; and a Community Service Representative Homeless Outreach Team member from CCD. They are supported by mental health professionals from Penn Medicine and from the City's Department of Behavioral Health. The teams patrol Monday through Friday, 8:30am–3:30pm, visiting chronically homeless individuals, but also respond to emergency incidents. Social service and outreach workers initiate each discussion, and the teams have learned from their members' respective protocols. CCD dedicates a van to transport those who agree to accept services and shelter. Over the past four years, the teams have helped more than 525 unsheltered people come off Center City sidewalks, parks and concourses and connect with housing, services and/or treatment providers.

San Francisco Case Study: Hiring Outreach Workers and Specialty Training for Staff

SOMA West CBD, East Cut CBD & Yerba Buena CBD

As the need for San Francisco's unhoused community to locate and access resources persists, several CBD/BIDs have made changes to their staff in order to better serve all constituents in their district. SOMA West CBD employs a full-time Outreach Director. This person is able to liaise between the organization and City of San Francisco as well as with emergency services and neighborhood nonprofits that provide services for people experiencing homelessness, mental health crises, and addiction. Yerba Buena CBD and East Cut CBD also employ a Social Services Specialist who performs duties similar to those of the SOMA West CBD staff person, including escorting individuals to upcoming appointments or other services. SOMA West CBD and other CBD/BIDs across San Francisco have started to provide special training and education for their cleaning staff and community ambassadors, including de-escalation and harm reduction strategies.



“Our CBD was not created to deal with this issue, but we've had to adjust because our mission is safer streets. There needs to be better city leadership around this and it must center around the steepening financial inequality.”

— CBD/BID Leadership and Staff Survey respondent

Operational & Financial Performance

The CBD/BID program in San Francisco is nearly two decades old, and nearly 50% of the operating CBD/BIDs were established in the last 10 years. In the national context of CBD/BID programs, this program is well into its tenure, and yet, the clip of the program's growth has remained steady. Since 2014, there has been a new CBD/BID established every year up to 2020 with the exception of 2016 (six total). The rate of CBD/BID creation and renewal as well as the percentage of commercial land coverage so far by these organizations (20% of citywide land) sets the stage for more organizations to come.

There are 15 Executive Directors serving the 15 CBD/BIDs. There is one individual that oversees two organizations—Civic Center and Mid Market—and another CBD that has two co-Executive Directors, Discover Polk. There are 219 Board Members serving CBD/BIDs, and there is an average of 14 Board Members per organization. Board Member count is consistent across Greater Downtown CBDs and Neighborhood CBDs. In total, there are at least 60 CBD/BID decision-making Committees, a number that does not count informal working groups. Staff counts as of Spring 2022 include a total of at least 95 in-house staff and 201 contracted staff (including cleaning, landscaping, and other contracts for services). There are at least 57 staff that serve in a safety capacity and 155 cleaning staff.



Identify with a race or ethnicity other than white

- 50% Staff Members
- 38% Board Members
- 33% Executive Directors

Note: 9 people of 81 respondents withheld ethnicity information.

Key takeaway:

\$2.7 million in government grants were awarded to CBD/BIDs in FY 2019-2020.

Nearly **50%** of the operating CBD/BIDs were established in the last 10 years.

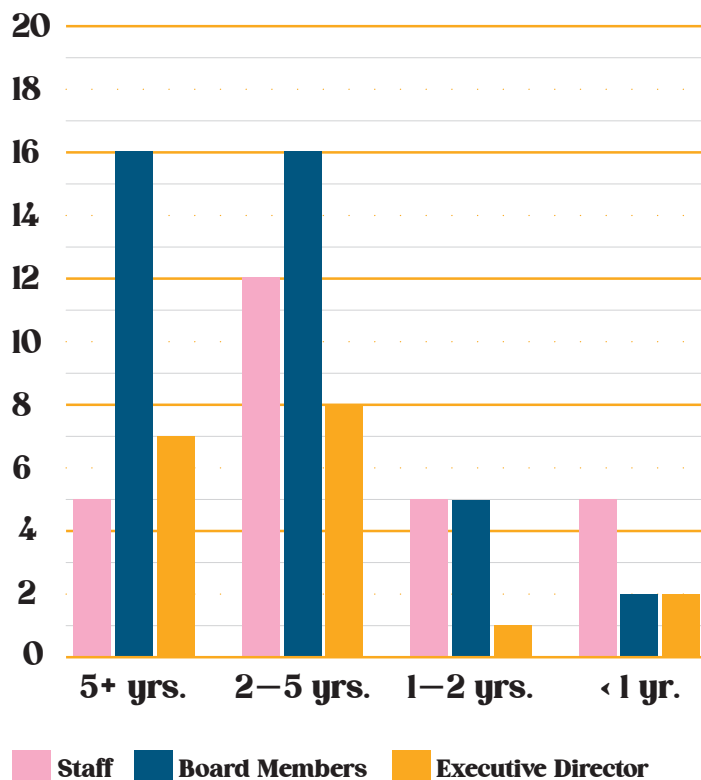
There is a notable difference in staffing between Greater Downtown CBD/BIDs and the Neighborhood CBD/BIDs. The Neighborhood CBD/BIDs have in-house staff counts that range from one to three people (including the Executive Director) whereas Greater Downtown CBD/BIDs staff in-house anywhere between four and 25 people. 80% of the CBD/BID Executive Directors, 82% of Board Members, and 62% of staff have been with their organization for more than two years, meaning pre-pandemic, according to the CBD/BID Leadership and Staff Survey respondents. Executive Director interviews and analysis of management plans revealed CBD/BID organizations shifted staffing configuration, area of coverage, and overall goals through their renewal processes, and staffing changes occurred as COVID-19 impacted their neighborhood's needs.

When CBD/BIDs are formed, the mechanisms in place to hold the place management organization accountable to managing assessment revenue and any other revenue include financial oversight performed by their Board of Directors, and in some cases, a Finance committee. Additional accountability mechanisms include the Office of Economic and Workforce Development Annual Report and Benchmarks, which are shared with the Board of Supervisors on a yearly basis, and include the submission of certified public accountant (CPA) financial review.¹² Each organization would benefit from developing a Financial Policies and Procedures document approved by the board.

On average, 66% of revenue for CBD/BIDs came from Assessment Revenue.

82% is the average score for the Office of Economic and Workforce Development's Annual Report's benchmarks.

Length of Affiliation with the CBD/BID



Transparency is critical to good governance and making the Board approved Annual Operating Budget, Board Approved Annual Report and Board approved CPA Annual Review available on the organization's website is a best practice.

- Board-Approved Annual Operating Budget
- Board-Approved Annual Report
- Approved CPA Annual Review

While San Francisco's CBD/BIDs endured significant impact as a result of COVID-19, the operational and financial performance of the organizations remained incredibly stable throughout. According to the Office of Economic and Workforce Development, actual revenue (\$30,323,485.06) for the CBD/BID program exceeded budgeted revenue (\$25,954,855.58) for FY 2019-2020. Meaning, the impact of COVID-19 did not impact the ability of CBD/BIDs to collect assessment revenue.

In FY 2019-2020, CBD/BID revenue from sources other than Assessments included \$2.7 million in government grants from the City and County of San Francisco (e.g. OEWD grants) and \$3.4 million from other sources. The allocation of government grants varies from one organization to the next, and this information is not tracked or reported consistently through the OEWD annual reporting mechanism. 85% of staff and 100% of Executive Directors visited their CBD/BID district on a daily or weekly basis during 2021, despite COVID-19 restrictions and challenges.

As official racial equity plans, strategies, and training have become common practices for CBD/BID organizations across the country, and an objective for the City of San Francisco in the last several years, CBD/BIDs in San Francisco were asked to share the status of work around broad or specific racial equity goals. This work is not required by the City and County of San Francisco nor is this work required according to any organization's management plan.



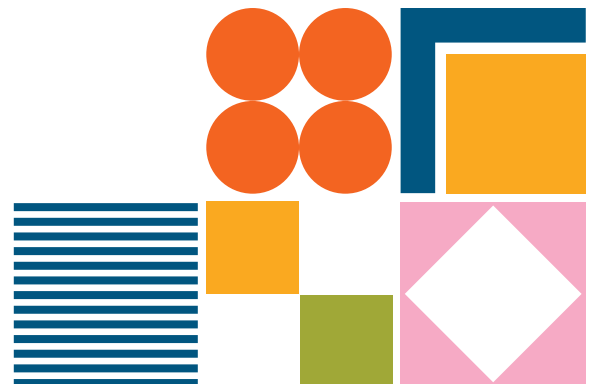
Image sourced from Lower Polk CBD/BID online platforms

Takeaways

- Racial equity work must be prioritized and supported by the City and County of San Francisco.
- Staffing varies and CBD/BIDs can learn from each other about what workforce configurations work best.
- ◆ Leveraging the proven stability of CBD/BIDs could lead to forms of support for other community-based organizations, if and when capacity allows.

Requests to each CBD/BID revealed that most organizations have yet to specifically address a plan or strategy for explicitly addressing racial equity within their organization or are just beginning the process of creating goals or a plan to address racial equity. Three organizations have plans underway to address racial equity explicitly in their work: Downtown CBD, Union Square Alliance, and Japantown CBD.

San Francisco CBD/BIDs are stable organizations, in spite of COVID-19's economic turmoil. This stability is an important fact for the neighborhoods they serve. Present day, the number of staff per organization varies. CBD/BIDs may be able to learn from one another about how their specific staffing configuration allows them to address challenges that they all share. Prioritizing racial equity plans, strategies, and training should be supported by the City and County of San Francisco through leadership and financial support to implement this work.



Case Studies

National Case Study: Building Racial Equity and Opportunity in Our Downtowns

Downtown Grand Rapids Inc. GR Forward Initiative

Grand Rapids, MI

Strengthening racial relations and equity today stands as a top priority across the United States, and Grand Rapids, MI is a microcosm of those challenges. As the community grows more diverse, Downtown Grand Rapids must evolve to appeal to and serve a variety of diverse interests. To help lead locally, Downtown Grand Rapids Inc. (DGRI) recently defined a new place-management and city building approach that aspires to make downtown increasingly diverse, welcoming and economically inclusive. The result was a two-year process – GR Forward – that hosted approximately 150 meetings and brought together more than 4,400 Grand Rapidians. The GR Forward process explicitly defined racial equity goals and identified a coalition of racially and ethnically diverse partners to lead the development of the framework.



Image sourced from Downtown CBD/BID online platforms

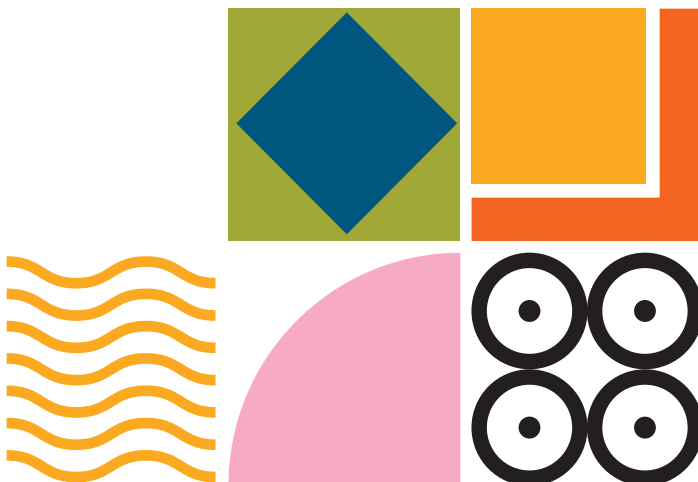
San Francisco Case Study: Racial Equity Organizational Framework

Downtown CBD, Union Square Alliance, and Japantown CBD

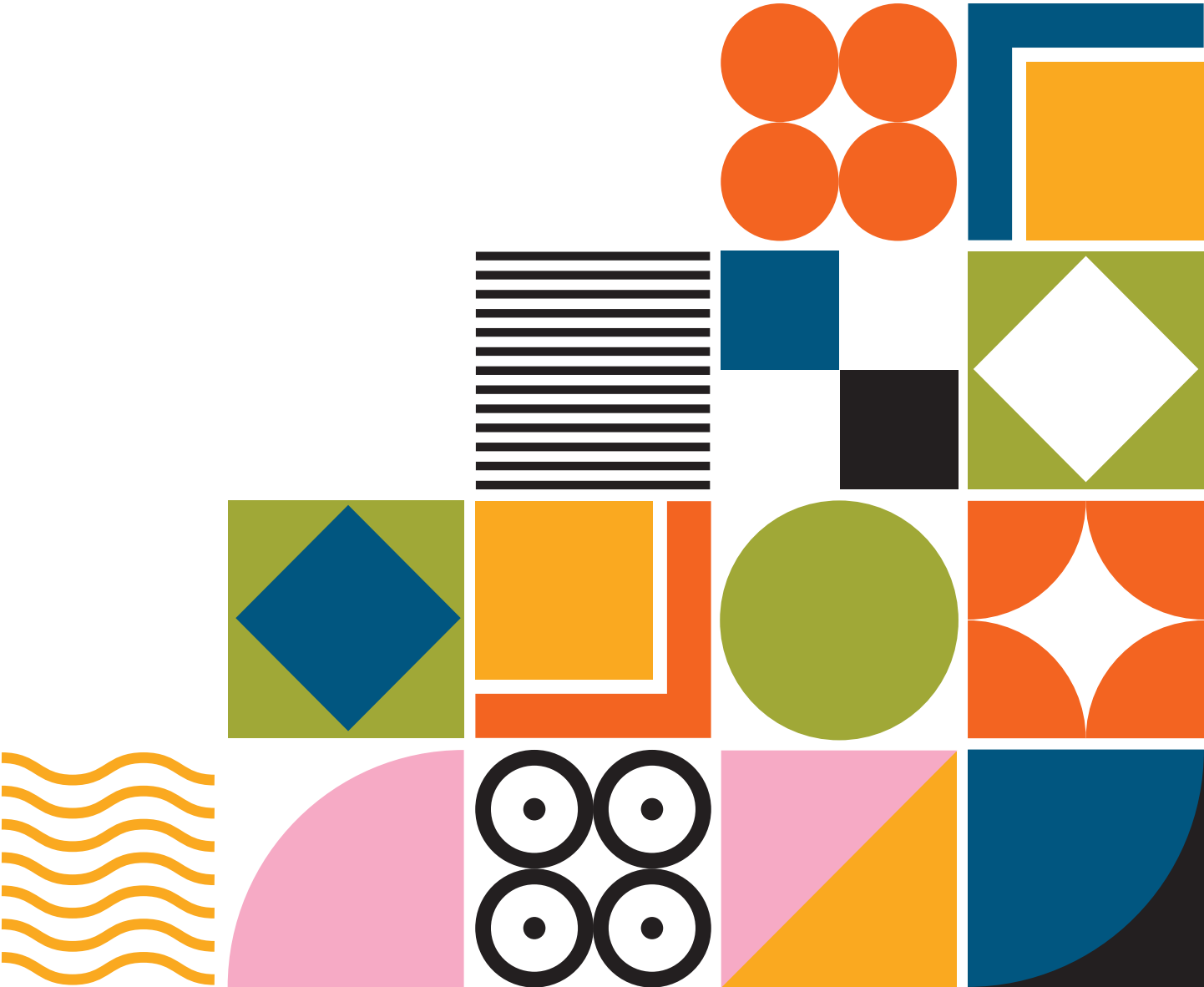
As official racial equity plans, strategies, and training have become common practices for CBD/BID organizations across the country, and an **objective for the City of San Francisco**, at least three of San Francisco’s fifteen CBDs have started the process of creating official racial equity goals for their organizations. Downtown CBD has hired a firm to lead a strategic planning process for the organization, and the Union Square Alliance is commencing their process with their Board. Japantown CBD’s staff has put together racial equity recommendations for the organization and has shared them with the Board, looking to the City of San Francisco’s Racial Equity Framework as a starting point.



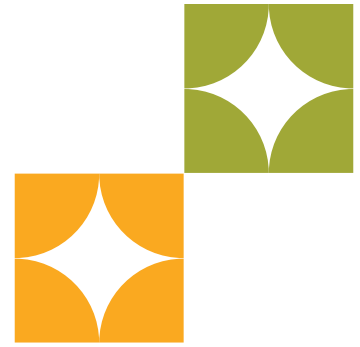
Image sourced from Union Square CBD/BID online platforms



Conclusion & Next Steps



Conclusion & Next Steps



The CBD/BID Program's impact on the city has been profound. As San Francisco faces this historic moment of challenges in its neighborhoods—struggles with clean and safe streets, businesses large and small departing the city, and residents, workers, and tourists unable to enjoy the city—CBD/BIDs are ready and willing partners to take on this work.

The majority of the place management organizations overseeing these districts have proven themselves to be effective leaders in their communities and successful in their implementation of their core services. In many cases, these organizations have gone above and beyond to meet the needs of their stakeholders, from inclusive and beloved placemaking initiatives to timely economic recovery strategies.

The San Francisco CBD/BID program's growth over the last decade has been consistent, and this pace of growth is not likely to slow down. For example, CBD/BIDs only cover 8% of San Francisco's land, around 20% of commercially zoned land, and 39% of San Francisco's total office inventory. There are dozens of central business districts and mainstreets across the city that have yet to create a CBD/BID, and the need for their services is there. San Francisco has seen a 100% increase in retail vacancy since 2017. The volume of 311 calls continues to grow.

CBD/BIDs have been and continue to be uniquely positioned to address hyper-local, neighborhood-specific needs. CBD/BIDs organizations have staff on the ground every day, witnessing the strengths and weaknesses of cleaning, economic, and placemaking strategies in real time. Assessment revenue has continued to be predictable and stable for CBD/BIDs, nearly unwavering in the face of COVID-19. This type of organization is suited for neighborhoods



with businesses and property owners that will need consistent and local support as they adjust to our post-COVID economic reality.

- 1 The City and County of San Francisco should leverage the localized expertise of CBD/BIDs and deepen their collaborations.** CBD/BIDs are eager to build on their relationships with City agencies and be seen as capable and equal partners. During interviews with Executive Directors, they made clear that when partnerships with City agencies are strong, great work is accomplished. These collaborations allow them to share the unique nature of local challenges, strategize together, and maximize the effectiveness of government and CBD/BID resources. Moreover, when these collaborations succeed, the neighborhoods feel their top needs are being addressed.

Now is the time for City agencies to think about how these collaborations can play out, especially as the City faces nearly insurmountable cleanliness, safety, and economic challenges. Data shows that the neighborhoods served by CBD/BIDs were hit especially hard (e.g., sales tax revenue, office and retail vacancy) by the economic repercussions of COVID-19. These areas need optimized support from the City. This report takes account of dozens of cleaning, safety, and placemaking partnerships underway, and those can and should continue to grow. The question for the City is: What government leadership is in place to advocate for these collaborations? How might projects, programs, and initiatives targeting neighborhood-level impact leverage the local knowledge and data collected by CBD/BIDs?



Image sourced from East Cut CBD/BID online platforms

2 CBD/BIDs should continue to collaborate and share their lessons learned. Collaboration between CBD/BIDs is underway, and there remain opportunities for each organization to work with one another to share their methods for collecting data and learn together about what is working—or not—with services and programs. This kind of collaboration can optimize cleaning and public realm, economic development, and social and human impact data collection systems and services. When San Francisco’s place management organizations are able to collectively tell the story and demonstrate the impact of their work, the citywide significance of the CBD/BID Program is evident and powerful.

3 CBD/BIDs must continue to find new ways - and continue effective strategies - to engage community stakeholders. The most important observation from each section of this report is that all CBD/BIDs strive to serve their stakeholders. The CBD/BIDs that create feedback opportunities for their stakeholders to see if their services meet their needs often use these findings to create new or improved services. Increasing engagement with the community, providing materials in languages other than English, distributing surveys to solicit feedback on how services are—or are not—working, and determining plans to advance racial equity within the CBD/BID place management organization and in the community are vital.

A great deal of pressure has been put on CBD/BIDs to grow services and develop new strategies to meet the needs of the neighborhood, especially in the face of COVID-19. Stakeholder feedback can be utilized to create and justify requests for support from the City and County of San Francisco.



Image sourced from Discover Polk CBD/BID online platforms



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Appendix

California Property and Business Improvement District Law Summary	pg. 76
CBD/BID Formation in San Francisco	pg. 76
San Francisco CBD/BID Assessment Examples	pg. 79
International Downtown Association Emerging Leadership Fellowship Program	pg. 81
American Community Survey (ACS) Neighborhood Boundaries	pg. 82
Performance Analysis Glossary	pg. 83
CBD/BID 2021 Assessment Revenue and Management Plan Budgets	pg. 85



Appendix #1

California Property and Business Improvement District Law Summary

CBD/BIDs established in San Francisco under The CA PBID Law of 1994, as augmented by Article 15 are subject to the following requirements:

- Districts may provide services that include safety, maintenance, marketing, capital improvements, economic development, and special events. Authorized services may be funded by property assessments.
- The formation of a district requires petition support from property owners responsible for contributing at least 30% of the total assessment budget.
- Following the petition process, property owners vote in a special ballot election that occurs for 45 days. More than 50% of the returned weighted ballots must be in support of the district for the Board of Supervisors to vote on its authorization.
- Noticing to all property owners within the proposed district must be provided in multiple languages during the ballot phase.
- Once the district has formed, the Management Corporation Board, a body responsible for overseeing the district, must maintain district merchant representation—those who do not own property—that is equal to 20% of the total board.
- District meetings and hearing are pursuant to the California Ralph M. Brown Act (Government Code sec. 54950 et seq.), as well as public records to the California Public Records Act (Government Code sec. 6250 et seq.).
- The term of a district may last up to 15 years, however, per a 2012 amendment to Article 15, those which levy bonds may have a term of up to 40 years.

The complete language of the law can be found at this website: oewd.org/cbd-legislation.

The most recent amendment to California State PBID law - Assembly Bill 2890 passed in April 2022 - can be found at <https://alcl.assembly.ca.gov/>.

Appendix #2

CBD/BID Formation in San Francisco

Community Benefit Districts represent a long-term financial commitment; therefore the formation of a new CBD requires the support of property owners and commercial tenants in the district. CBDs are formed when there is widespread support among property owners and commercial tenants. The detailed laws and regulations can be found at oewd.org/cbd-legislation.

CBDs vs. Merchants' Associations

While property owners and tenants could participate in a voluntary merchants' association, the CBD model presents two distinct advantages:

- Provides a steady and reliable source of funding whereas a merchants' association is dependent on voluntary contributions.
- Legislation states all property owners in a CBD must pay assessments; an individual who does not pay an assessment will be subject to the same penalties as if they had not paid their property tax bill. A merchants' association cannot enforce the financial participation of all stakeholders in a given district.

The formation of a CBD in San Francisco is organized around three phases:

Phase One: Community Benefit District Feasibility and Planning

- Develop a steering committee
- Conduct community outreach to assess support amongst property owners
- Confirm support from District Supervisor
- Hire a consultant team for outreach and preparation of reports
- Confirm funding source for formation process
- Develop services plan and budget
- Develop a boundary map

Phase Two: Community Benefit District Formation and Outreach

- Develop an assessment methodology and assessment rates
- Create of a management plan and an engineer's report

Phase Three: Community Benefit District Legislative Authorization

- Conduct petition and ballot voting process
- Pursue Legislative approval process

PHASE ONE

Form a Steering Committee and Confirm District Supervisor's Support

In Phase One, interested stakeholders organize a steering committee that oversees formation. At this point, the group or individuals considering CBD formation should contact OEWD staff and their district supervisor. The District Supervisor's support is important as they are usually responsible for introducing legislation related to the CBD. A steering committee should compose of property owners (i.e. big developers to small condominium owners), non-property owning business owners, and at large community stakeholders. Steering committee size is highly dependent on the size of the potential district. OEWD recommends a steering committee of between 11 and 15 core individuals for most CBD campaigns. At this meeting, the steering committee must decide whether or not to pursue CBD formation. If the decision is made to move forward, a vision statement should be created. This will serve as a shared point of view that will mobilize the community and help prioritize the work of the CBD.

Identify Boundaries and Property Information

Determining the boundaries of a potential district is one of the most important early items to accomplish in the process. This will determine where a proposed district would potentially provide services. Once the tentative boundaries have been established, a database that contains information on the properties, property owners, and commercial tenants must be created. Property information gathered by the Assessor's Office can be requested from the Office of Economic and Workforce Development.

Conduct Initial Surveys and Draft Service Plan

Once boundaries are identified and the database of property owner information are created, surveys are sent out to determine the level of support for a CBD/BID and to understand the types of services that are most desired. Surveys are accompanied by an initial round of outreach to key property owners and or businesses to ensure their support. A preliminary service plan and budget should be created during this phase to demonstrate how the revenue acquired through the CBD/BID will be spent. The types of services paid for by the CBD/BID should be arrived at through a process of surveying community stakeholders.

PHASE TWO

When funding is confirmed and preliminary outreach shows support for the CBD, funding must be confirmed for

the formation process via an OEWD grant or other funding sources such as funds from property owners, businesses, or other community stakeholders. This will mark the beginning of Phase Two, when the steering committee drafts a proposed management plan.

Management Plan

California Streets and Highways Code 3662 details what is required in a management plan.

Determine Service/Improvements: Review the prior work of the committee and the results of the property owners/ stakeholders needs survey to formulate a list of planned services and improvements for the district plan.

Common services/improvements provided by CBDs include, but are not limited to:

- **Sanitation and Maintenance:** Maintenance workers are hired to sweep streets/sidewalks and bag trash for pickup. Many CBDs also remove graffiti and paint public amenities (light poles, mailboxes, etc.) on a regular basis.
- **Safety and Hospitality:** Public safety officers are hired to serve as unarmed community guides. These guides also provide hospitality services to visitors by giving them directions and aiding in other ways.
- **Marketing and Promotion:** Common marketing activities include: displaying holiday lights, hanging promotional banners, publishing restaurant/shopping guides, and hosting special events. Additionally, CBDs may choose to plant flowers/trees to market their district by making it more attractive.
- **Capital Improvements:** Capital Improvements may include: purchasing new trash receptacles, making basic storefront improvements, and fencing in tree pits. Some CBDs have developed custom street signage, built newsstands, installed uniform news boxes, and renovated parks.

First Year Budget

Once the steering committee has determined which services/ improvements the district will provide, they will need to determine service scope and estimate cost. This is accomplished by creating the First Year Budget.

Assessment Formula

The assessment formula is used to compute the amount each property owner must pay on a yearly basis. The objective is to develop an assessment formula where the amount each property owner pays is roughly proportional to the benefit received by the property. An engineer certified by the State of California must develop the assessment formula. A formula can be based on one or more of the following variables. This is not an exhaustive list of variables, but ones that are common in San Francisco.

Formula Option	Definition
Linear Footage	Frontage is the portion of a parcel which faves a public right of way that will be serviced by a CBD. It is measured in linear feet. Frontage DOES NOT mean only the linear feet of the primary building entrance, but rather the linear feet of all parcel frontage which will be serviced by a CBD.
Building Square Footage	The number of square feet calculated by multiplying a building's width by its length.
Lot Square Footage	The number of square feet calculated by multiplying a lot's width by its length.
Assessed Valuation (ONLY FOR BUSINESS BASED IMPROVEMENT DISTRICTS)	The most recent assessed valuation of the property as defined by the City for usre in computing real property tax.

PHASE THREE

Petition

In order for the CBD process to continue – the steering committee will need to petition each property owner to determine whether or not they want to initiate special assessment proceedings. Each petition should include the Assessor Parcel Number (APN), Street Address, Proposed Annual Assessment (in dollars), Owner Percent of Total Assessment, and the Legal Owner Contact Information. A petition will be mailed to each property owner and commercial business expected to pay an assessment if the CBD is established. If respondents totaling at least 30% of the assessments proposed to be levied return the petition in favor of the CBD, the process will continue. If this threshold is not met, the process is stalled until the 30% threshold is met.

Ballot Period and Board of Supervisors Approval

Once OEWD completes review of the petitions and verifies the 30% threshold, the petitions and cover letter will be submitted to the Clerk of the Board of Supervisors via submission by the appropriate district supervisor(s). Following approval of the proposed management plan and engineer's report by the Board of Supervisors, via approval of a resolution of intent to establish a new CBD/BID, ballots are mailed out with the management plan and assessment engineer's report to all property owners and businesses being assessed in the proposed CBD/BID by the Department of Elections. A public hearing is held at the culmination of the 45-day ballot period. For a CBD/BID to pass, it must receive at least 50% plus 1 of the mail ballots returned, again, the votes are weighted. Finally, once a CBD/BID is approved by a weighted majority of returned ballots, the Board of Supervisors must officially approve its formation during a public hearing.

Mayor's Signature

In order for any resolution to become finalized the Mayor needs to sign the resolution. OEWD will lead the process in order to obtain the Mayor's signature. Once the Mayor signs the resolution, the City & County of San Francisco will begin collecting the special assessment from properties within the newly created CBD as part of the property tax bill.

Ongoing Accountability

CBD/BIDs are accountable to property owners, businesses, and residents that provide annual assessment income and participate in district management as volunteers and board members. All board and committee meetings of a CBD/BID are open to the public. CBD/BIDs are also accountable to the public, and provide a mandated mid-year and annual report to the City, and participate in an annual hearing at the Board of Supervisors.

Each year during the CBD/BID's term, there is a 30-day period, beginning on the anniversary date the Board of Supervisors established the district, during which the property owners have the opportunity to request disestablishment of CBD/BID. Within that 30-day period, if a written petition is submitted by those who pay 50% or more of the assessments levied, the CBD/BID may be disestablished by the Board of Supervisors. Further, the Board of Supervisors may initiate disestablishment proceedings at any time with a majority (six members) based on improper actions of the CBD/ BID management corporation.



Appendix #3

San Francisco CBD/BID Assessment Examples

Assessment methodologies vary from one CBD/BID to another. These methodologies consist of assessment rates which are determined by the services provided by the organization. Once a methodology is developed, the formula for calculating the dollar amount owed per property - or calculated assessments - involves applying designated assessment rates to any combination of the following assessment variables: building’s square footage, parcel square footage, and/or frontage linear footage.

San Francisco CBD/BIDs commonly adopt methodologies that create different assessment rates for properties based on their property type, and for larger CBD/BIDs or CBD/BIDs with ample residential uses immediately adjacent to their “main street”, their location. This means that not all properties are assessed with the same assessment rate in one district. Three examples of differing methodologies in San Francisco include Union Square Alliance, Japantown CBD, and Castro CBD.

For Union Square Alliance, their area of coverage includes an area where the most central part of their district experiences many more visitors and greater use than the periphery of the district. This means they believe different services will be needed in this area that has much greater activity. When they developed their most recent assessment methodology, they determined that there would be a Zone 1 - the area with more pedestrian traffic and daily use, and Zone 2 - the area with less pedestrian traffic and daily use. Properties in Zone 1 will receive more services on a daily basis, and as a result, pay a higher assessment rate than Zone 2. Additionally, Union Square Alliance covers a large area and includes properties that are commercial, or non-residential, as well as apartment properties, condominium properties, and public properties. Each of those different types of property uses benefit from the presence of a CBD/BID in different ways. Most importantly, any type of property that is residential or public property may not necessarily benefit from the marketing or other economic development services that an assessment would provide. As a result, the assessment rate may be adjusted accordingly for those properties.

In Japantown, the CBD district does not have the difference in pedestrian traffic that Union Square has in any one particular part of the district. This means that they only need to have one assessment rate they apply to properties in their district. However, Japantown identified that nonprofit properties in their district will benefit from the economic development services that the CBD provides. Their solution to reduce the assessment rate for nonprofit buildings is to reduce their calculation of assessments by 50%.

For the Castro, while they are more similar to Japantown in size, they are a district that has residential land use in their district. This is common with CBD/BIDs that are centered around a singular “main street” in San Francisco and have varying degrees of activity. And like Union Square, they have three areas within the district that range in terms of pedestrian traffic and daily use. To accommodate a variety of spaces within the district in creating assessment rates, the Castro CBD looked at location and property type to develop a fair methodology for each property in the district.

Services	Zone 1	Zone 2
Cleaning Ambassadors	4 Cleanings/Day	3 Cleanings/Day
Overnight Sidewalk Vacuum	Yes	Yes
Pressure Washing	Every Week	Every 2 Weeks
Safety & Hospitality Ambassadors	Min. 4 Visits/Day	Min. 2 Visits/Day
Member Services/Dispatch	24/7/365 Operation	24/7/365 Operation
2 SFPD 10B Officers/Private Security	12.5 Hours of Patrol	7.5 Hours of Patrol
Security Camera Program	Security Camera Program to expand from 60% of the district covered to 100% over the next decade term.	
Overnight Camera Monitoring	10pm-6am	
Overnight Security	Patrol Team (10pm-6am)	

Service/Activity	Zone 1 Factor	Zone 2 Factor	Zone 3 Factor
Cleaning ¹	2.00	1.00	1.00
Power Washing ²	4.00	2.00	1.00
Marketing ³	1.00	1.00	1.00
Landscaping ⁴	1.00	1.00	0.00
Administration ⁴	1.00	1.00	1.00
Factor Totals	9.00	6.00	4.00
Zone Factors	2.25	1.50	1.00

1. Planned for two times per day in Zone 1, and one time per day in Zone 2 and 3.
 2. Planned for two times per day in Zone 1, and one time per month in Zone 2, and once every two months in Zone 3.

3. Same throughout the District
 4. Only provided in public plazas adjacent to or within Zones 1 and 2.

	A. Clean & Safe, Admin., Contingency, Reserve, City Fee (All Parcels)	B. Additional Marking/ Economic Development (For-Profit Parcels only)	C. Total for For-Profit Parcels only (Column A + B = C)
Parcel Square Foot Rate	\$0.17510	\$0.0145	\$0.18960
Building Square Foot Rate	\$0.11993	\$0.0102	\$0.13014

Zone 1 Assessment Rates for FY 2019/20

Land Use Type (Zone 1)	Assessment Rate Per Lot Sq Ft	Assessment Rate Per Building Sq Ft	Assessment Rate Per Frontage Sq Ft
Non-Residential Property	\$0.43727	\$0.06430	\$126.15163
Apartment Property	0.32795	0.04822	94.61372
Condominium Property	0.21864	0.03215	63.07582
Public Property	0.21864	0.03215	63.07582

Zone 2 Assessment Rates for FY 2019/20

Land Use Type (Zone 2)			
Non-Residential Property	\$0.34982	\$0.05144	\$100.92131
Apartment Property	0.26236	0.03858	75.69098
Condominium Property	0.17491	0.02572	50.46065
Public Property	0.17491	0.02572	50.46065

Zone 1

Land Use Type	Rate Per Front Ft	Rate Per Bldg Sq Ft	Rate Per Lot Sq Ft
Non-Residential Property	\$30.23588	\$0.09060	\$0.15079
Residential Property (5+ Units)	\$20.15725	\$0.06040	\$0.10053
Residential Property (1-4 Units)	\$15.11794	\$0.04530	\$0.07540
Non-Profit Property	\$10.07863	\$0.03020	\$0.05026

Zone 2

Non-Residential Property	\$20.15725	\$0.06040	\$0.10053
Residential Property (5+ Units)	\$13.43817	\$0.04027	\$0.06702
Residential Property (1-4 Units)	\$10.07863	\$0.03020	\$0.05026
Non-Profit Property	\$6.71908	\$0.02013	\$0.03351

Zone 3

Non-Residential Property	\$13.43817	\$0.04027	\$0.06702
Residential Property (5+ Units)	\$8.95878	\$0.02685	\$0.04468
Residential Property (1-4 Units)	\$6.71908	\$0.02013	\$0.03351
Non-Profit Property	\$4.47939	\$0.01342	\$0.02234

Land Use Type	Aesthetic Benefit Pts.	Economic Benefit Pts.	Total Land Use Factor
Non-Residential Property	1.00	2.00	3.00
Residential Property (5+ Units)	1.00	1.00	2.00
Residential Property (1-4 Units)	1.00	0.50	1.50
Non-Profit Property	1.00	0.00	1.00

Appendix #4

International Downtown Association Emerging Leadership Fellowship Program

IDA's 2021 Emerging Leaders Fellowship Program Attracts Top Urban Champions

Fellows to learn essential leadership and place management skills

WASHINGTON, DC – The International Downtown Association (IDA) selected 30 of the industry's brightest professionals for the 2021 Emerging Leader Fellowship (ELF) program. These senior staff members hail from 27 cities around North America including Albuquerque, NM; Cambridge, MA; Edmonton, AB; Lincoln, NE; Madison, WI; Oakland, CA; Portland, ME; and Toronto, ON.

Alumni of the IDA Emerging Leader Fellowship program, launched in 2016, are fast becoming sought-after leaders for the future of city building worldwide.

"The success of our Fellowship program underscores how critical this training is to our growing industry," said David Downey, President and CEO of IDA. "This is the only program of its kind created specifically for urban place management professionals. IDA is looking to further illustrate the importance of our industry by elevating leaders with the necessary skills to champion inclusive city building. Professional development remains a hallmark of IDA."

The Emerging Leader Fellowship is a week-long experiential program bringing together a cohort of IDA professionals from within the urban district management industry. The fellows learn essential leadership and place management skills and gain practical tools in the areas of place-based economic development, the live-work-play experience, and public-private partnerships.

"The International Downtown Association is looking to build the future of our industry, and these accomplished executives are the rising stars of our profession," said Downey. "With this program, we're educating and inspiring the next generation of leaders."

This program typically takes place each June in New York City. Due to the impacts of the pandemic, this year's cohort will receive their intensive instruction delivered by IDA partners at Coro New York Leadership Center over a virtual platform. The group will meet in-person in the spring of 2022 where they will continue their learning with professionals from several business improvement district organizations across the city providing technical in-the-field training.

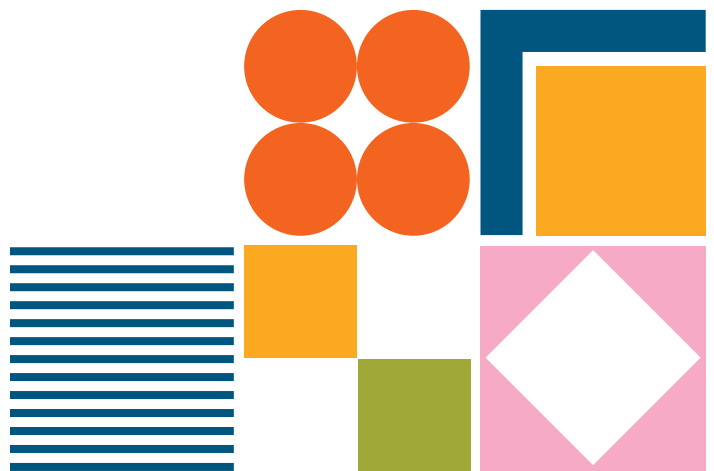
Congratulations to the 2021 Emerging Leader Fellowship cohort! For more information about this year's cohort, visit IDA's website.

About the International Downtown Association

The International Downtown Association is the premier organization for urban place professionals who are shaping and activating dynamic city center districts. Our members are downtown champions who bring urban centers to life, bridging the gap between the public and private sectors. We represent an industry of more than 2,500 place management organizations, employing 100,000 people throughout North America and growing rapidly around the world. Founded in 1954, IDA is a resource center for ideas and innovative best practices in urban place management. For more information and a list of other upcoming IDA events, visit www.downtown.org.

About the Coro New York Leadership Center

Coro New York Leadership Center is New York's premier leadership training organization and a community of over 2,300 alumni across business, government, schools, and non-profits that is shaping our city's future. Coro training helps individuals hone their visions for change and learn how to exercise leadership with greater self-awareness, intention, and effectiveness. We work with leaders, both seasoned and emerging, from many different fields who come to Coro to discover how cities really work and how policy is shaped, while also learning how to collaborate across differences, build culture and community, and make progress on shared challenges. From commissioners and city councilmembers to activists, executives, and entrepreneurs, those who come to Coro build the skills, knowledge, and networks to help them pursue their visions for change with greater effectiveness and impact. Through a series of three leadership training sessions, Coro will provide participants in IDA's Fellowship with a set of frameworks and strategies to help them develop best practices for leading change. Focusing on the personal, interpersonal and systems-level, each session will examine change-making from a different lens and provide new tools, along with experiential activities to test out these new ideas in action.

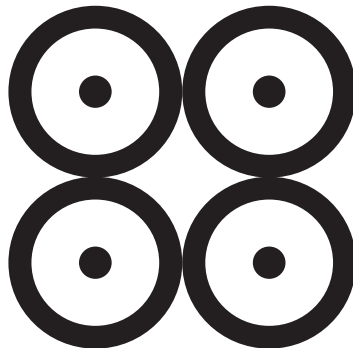
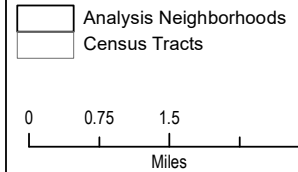


American Community Survey (ACS) Neighborhood Boundaries



San Francisco Analysis Neighborhoods and Census Tracts

The Department of Public Health and the Mayor's Office of Housing and Community Development, with support from the Planning Department, created these 41 neighborhoods by grouping 2010 Census tracts, using common real estate and residents' definitions for the purpose of providing consistency in the analysis and reporting of socio-economic, demographic, and environmental data, and data on City-funded programs and services.



Performance Analysis Glossary

SECTION ONE: PUBLIC REALM AND SAFETY

Cleaning Services: CBD-led services that may include but are not limited to manual street sweeping, litter removal, bulky item removal (or notification of said items), graffiti removal, window cleaning, illegal posting removal, etc.

Landscaping Services: CBD-led services that may include but are not limited to tree trimming, tree removal, tree planting, maintenance of shrubs or other plants in public areas such as parklets or other properties the CBD is responsible for, etc.

Pedestrian and Traffic Safety Services: CBD-led services that assist pedestrians with safely moving along sidewalks, plazas, and across crosswalks. These services may also include signage or other staffing solutions that make moving through the public realm a more positive and safer experience.

Public Safety Services: CBD-led services that may include un-armed Community Ambassadors or Private Security with tools and contact information available to address potentially or actively unsafe situations. Additionally, this may include contracts with the San Francisco Police Department to provide patrol services in the CBD District as well as security camera programs.

SECTION TWO: ECONOMIC DEVELOPMENT

Business Attraction: Outreach, technical support, and partnerships to attract businesses to the CBD district.

Business Retention: Services, outreach, and technical support to ensure that commercial tenants of all kinds are able to stay open and operating in their place of business.

Property Value: The value of real property within the CBD district.

Real Estate Development and Investment: Major transactions within the CBD district that may include but are not limited to private, government, or non-profit entities that conduct property acquisition, property development (new, adaptive-reuse, or tenant improvement construction), major and/or significant tenancies, etc.

Retail and Ground-floor Vacancies: Vacant storefronts or other designated retail space. This includes all forms of vacancies such as short-term, long-term, turn-key, and spaces in need of major repair.

Small Business Support: Efforts that may include but are not limited to technical support, loans, grants, or other types of staffing resources.

SECTION THREE: PLACEMAKING AND PUBLIC ART

Events and Programming: CBD-led or co-led activities that include ongoing or one-off events or programs for the public. The activities could include but are not limited to art, holiday, musical, food, sports or other types of communal festivals, receptions, or gatherings.

Park Activation: CBD-led or co-led efforts that bring additional uses or community enhancements to San Francisco Recreation and Parks parks.

Park Maintenance: CBD-led or co-led maintenance that enhances San Francisco Recreation and Parks department maintenance services including opening and closing the park, setting up equipment, and other functions permitted by the Recreation and Parks department.

Placemaking: CBD-led or co-led initiatives that fundamentally seek to empower community visions for how public spaces can be utilized to strengthen community connection. These initiatives could include strategies for landscape or streetscape design, events, programs, parks, policies, dedicated staff, and any other decisions or actions that reinforce opportunities to turn public spaces into places for people to gather and engage.

Public Art: CBD-led or co-led work to bring art to the public or publicly-visible places in the CBD district. This may include but is not limited to murals, window displays, sculptures or statues, and other art-based installations.

SECTION FOUR: OPERATIONAL AND FINANCIAL PERFORMANCE

Contracted Staff: Individuals or organizations hired by the CBD through an ongoing or one-time contract. This can include but is not limited to cleaning contracts, accounting and legal services, and consultants.

In-house Staff: Individuals hired directly by the CBD and report directly to the Executive Director or a manager within the CBD. These individuals may work full-time or part-time.



SECTION FIVE: COMMUNITY ENGAGEMENT AND ADVOCACY

Advocacy: CBD-led activities or CBD staff, Board, or other representative actions that seek to advance a specific cause, policy, request, or other matter in order to better serve the CBD district's community. This could include but is not limited to letter writing, attending public hearings, public forums with elected officials or government employees, and direct funding requests from public or private entities for a specific matter.

Engagement: CBD-led strategies to develop and sustain working relationships with CBD community members. This can include but is not limited to creating opportunities for community members to regularly participate in events, programs, decision making (one-off or recurring), open houses, public surveys, neighborhood walks, and other types of activities that seek to build community.

Outreach: Communication with individuals, businesses, property owners, and other community groups through in-person and online actions. This may include but is not limited to attendance at non-CBD community meetings, distribution of pamphlets or flyers that pertain to CBD resources or information, and the use of online tools such as the CBD website, newsletters, one-off emails, social media, and other digital platforms.

Online Resources: Information, documents, surveys, or other helpful tools on the CBD website, social media profiles, or newsletters. These are resources that intend to support and inform CBD community members.

SECTION SIX: SOCIAL AND HUMAN IMPACT

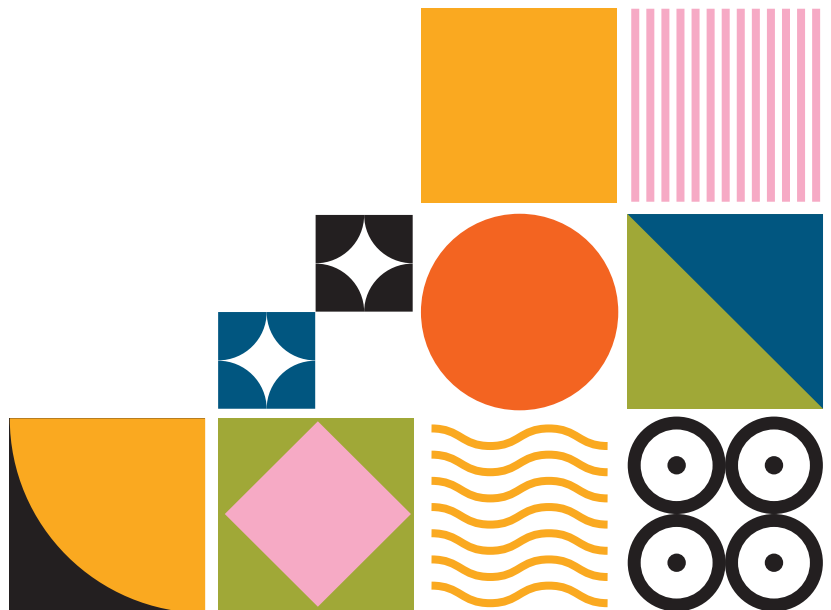
Direct Services: CBD-led or co-led services for people experiencing extreme hardship including but not limited to providing material aid (e.g., food, clothing, first aid), regular escorts to service centers, case management, and employment or ongoing employment support.

Extreme Human Hardships: These hardships may include but are not limited to individuals experiencing homelessness, individuals living with mental health challenges, and individuals experiencing drug addiction. For the purpose of this study, this term seeks to encompass human experiences that are visible or are compounded by dynamics in the public right-of-way, such as sidewalks, parks, plazas, streets, alleys, and the vicinity adjacent to ground floor building entrances. These are experiences that intersect with CBD/BID services and staff most often.

Referrals: Efforts by CBD staff to connect individuals experiencing extreme hardship with City services or other types of services (e.g., non-profit organizations that offer food, drop-in centers for health care/personal cleaning/rest, temporary or permanent housing assistance).

Resources or Monetary Support: CBD resources to aid individuals facing extreme human hardship on a regular basis that include CBD staff commitments (e.g., social worker, case manager) and/or CBD funding (grant funding, donations, assessment funds - if applicable) directed to service-oriented organizations that lead one-off interventions or ongoing interventions in the CBD district.

Service-oriented Organizations: Non-profits or other private organizations whose sole purpose is to provide services for people experience extreme hardship(s).



CBD/BID 2021 Assessment Revenue & Management Plan Budgets

CBD/BID	Website	2020–21 Submitted Assessment	% Allocation of Budget
Castro	castrocbd.org	\$818,991.62	Cleaning Services 77%, Landscaping <1%, Marketing 1%, Administration and Contingency 31%
Civic Center	sfciviccenter.org	\$3,178,521.86	Clean/Safe/Activation 75.31%, Marketing/Communication 7.53%, Administration/Contingency 17.16%
Discover Polk	discoverpolk.org/about	\$635,238.70	Environmental enhancements account for 67.2% of the annual DPCBD budget. Economic enhancements account for 12.0% of the annual DPCBD budget.
Downtown	downtownsf.org/ district-overview	\$4,005,975.14	Civil Sidewalks/Mobility Management 77.45%, District Identity, Marketing and public space development and management 5.16%, Program Management 14.20%, Contingency 3.19%
East Cut	theeastcut.org	\$4,316,673.80	Public Safety 39.3%, Cleaning and Maintenance 25.1%, Parks and Greenspace 13.8%, Communication and Development 3.2%, Management 5.9%, Operations 12.9%
Fisherman's Wharf	fishermanswharf.org	\$1,218,900.68	Public Rights of Way and Sidewalk Operations 29%, District Identity and Streetscape Improvements 40%, Administrative/Corporate operations 20%, Contingency/Reserve 11%
Japantown	jtowncbd.org	\$393,750.30	Environmental Enhancements 31.25%, Economic Enhancements 48.75%, Advocacy/Administration 17.50%, CBD Reserve 2.50%
Lower Polk	lowerpolkcbd.org	\$897,553.68	57% for cleaning, safety, and maintenance, 28% for operations and management, 11% for district identity, marketing, branding and events, 4% for contingency and reserves
Mid Market	midmarketcbd.org	\$1,694,614.78	28.7% for cleaning and maintenance, 35.2% for public safety, 24.6% for economic development, marketing/promotion, management, 11.5% contingency
Noe Valley	noevalleyassociation.org	\$248,541.48	Public Rights of Way and Sidewalk Operations (PROWSO) 70%, District Identity and Streetscape Improvements (DISI) 9%, Administrative/Corporate operations 14%, Contingency/Reserve 7%
Ocean Avenue Association	oceanavenueassociation.org	\$339,580.72	Cleaning, Maintenance, and Safety Program 51.65%, Marketing, Streetscape Improvements, and Beautification Program 18.04%, Management and Operations 26.03%, Contingency and Reserves 4.27%
SOMA West	somawestcbd.org/ about-swcbd	\$3,859,195.14	Public Rights of Way 79.25%, Marketing, Streetscape Improvements, and Beautification Program 7.14%, Management and Operations 9.09%, Contingency and Reserves 4.50%
Tenderloin	tlcbd.org	\$2,043,877.62	Clean and Safe 66.77%, Marketing and Economic Development 15.55%, Administration 15.21%
Union Square Alliance	visitunionsquaresf.com	\$6,019,719.24	Clean & Safe 74%, Public Realm, Marketing Events, & Advocacy 12%, Management & Admin. 14%
Yerba Buena	ybcbd.org	\$3,151,268.96	Cleaning and Streetscape Improvement Activity Costs 40.7%, Safety and Security Activity Costs 32.5%, Branding, Activation, and Marketing Activity Costs 13.8%, Management and Operations 13%

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