

ONE TREASURE ISLAND

# Growing an Equitable Park System

September 10, 2025



# Executive Summary

## Why This Matters

- Parks are central to creating an equitable, vibrant community.
- Surveys show high demand for activation: movies, concerts, nature walks, food events.
- Current roles and funding leave gaps in programming, marketing, fundraising.

## Key Findings

- Projected visitation: 3–5M annually once park system is built out.
- SF and peer cities rely on nonprofit partners for ~5% of park funding.
- TI/YBI needs consistent activation to serve both residents and regional visitors.

# Executive Summary: Recommended Approach

- **2026–2028+ (Pilot Phase)**
  - **Expand programming and activation**
  - **Expand marketing and promotions**
  - **Scaffold from existing organizations** (existing nonprofit and/or TIDA)
  - Convene **5–8 person working group** (TIDA, SFRPD, OneTI, partners)
- **By 2038 (Full Buildout)**
  - Transition to a **standalone TI/YBI Parks Nonprofit**.
  - Scale programming, equity initiatives, and fundraising capacity.
- **Next Steps**
  - Confirm **interim governance model** (Fall 2025).
  - Secure startup funding & hire **Public Programs Manager** (by 1/2026).
  - Begin programming as a pilot phase while nonprofit model develops

# Scope of the Study

## Park User Assessment & Strategy

- Info on future park users and anticipated demand
- Explore social goals to encourage equitable park use

## Opportunities & Constraints for Nonprofit Partnerships

- Survey the economic viability of nonprofit, philanthropic, and/or grant support of equitable park programming and use

# Process and Timeline





# Assets, Issues and Opportunities





# Park System Growth Stages

- 2025-2038
- 2038 on:
  - Urban Farm
  - Sports Park
  - Northern Shoreline Park/ The Wilds
  - Expansion of Cityside Park



Figure 1.3.e: Open Space Framework

# Parks Roles and Gaps

- Parks Maintenance
  - Rubicon, Toolworks for restrooms & SFRPD contract under negotiation
- Parks Programming and Activation
  - Some offerings by One TI, TICD and other organizations
  - Regular activation and programming needed for both residents and visitors
  - Potential for activation through park ambassadors and volunteers
- Fundraising and Resource Development
  - No parks-specific fundraising currently





# Survey: Resident Highlights

- Top reasons for visiting parks
  - Walking, biking, hiking
  - Nature viewing
  - Meeting friends/family
  - Sightseeing
- Top programs
  - Food and beverage events
  - Outdoor movies or concerts
  - Music festivals
  - Arts activities





# Survey: Visitor Highlights

- Top reasons for visiting parks
  - Walking, biking, hiking
  - Nature viewing
  - Activities/facilities offered by Island providers
- Top programs: visitors
  - Guided nature walks
  - Food and beverage events
  - Arts activities
- Top recreation amenities: visitors
  - Social spaces and amenities
  - Lawn areas
  - Food and drinks vendors
  - Rental bikes and kayaks





# Visitor Market Segments & Park Typologies

	TI-YBI Residents	SF Bay Area Residents	Tourism: Domestic and International
Dog Park	●	◐	○
Urban Farm	●	●	○
Plaza	●	●	●
Garden/Scenic /Trails	●	●	●
Sports	●	●	○
Neighborhood	●	●	○



# Key Programming Opportunities

- Focus on residents and SF/Bay Area visitors for the next 10 years.
- Develop a consistent calendar of programs and activities, building on current resources (e.g., OneTI, TICD, Museum, Sailing Center, Bay Padel, YMCA).
- Provide waterfront activation/programming.
- Increase visitor information and wayfinding.
- Market and promote TI/YBI as a destination day trip for the region.
- After 2038, make TI/YBI a destination for nature and environmental programs.



# Example: Waterfront Activation



Sailing Center,  
Cityside Park



Surrey Bike Vendor,  
Golden Gate Park,  
SF



Destination  
Play Area,  
Presidio Trust





# Cityside Park as a Programming Venue





# Nonprofit Partnerships





# Park Partnerships at a Glance

- There are ~230 park nonprofits operating in the 100 largest US cities.
- They raise and spend \$800 million annually.
- This is approximately 5% of total park spending across the US.
- On average, these park nonprofits:
  - Have 5 employees
  - Spend ~\$600,000 annually on average
  - Work collaboratively with public park agencies and other public agencies





# City Park System Funding

City	Rank in per capita spending (Parkscore rank)	Per Capita Spending	Total Spending	Percentage from nonprofits*
Irvine	1 (2 in ParkScore)	\$681	\$115.9 million	0%
San Francisco	2 (6 in ParkScore)	\$561	\$399.8 million	6%
Seattle	3 (8 in ParkScore)	\$418	\$332.5 million	5%
Washington, DC	4 (1 in ParkScore)	\$393	\$272.4 million	7%
Minneapolis	5 (3 in ParkScore)	\$324	\$145.5 million	2%
Arlington, VA	6 (7 in ParkScore)	\$301	\$76.9 million	0%
Portland, OR	7 (9 in ParkScore)	\$274	\$195.6 million	1%
Atlanta	8 (21 in ParkScore)	\$272	\$166.9 million	20%
Frisco, TX	9 (37 in ParkScore)	\$258	\$59.9 million	0%
St. Paul	10 (5 in ParkScore)	\$248	\$83 million	1%
Oakland	36 (44 in ParkScore)	\$162	\$73.2 million	6%





# West Coast Cities

City	City Budget in Billions	Parks % of City Budget	Total Parks Spending in Millions	# of Nonprofits	% from Nonprofits	ParkScore 2025 Rank	Per Capita \$ Rank
San Francisco	\$15.9 B	1.6%	\$255.9 M	4	6%	6th	2nd
Oakland	\$1.89 B	4.0%	\$75.3 M	1	5%	44th	36th
Seattle	\$8.5 B	2.6%	\$332.5 M	4	5%	8th	3rd
Portland	\$8.2 B	2.1%	\$195.6 M	4	1%	9th	7th
San Jose	\$6.1 B	1.9%	\$119.3 M	4	1%	41 <sup>st</sup>	56th

# Roles for a Nonprofit on TI/YBI

## Key Relationships

- Work in partnership with TIDA and SFRPD
- Manage any contractors
- Cultivate partnerships with on-Island organizations and community members
- Develop nonprofit Board with the needed expertise

## Key Opportunities

- Programming
- Park activation
- Marketing and promotions
- Volunteering
- Fundraising for operations and capital
- Equity
- Community Engagement

# Nonprofit Parks Organization Models

Model	Example	Applicability to TI/YBI
Standalone park nonprofit	Many local examples including Golden Gate National Park Conservancy	Yes
Business improvement district	Civic Center Community Benefit District/Civic Center Park	No
Property / homeowners associations	Mueller Austin	No/Maybe
Development corporation and similar structures	Brooklyn Bridge Park, Governors Island Park in NYC	Yes/Maybe
Other nonprofit or cultural organization	Grand Park/The Music Center in LA	Yes/Maybe

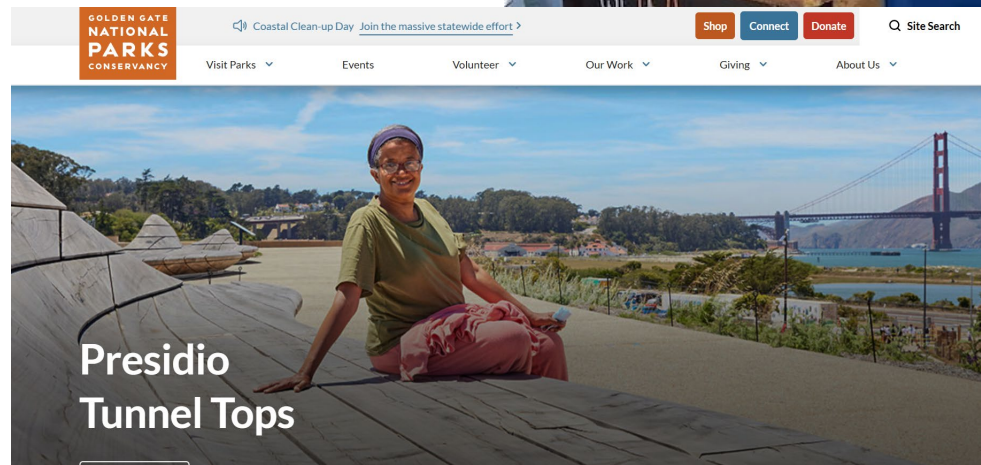
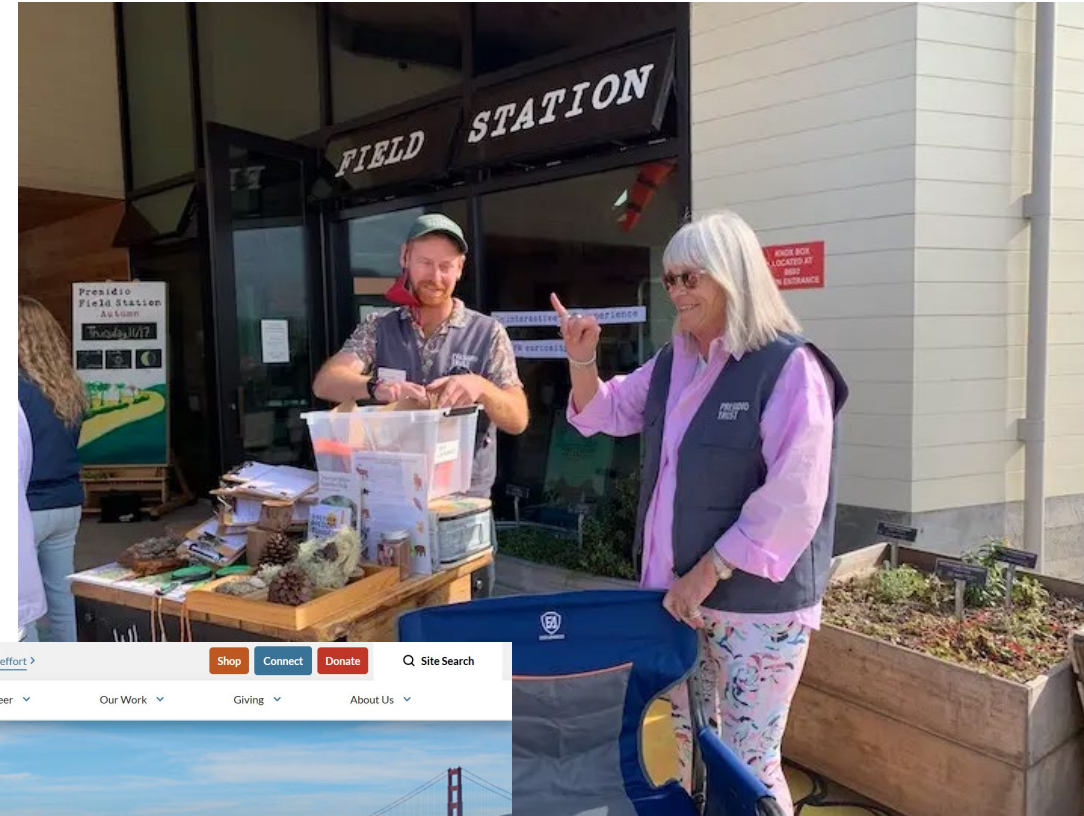


# Golden Gate National Park Conservancy

GOLDEN GATE  
NATIONAL  
PARKS  
CONSERVANCY

Federal Agency (Presidio Trust), National Park Service, parks nonprofit (GGNPC)

- Supports multiple sites in GGNRA including Alcatraz, Crissy Field, Muir Woods and The Presidio
- Provides programs, visitor services, capital projects and conservation
- \$60 M annual budget



# Governors Island, NYC

Quasi-state agency (Trust for Governors Island), parks nonprofit, NPS owned historic fort

- **172-acre** park, 800 yards from Manhattan, even closer to Brooklyn
- Extensive park and amenities, designed for sea level rise
- Businesses and nonprofits use repurposed buildings
- State driven Climate Center being realized
- **\$60 million** combined budget (FY 24)
- **970,000 visitors** in 2024. (95 events)
- **2,900 volunteers**, 14,500 hours in 2024





# Grand Park, Downtown Los Angeles

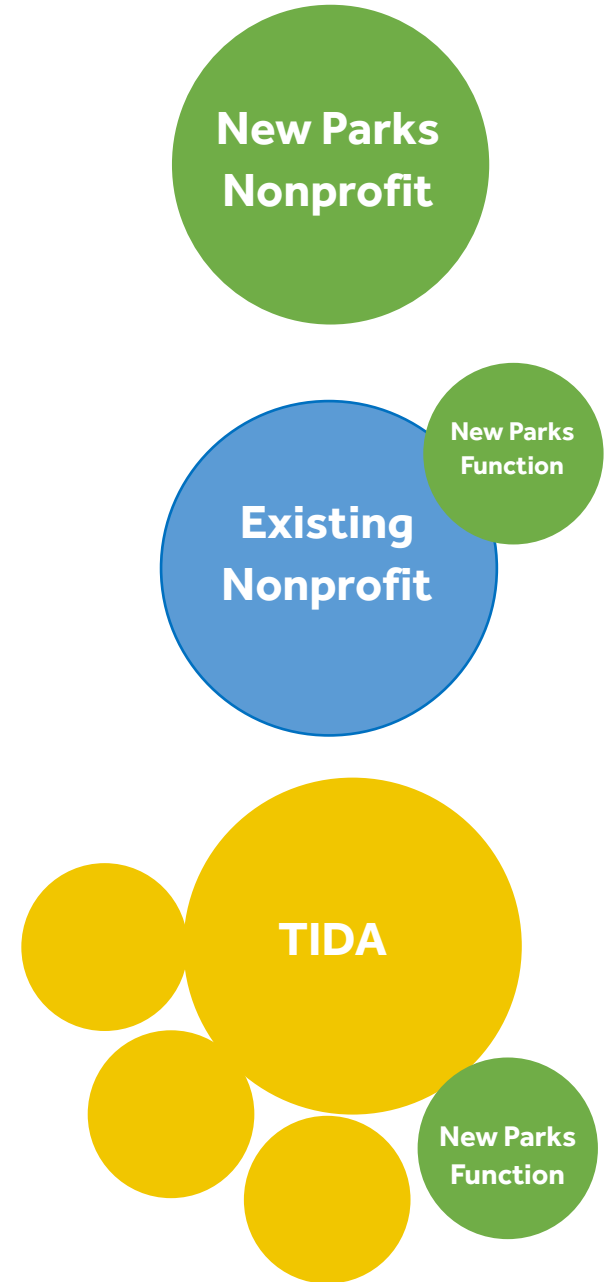
Public/private partnership between LA County and The Music Center (nonprofit)

- Developed by Joint Agreement (City/County) funded by \$50 M fee for downtown parcel development.
- Operated by the The Music Center, an \$80 million non-profit performing arts organization that operates theaters.
- \$7 M annual budget, park included in county budget cycle
  - **80%** of funding from LA County
  - **20%** from sponsors, donations and rentals, any additional funding goes to free programming, per lease agreement.
  - 2 concession spaces, 1 controlled by County



# Options for a TI/YBI Nonprofit

1. New Stand-alone Nonprofit
2. Superset of Existing Nonprofit
3. Expanded TIDA Role (with Focused Fundraising Nonprofit)





	1. New Standalone Nonprofit	2. Superset of Existing Nonprofit (OneTI)	3. Expanded TIDA Role (with Fundraising Nonprofit)
<b>Considerations</b>			
<b>Programming Startup</b>	Moderate-Hard	Simple	Simple
<b>Park Activation Startup</b>	Moderate-Hard	Simple	Simple
<b>Volunteering Program</b>	Moderate-Hard	Moderate	Hard
<b>Fund Development</b>	Moderate-Hard	Moderate	Hard
<b>Community Engagement</b>	Moderate-Hard	Simple	Simple-Moderate
<b>Equity Focus</b>	Moderate-Hard	Simple	Moderate
<b>Job Training/Workforce Development</b>	Hard	Simple-Moderate	Moderate
<b>Board Development</b>	Moderate	Simple-Moderate	Hard
<b>Increased Marketing/Promotions</b>	Simple	Moderate	Moderate
<b>Relationships with Project Partners</b>	Moderate	Simple	Simple
<b>Available Organizational Infrastructure</b>	Moderate-Hard	Simple	Simple-Moderate
<b>Timeline and Cost for Startup</b>	Moderate	Simple	Simple-Moderate
<b>Organizational Scalability</b>	Simple	Hard	Hard

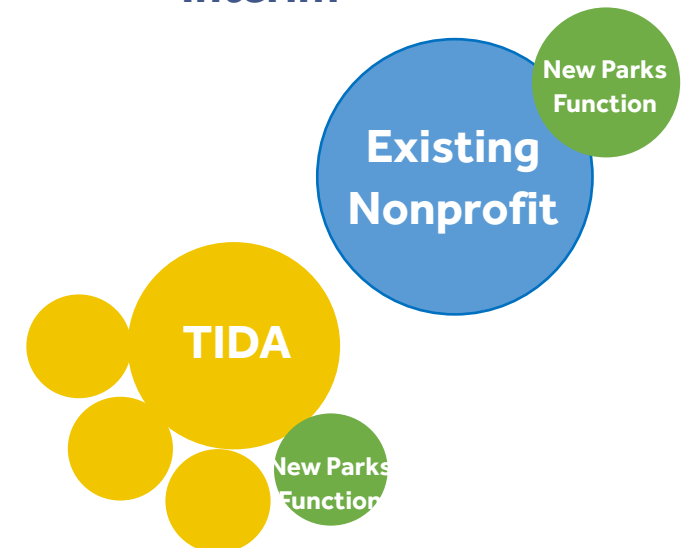
# Recommended Approach

- We recommend a **standalone nonprofit** focused on parks **as the long-term goal** (Option 1)
  - Allows strategic focus on an equitable and world class park system.
  - Proven approach.
  - Local nonprofit landscape can support another nonprofit.
- In the interim, we recommend **scaffolding on existing entities** (Options 2 or 3) to allow programming and activation to begin as quickly as possible.

Long Term



Interim



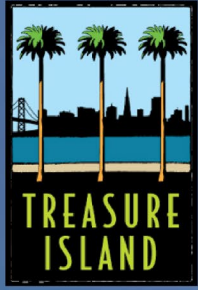


# Recommended Next Steps

- **Prioritize expanding programming** as soon as possible, for the 2026 peak summer season. This means hiring a **Public Programs Manager**.
- **Establish the “Working Group”** to oversee the implementation of parks programming and coordinate during the development of the nonprofit, including representatives from TIDA, SFRPD, OneTI, and other partner organizations, no more than 5-8 people in total.
- **Formalize the pilot phase** to test public programming over the next three years.
- **Begin governance activities** to create a new nonprofit.

# 3-Year Action Plan

Immediate	Year 1 (2026)	Years 2 and 3 (2027-2028)
Confirm preferred model	Governance development	Complete governance activities
Secure funding for and hire Public Programs Manager	Working group meets regularly	Complete TIDA and SFRPD agreements
Analyze existing programs and lessons learned	Programming and activation (Public Programs Manager leads)	Working group may phase out
Working group coordination on participation data tracking	Begin marketing and promotions	Revisit staffing needs and adjust as required
Establish budget and goals for Years 1 and 2	Begin fundraising (sponsorships)	Grow programming and activation
	Use the Equity tool to guide programming decisions	Grow fundraising
		Expanded marketing and promotions



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