



# SAN FRANCISCO

Office of Economic and Workforce Development

## Impact Analysis of San Francisco's Property & Business Improvement Districts (CBDs/BIDs)

Fall 2012





## **Impact Analysis of San Francisco's Property & Business Improvement Districts (CBDs/BIDs)**

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Stanley Ellicott and Lisa Pagan | Fall 2012

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# Foreword

From Report Authors, Stanley Ellicott & Lisa Pagan

San Francisco is a city defined by its neighborhoods. At the core of each neighborhood is a cluster of small businesses that form a commercial district and a public living room—an environmentally diverse center radiating personality and culture. It is within these public living rooms that people come together for entertainment, to relax, shop, or to get chores and business done. And by doing so, San Franciscans build community by spending time with one another, frequenting local businesses, restaurants, cafes, bars, cultural and religious institutions, public open spaces, farmer's markets and festivals.

In neighborhood commercial districts small businesses employ persons from diverse racial and cultural backgrounds, with a sundry of languages and education levels. Small businesses represent their diverse patrons by providing the culturally relevant goods and services they seek, meanwhile generating sales taxes and fees that support social and municipal services in the community.

Yet despite the profound impact San Francisco's neighborhoods have in shaping the culture and impression of the City, it is challenging to fund revitalization and local economic development programs within these regions, as philanthropic programs to support small business districts are few.

Based on an understanding that neighborhood mixed use areas must be better supported, and a desire to create new or more accessible tools to catalyze neighborhood revitalization and development, in 2004 San Francisco's Board of Supervisors and then Mayor Gavin Newsom approved a local ordinance and funded a new program to achieve these goals. The ordinance augmented the state law requirements governing property and business improvement districts and reduced the petition threshold required by the state to form assessment districts commonly referred to as Community Benefit Districts (CBDs) in San Francisco (Article 15 of the San Francisco Business and Tax Regulation's Code SEC. 1511).

That same year, a complimentary technical assistance program for property and business improvement districts was developed in the newly formed Office of Economic and Workforce Development neighborhood economic development division. The technical assistance program was designed to create the programmatic infrastructure within the City, and support in the form of grants, city staff assistance, and outreach to community groups to foster utilization of the new ordinance and technical assistance program to form and run neighborhood-based BIDs/CBDs.



A community guide in the Central Market CBD distributing information.



Since the program's establishment in 2004, San Francisco has seen impressive growth in locally managed property and business improvement districts from a single district to ten. Two of three established districts reached the expiration of their term and renewed. One such district, the original Union Square BID, formed before San Francisco's technical assistance program began, tripled in size during the renewal process. Only a single district sunset after its first 5 year term ended in 2011.

As of August, 2012 ten CBDs/BIDs are currently dispersed throughout San Francisco's downtown and neighborhood commercial areas. Combined annual direct assessment investment in neighborhood-based CBD/BID districts has increased from \$1 million per year in 2004 to over \$9 million per year in 2012.

We are pleased to present the following impact analysis of San Francisco's property and business improvement districts. The analysis draws on statistical data that enable progress measurement of following goals of the CBD/BID technical assistance program:

- Improvement of public realm cleanliness
- Improvement of public safety
- Creation of economically viable neighborhood business districts
- Financial sustainability of district management organizations with capacity to leverage additional investments
- Investment in and improvements of the district's physical environment
- Increased number and quality of events, marketing and district promotion
- Increased community participation, leadership and coordination

**Stanley Ellicott & Lisa Pagan**



Lit trees in the Fisherman's Wharf CBD.



# Executive Summary

Property & Business Improvement Districts (PBIDs), also referred to as Business Improvement Districts (BIDs) or Community Benefit Districts (CBDs) are public/private partnerships in which property and or business owners elect to make a collective contribution to the maintenance, development, and promotion of their mixed use neighborhood through a special assessment to their property or business.

The CBD/BID model is a revitalization strategy to invigorate or renew commercial districts. Property and business owners pay special assessments to create a stable revenue source for the provision of supplemental activities and improvements within district boundaries, including public realm cleanliness, public safety, beautification, streetscape improvements, marketing, promotions, district advocacy and other economic development activities. By attracting pedestrians, commercial activity, and new businesses, district investments begin to stimulate depressed, or underperforming commercial regions. And through revitalization, outcomes emerge which directly benefit property and business owners, and improve the district as a whole: higher revenues for district merchants; stabilization or growth in property values; new jobs; and streets that are safer and cleaner than before.

In San Francisco, BIDs emerged in 1999 with the founding of the Original Union Square BID. The program has grown rapidly following the creation of the Office of Economic Workforce Development, and a technical assistance program designed to incubate this innovative economic development strategy in 2004. Today there are 12 San Francisco-based CBD/BID districts that represent the diversity of the City's vibrant neighborhood commercial corridors, including Greater Union Square, North Market/Tenderloin, Fisherman's Wharf Landside & Portside CBDs, Noe Valley, Castro/Upper Market, 2500 Block Mission, Central Market, Yerba Buena, Ocean Avenue, Civic Center, and the Tourism Improvement District.

Of the 12 CBDs/BIDs legally established as of June 2012, 11 are focused on specific geographic areas within San Francisco, while one district, the Tourism Improvement District (TID), was formed to support improvements to the Moscone Convention Center, and increase hotel bookings by promoting San Francisco's tourism industry. In the 2010-2011 fiscal year, the TID generated \$21M in assessment income from hotels across the city to fund its services and investments. Together, the 11 place-based districts, which are the focus of this report, cover nearly 3% of San Francisco by land area, sustain more than 60 full-time jobs, and invested \$9.9M in the 2011-2012 fiscal year to improve their neighborhood commercial regions.

District profiles are provided on pages 29-39 and include important referential information on boundaries, demographics, assessment income, and service menus.



Significant work has been done to project outcomes CBDs and BIDs are believed to influence within their regions, however, these projections are rarely tested by linking CBD/BID investments to actual outcomes. Accordingly, in Spring 2012, the Office of Economic and Workforce Development undertook an evaluation of the CBD/BID Technical Assistance Program to measure the progress of San Francisco's 11 place-based assessment districts in meeting program goals. The objective of this effort was to understand the impacts CBDs/BIDs have on their geographies, and to assess those results directly with quantifiable measures.

This analysis focuses on CBDs and BIDs which have administered services for more than five fiscal years, and whose services are targeted within a specific geographic neighborhood of San Francisco. The study primarily examines the following 11 districts: Union Square BID, which expanded into the Greater Union Square BID in 2009, North Market/Tenderloin, Fisherman's Wharf Landside & Portside (studied jointly), Noe Valley, Castro, 2500 Block Mission, Fillmore, Central Market, and Yerba Buena.

To conduct the evaluation, data were gathered from City agencies, external data providers, Certified Public Accountant audited financial statements, and a survey instrument administered to CBD/BID Executive Directors. These data were then used to assess impacts, describe results, and establish trends. From that work, several key findings emerged:

- **Following service implementation, on average, CBDs/BIDs outperformed citywide trends on the majority of studied indicators, including public realm cleanliness, public safety, and economic resiliency.** The diversity of positive outcomes and trends, when aggregated, serve as a clear demonstration that CBD/BID services and investments have a measurable impact on higher-level outcomes.
- **On average, CBD/BID-maintained streets were found to be cleaner than similar commercial streets located in the same Supervisorial District.** This evidence suggests that supplementary CBD/BID street cleaning services have a measurable impact on public realm cleanliness.
- **CBDs/BIDs have experienced declining crime prevalence similar to current citywide trends.** After implementing services, crime levels decreased in CBD/BID regions 68% of the time.
- **CBDs/BIDs were insulated from the effects of the 07/09 recession.** Specifically, they retained more value in their properties, saw less significant reductions in sales tax revenues, and maintained lower commercial vacancy rates than what was experienced across San Francisco.
- **CBDs/BIDs have raised significant revenues from non-assessment sources.** Since the CBD/BID program was first established, districts have invested \$57.3M in neighborhood revitalization and economic development. \$7.4M or 12.9% of all CBD/BID income was generated

Select data and charts are provided on pages 40-42.



from non-assessment sources, including grants, donations, and in-kind support, far surpassing current mandates ranging from 1%-5% by district.

- **CBDs/BIDs leverage significant community leadership to support their work**, including 145 dedicated board members and 732 active community leaders, who participate in committees, run events and administer programs.
- **The scale of CBD/BID operations is correlated with the level of improvement**, in that districts with greater resources are more likely to significantly influence outcomes. Assessment budgets appeared to be an important driver of outcomes, suggesting that larger investments are more likely to yield desirable outcomes, or a desirable outcome of greater magnitude. However, larger districts face a trade-off between scale and increased bureaucracy, particularly in managing a larger population of property and business owners with varying interests.

In summary, the data and research synthesized through OEWD's evaluation provides robust justification for the continuation of City support for the CBD/BID program, and for making new investments in neighborhood commercial districts, which are essential to the economic vitality of San Francisco.



# San Francisco's CBD/BID Program

## The History of Property & Business Improvement Districts

Property & Business Improvement Districts (PBIDs), also referred to as Business Improvement Districts (BIDs) or Community Benefit Districts (CBDs) are public/private partnerships in which property and or business owners elect to make a collective contribution to the maintenance, development, and promotion of their mixed use neighborhoods, that may contain both commercial and residential properties, through a special assessment to their property or business. For the purpose of this report the term “CBDs/BIDs” will be used to reference the population of legally established BIDs located in San Francisco.

The business improvement district model first emerged in 1969 in Toronto, Canada, and arrived to the United States in 1974 (Morcol, 2008). Its development was preceded by years of private-sector efforts to revitalize urban commercial districts. These organizing efforts first began as voluntary membership associations among business and property owners to address the challenges pressed on urban commercial centers by growing suburbanization.

In the 1950s, families, businesses and commercial activity began migrating out of urban centers to nearby suburban communities, compelled by mass construction of new single-family homes following the World War 2 baby boom, highway expansion, and decreases in the cost of car ownership. In these suburban communities, new forms and environments of suburban retail emerged, including the strip mall, while businesses relocated their downtown operations to office parks surrounded by acres of parking spaces. Suburbanization and out-migration left urban centers neglected, and declining tax bases made it difficult to deal with growing crime and poverty that quickly reshaped public perception of cities as dirty and unsafe. Urban renewal projects and investments in social services attempted to stem these effects, but they were unsuccessful in fully restoring urban communities.

During this period, voluntary membership organizations—business owners associations and downtown councils—used marketing and promotional activities, such as fairs, window displays, parades, and coupon books, in an attempt to restore declining commercial activity and maintain property values in their districts. As these associations matured, organizers recognized that many property owners within their districts reaped benefits from the collective effort, but did not contribute to the activities or financing that kindled growth in retail sales and commercial property values.

CBDs are public/private partnerships in which property and or business owners elect to make a collective contribution to the maintenance, development, and promotion of their mixed use neighborhood through a special assessment to their property or business.

For the purpose of this report the term “CBDs/BIDs” will be used to reference the population of legally established assessment districts located in San Francisco pursuant to the State of California, Business Improvement District Law of 1994, and Article 15 of the SF Business and Tax Regulations code.



In the 1960s in Toronto, Canada, business owners coalesced around a formal membership organization to eliminate the free rider problem (Morcol, 2008). Given existing financial contributions made by local businesses to pay for new services and programming, organizers explored a legal framework to levy an additional assessment on business owners within the district. In 1969, the enabling legislation was passed in Toronto. In five years time, the business-based assessment district model arrived to the United States in 1974.

## The Emergence of BIDs in California and San Francisco

Business based special assessment districts focused on commercial district revitalization, first emerged in California with the Parking and Business Improvement District Law of 1989, which allowed cities to establish parking and business improvement areas as a way to levy assessments on business owners. These assessments could then be used to finance a limited range of improvement activities. To counteract the shortfalls of the 1989 law, the Downtown Economic Improvement Coalition lobbied successfully for a supplemental statute allowing for both property and business-based assessments, and an expanded list of authorized expenditures necessary to address the multidimensional challenge of improving urban centers (Olson, R., J., & Keys, L, 2008). Following the passage of the California Property and Business Improvement District Law of 1994 (California Streets and Highways Code 36600 et seq.), property-based special assessment districts focused on commercial district improvements emerged in California.

In 2004 The City and County of San Francisco, acting under its authority as a Charter City, augmented the CA Property and Business Improvement District Law of 1994 with the passage of Article 15 of the San Francisco Business and Tax Regulations Code. Article 15 lengthened the initial term that a district could be in place from 5 to 15 years and lowered the weighted petition threshold required to initiate the legislative approval process and the special ballot election from 50% to 30%. 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. Prior to 2004, San Francisco had only one PBID district in the Union Square neighborhood, but in 2005 alone, 5 new districts were established. Rapid growth of PBIDs in San Francisco, locally referred to as Business Improvement Districts (BIDs) or Community Benefit Districts (CBDs), continued through 2008, when a total of 10 districts were in operation. As of the issuance of this report in 2012, 12 CBD/BID districts have formed in San Francisco, representing the diversity of the City's vibrant neighborhood commercial corridors.

Augmentation of Article 15 of the San Francisco Business and Tax Regulations Code, combined with a new technical assistance program provided by OEWD, was instrumental in easing the formation process for new PBID districts in San Francisco.



CBDs/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 and or business assessments.
- A portion of the annual services budget may also be required to come from non-assessment revenues based on an analysis of the separation and proportionality of general benefits from the special benefits conferred onto the parcels and businesses assessed. The formation of a district requires petition support from property and business owners responsible for contributing at least 30% of the total assessment budget.
- Following the petition process, a special ballot election 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 merchants 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.



Street furniture in the Castro/Upper Market CBD is maintained.



## San Francisco's CBD/BID Timeline



- 1994**  
California Streets and Highways Code 36600 § “Property and Business Improvement District Law of 1994” is passed, enabling district formation of both property and business based assessment districts in California
- 1999**  
Union Square, San Francisco’s first CBD/BID is established for a five-year term
- 2004**  
Article 15 of the San Francisco Business and Tax Regulations Code is passed, lengthening district terms from 5 to 15 years and lowering the weighted petition threshold required to initiate the legislative approval process and the special ballot election from 50% to 30%  
  
The Mayor’s Office of Economic and Workforce Development is established; the Union Square CBD/BID is renewed for an additional five-year term
- 2005**  
Five new districts are formed: 1. Tenderloin/North Market, 2. Noe Valley, 3. Fisherman’s Wharf (Landside), 4. Castro/Upper Market, 5. Mission Street
- 2006**  
Three new CBDs/BIDs are legally established: 1. Fillmore, 2. Central Market, 3. Fisherman’s Wharf (Portside) – the Fisherman’s Wharf Portside & Landside CBDs are operated under one unified management corporation
- 2008**  
The Yerba Buena CBD and Tourism Improvement Districts were formed
- 2010**  
The Ocean Avenue CBD is established
- 2011**  
The Fillmore CBD expires and the Civic Center CBD is established
- 2012**  
CBD/BID program evaluation is conducted

## Model and Theory

The CBD/BID model is a revitalization strategy to invigorate or renew commercial districts. Property and business owners pay special assessments to create a stable revenue source for the provision of supplemental activities and improvements within district boundaries, including public realm cleanliness, public safety, beautification, streetscape improvements, marketing, promotions, district advocacy and other economic development activities. By attracting pedestrians, commercial activity, and new businesses, district investments begin to stimulate depressed, or underperforming commercial regions. And through revitalization, outcomes emerge which directly benefit property and business owners, and improve the district as a whole: higher revenues for district merchants; stabilization or growth in property values; new jobs; and streets that are safer and cleaner than before.

Improving properties, businesses, and commercial viability is a primary district motivation, but other outcomes, which underscore the ambition of transforming commercial corridors into vibrant mixed-use districts with high standards of livability, benefit a broader community. Public realm cleanliness, safety, streetscape improvements, and beautification efforts directly improve the conditions within districts that influence their desirability as a place to shop, visit and live.

Districts are situated to respond to a broad array of problems and constituent concerns, given their unique focus on a specified geography, most often a neighborhood commercial district or corridor. Further, given that CBDs and BIDs are managed by nonprofit organizations, they can receive donations, apply for grants and leverage in-kind support to fund new initiatives and projects beyond the services specified in their management plan. By underwriting these investments, districts hope to shape long-term outcomes, such as enhanced cleanliness and public safety, low vacancy rates in the retail district, capital improvements, new public open space and community development.

Districts also play a vital role in municipal governance by establishing policy partnerships with local governments and influencing the development of their regions. In San Francisco, CBD/BID Executive Directors work closely with constituents and represent their concerns to city policymakers, through direct contact with Supervisors, or with the support of OEWD.

Districts are equipped to respond to a broad array of problems and constituent concerns, given their unique focus on a specified geography, most often a neighborhood commercial district or corridor.



A Civic Center CBD community service ambassador offers information and assistance.



## Program Goals

San Francisco's Office of Economic and Workforce Development is responsible for overseeing the City's CBD/BID technical assistance program first established in 2004. The potential of the community benefit district as a local economic development and neighborhood revitalization tool is expressed by OEWD's goals for the program:

- Improvement of public realm cleanliness
- Improvement of public safety
- Creation of economically viable neighborhood business districts
- Financial sustainability with capacity to leverage additional investments
- Investment in and improvement of the physical environment
- Increased number and quality of events, marketing and branding
- Increased community participation, leadership and coordination
- Increased pedestrian traffic and transit use

## Formation

Establishing a Community Benefit District is a complicated multi-year effort that requires community planning, engaging local stakeholders and accessing technical resources from the City and County of San Francisco. The process follows several key steps organized in two phases:

### Phase 1:

- Development of a steering committee
- Community outreach to assess support amongst property owners
- Garnering support from District Supervisor
- Hiring a consultant team for outreach and preparation of reports
- Application to OEWD for grant funds
- Development of a services plan and budget
- Development of a boundary map
- Development of an assessment methodology and assessment rates

### Phase 2:

- Creation of a management plan and an engineer's report
- Petition and ballot voting process
- Legislative approval process

In Phase 1, interested stakeholders are organized into a steering committee that oversees formation. Campaign steering committee members include district property owners, merchants and residents, who educate fellow property owners, merchants, residents and neighborhood organizations on the benefits of a CBD/BID and survey those who will be assessed to ascertain if formation is feasible.



Flower baskets installed by the Noe Valley CBD.



A preliminary delineation of the district boundaries is created, taking care to include properties that would generate significant revenue, while also making sure that the mix of properties in the district makes sense and constitutes a unified area. An initial database of property owners is developed including contact information and building data. Property information gathered by the Assessor's Office can be requested from the Office of Economic and Workforce Development.

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 for further study of CBD/BID feasibility.

In Phase 1 it is important to create a preliminary service plan and budget for spending the revenue acquired through the CBD/BID. The types of services paid for by the CBD/BID should be arrived at through a process of surveying to discover the service priorities of the stakeholders within the district and by reviewing the existing City service levels. In addition, the amount of total revenue to be raised by the CBD/BID should be determined through discussions with property and business owners who would become district participants.

At the end of Phase 1, preliminary research and outreach yield a decision to press forward with the district formation process, or to table a new CBD/BID for future consideration. In Phase 2, the steering committee drafts a proposed management plan that includes the following:

- A final delineation of the boundaries of the district, taking care to include properties and or businesses that would generate revenues to support the supplemental services, while also making sure that the mix of property owners and businesses included in the CBD/BID is such that building support remains feasible.
- A finalized service plan and budget.
- A methodology for assessing the properties and or businesses. Assessments on properties or businesses are regularly based on a combination of square footage, lot size, linear frontage, building use or other factors. The guiding principle, however, must be based upon the fact that assessment will confer a special benefit to every parcel or business directly assessed.
- District duration or term.
- Identification of the existing or yet-to-be-formed management corporation and its leadership board composition. In San Francisco, Article 15 of the Business and Tax Regulations Code requires that the Board of Directors of the CBD/BID management corporation must include at least 20% merchants from the proposed district who do not own property in the district.

At the end of Phase 1, preliminary research and outreach yield a decision to press forward with the district formation process, or to table a new CBD/BID for future consideration.



**Petition Phase:** Once the proposed management plan has been written, the steering committee must then obtain sufficient signatures from property owners and businesses being assessed in order to trigger the initial legislative authorization from the Board of Supervisors required to authorize a special election ballot on whether or not the CBD/BID should be established. Per Article 15 of the SF Business and Tax Regulations Code, there must be petition support from assessed businesses and property representing 30% of the weighted vote in the district. Votes are weighted based on the amount of the assessment to be levied on each parcel or business.

**Ballot Phase:** Petitions are submitted to the Board of Supervisors. 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.

## Assessment Methodology

During Phase 1 of the CBD/BID formation process, community outreach is important to first assess the willingness of property owners to agree to district formation, and second, to understand the amount of the annual financial commitment they are willing to make. Determining an assessment methodology requires a careful balance between raising adequate revenues to provide supplemental services, while also being affordable and reasonable to affected property owners.

In San Francisco, assessment methodologies vary in complexity by district. The simplest district assessment methodology relies on a single zone where services are uniformly administered and a straightforward calculation of a parcel's annual assessment by three or four property variables, such as linear frontage (sidewalk frontage), land area, building square feet, and building use. Larger districts often rely on much more complex assessment methodologies that delineate low and high service zones that maintain different rates for the aforementioned property variables. The process is further confounded by special exemptions, rules, and mandates described in each district's management plan.



Power washing in the Castro/Upper Market CBD.



## Assessment Methodology Example

The Greater Union Square BID, San Francisco's largest CBD/BID organization, encompasses 27 blocks and more than 3000 individual properties. Each property owner's assessment is calculated according to the special benefit received from the services provided by the Greater Union Square BID. Accordingly, each property owner is assessed for their proportional special benefit for two categories of services: (1) Cleaning, maintenance and safety services and (2) Marketing, beautification, streetscape improvements and advocacy (non-residential uses only).

Assessments paid by individual property owners are based on linear (sidewalk) frontage, building square footage of non-residential properties, and property usage.

Clean and safe services are funded by a straightforward calculation of linear street footage multiplied by a stable

rate of \$70.58, except for Hallidie Plaza Parcels, which pay a reduced rate of \$3.55. Commercial Property owners pay a flat rate for marketing and advocacy services for each parcel, which increases in cost depending on the size of the parcel, in total square footage.

Figure 1 - Greater Union Square Assessment Methodology

Property Type	Clean & Safe (per Linear Street Foot)	Marketing & Advocacy (per Assessor's Parcel)
Category 1 Property (less than 2,000 building sq.ft.)	\$70.58	\$75.00
Category 2 Property (2,000 - 4,999 bldg. sq. ft.)	\$70.58	\$150.00
Category 3 Property (5,000 - 9,999 bldg. sq. ft.)	\$70.58	\$500.00
Category 4 Property (10,000 - 29,999 bldg. sq. ft.)	\$70.58	\$1,000.00
Category 5 Property (30,000 - 99,999 bldg. sq. ft.)	\$70.58	\$1,250.00
Category 6 Property (100,000 or more bldg. sq. ft.)	\$70.58	\$5,000
Residential Property / Public Property	\$70.58	\$0
Hallidie Plaza Parcels	\$3.55	\$0

Once the district is formed, the assessment methodology cannot be changed to increase assessment income or to reduce the burden on district property owners. The district can only raise annual assessments by exercising a discretionary annual increase to adjust for inflation as outlined in the ratified management plan.

Property owners that were excluded from the original district boundaries cannot join the district between the point of formation and expiration. Some districts provide their services for a fee in these instances. For example, the Union Square BID provided its Clean & Safe program services for a fee to property owners who were not included in the district boundaries, but who desired additional cleaning and safety services. Other property owners who are located on non-contiguous blocks outside of the district's boundaries, for whom this option is not available, must wait until the district begins the reauthorization process, when it can press for inclusion in expanded district boundaries.

Property based special assessments take the form of a line item levy on semi-annual property tax bills. Businesses and parcels not subject to property tax, but are subject to CBD/BID assessments, are billed by the City. These funds are then transferred to the nonprofit management corporation that administers the district services and budget. Non-payment of assessments can result in a secured or unsecured property lien.



Aerial view of the Greater Union Square BID.



## Accountability

CBDs/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. Further, the public has the right to comment on any item on an agenda of the CBD/BID before an action is taking by the Board of Directors. CBD/BID Board of Directors meets on a regular basis to oversee the activities of the organization, vote on key decisions, provide strategic leadership, and evaluate the success of services and activities. CBDs/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.

CBDs/BIDs are accountable to the public, provide mid-year and annual reports to the City, and participate in an annual hearing at the Board of Supervisors.



# Evaluation

## Purpose

In Spring 2012, the Office of Economic and Workforce Development undertook an evaluation of the CBD/BID Technical Assistance Program to measure the progress of place-based assessment districts in meeting goals set forth for the program.

The objective of this effort was to better understand the impacts CBDs/BIDs have on their geographies, and to assess those results directly with quantifiable measures,

To conduct the evaluation, data were gathered from City agencies, external data providers, Certified Public Accountant audited financial statements, and a survey instrument administered to CBD/BID Executive Directors. These data were then used to measure impacts, establish trends and describe results.

## Framework

This analysis focuses on CBDs and BIDs which have administered services for more than five fiscal years, and whose services are targeted within a specific geographic neighborhood of San Francisco. The study primarily examines the following 11 districts: Union Square BID, which expanded into the Greater Union Square BID in 2009, North Market/Tenderloin, Fisherman's Wharf Landside & Portside (studied jointly), Noe Valley, Castro/Upper Market, 2500 Block Mission, Fillmore, Central Market, and Yerba Buena. Profiles for these districts are provided on pages 29-39 and include important referential information on boundaries, demographics, assessment income, and service menus.

District profiles are provided on pages 29-39 and include important referential information on boundaries, demographics, assessment income, and service menus.

Evaluation segments are ordered by program goals. Beginning with data provided by the City & County of San Francisco, we draw conclusions on the relative cleanliness and safety of CBD/BID regions. We then turn to financial data to measure neighborhood economic viability and resiliency, followed by an analysis of the fiscal sustainability of CBD/BID organizations. Using data from a survey of CBD/BID Executive Directors, we then assess investments in and improvement of the physical environment, gauge the quality of events, marketing and branding, and the levels of community participation, leadership and coordination. The report concludes with a brief discussion on analytical limitations.

The Tourism Improvement District known as the “TID” is a BID formed under the CA 1994 PBID Act. The TID differs from the CBDs/BIDs studied



in this report, as it is not focused on improving a specific neighborhood commercial district, rather its services are set up to benefit a business sector—the hotel/tourism industry—across San Francisco. The TID assesses hotels in San Francisco to fund marketing services focused on increasing tourism and hotel bookings. The TID also funds capital improvement renovations to the Moscone convention center. For these reasons the TID was excluded from the analysis included in this report.

## Principle Findings

Several key findings emerged from this study:

- Following service implementation, on average, CBDs/BIDs outperformed citywide trends on the majority of studied indicators, including public realm cleanliness, public safety, and economic resiliency. The diversity of positive outcomes and trends, when aggregated, serve as a clear demonstration that CBD/BID services and investments have a measurable impact on higher-level outcomes.
- On average, CBD/BID-maintained streets were found to be cleaner than similar commercial streets located in the same Supervisorial District. This evidence suggests that supplementary CBD/BID street cleaning services have a measurable impact on public realm cleanliness.
- CBDs/BIDs have experienced declining crime prevalence similar to current citywide trends. After implementing services, crime levels decreased in CBD/BID regions 68% of the time.
- CBDs/BIDs were insulated from the effects of the 07/09 recession. Specifically, they retained more value in their properties, saw less significant reductions in sales tax revenues, and maintained lower commercial vacancy rates than what was experienced in San Francisco.
- CBDs/BIDs have raised significant revenues from non-assessment sources. Since the CBD/BID program was first established, districts have invested \$57.3M in neighborhood revitalization and economic development. \$7.4M or 12.9% of all CBD/BID income was generated from non-assessment sources, including grants, donations, and in-kind support, far surpassing current mandates ranging from 1%-5%.
- CBDs/BIDs leverage significant community leadership to support their work, including 145 dedicated board members and 732 active community leaders, who participate in committees, run events and administer programs.
- The scale of CBD/BID operations is correlated with the level of improvement, in that districts with greater resources are more likely to significantly influence outcomes. Assessment budgets appeared to be an important driver of outcomes, suggesting that larger investments are more likely to yield desirable outcomes, or a desirable outcome of greater magnitude. However, larger districts face a trade-off between

Select data and charts are provided on pages 40-42.



Yerba Buena Live event organized by the Yerba Buena CBD.



scale and increased bureaucracy, particularly in managing a larger population of property and business owners with varying interests.

## Findings by CBD/BID Program Goals

### Improvement of public realm cleanliness

Improving cleanliness in the public realm by maintaining sidewalks, building frontages, outdoor furniture and fixtures, and landscaped areas, is key to attracting pedestrian traffic and beautifying a neighborhood commercial district. These efforts improve perceptions of safety, and the marketability of an area for business attraction and retention. In San Francisco, CBDs/BIDs spend more on cleaning, landscaping and maintenance services than on any other service category. 40¢ of every CBD/BID dollar is used to remove graffiti and tags, sweep sidewalks, provide steam cleaning and scrubbing services in the pedestrian right of way, maintain landscaped areas, and remove litter. CBDs/BIDs contract directly with experienced cleaning and maintenance firms to provide these services.

**The Department of Public Works Street and Sidewalk Maintenance Standards Evaluation** provided street cleanliness observations from four districts: North Market/Tenderloin on Market St., between 5th-10th; Noe Valley on 24th Street, between Church-Diamond; Castro on Market St., between Laguna-Noe; and Yerba Buena on Mission St., between 1st - 4th St. Comprehensive data, including observations from all assessment districts, was unavailable at the time of study. A total of 12 CBD/BID street and sidewalk inspection observations were available from the FY06-07 - FY10-11 period.

- Of the 12 CBD/BID street cleanliness observations, 9 were rated as having cleaner streets, compared to an index of commercial streets in the same Supervisorial District as the CBD/BID.
- 7 CBD/BID street cleanliness observations were rated as having cleaner sidewalks, compared to the district commercial average.
- 7 CBD/BID street observations were rated as having fewer graffiti marks, compared to the district commercial average which had, on average, 12 additional graffiti marks.
- After initiating services, 75% of districts saw improvements in street sanitation scoring results.
- Not a single CBD/BID street cleanliness observation was found to have unacceptable levels of both street grime and sidewalk litter.

**The 2010 San Francisco Street and Sidewalk Perception Study**, explored pedestrians' satisfaction levels with the general cleanliness of the sidewalk and street, and included observations from five districts: Noe Valley, Castro, Greater Union Square, Central Market and Yerba Buena.



Graffiti removal in the Civic Center CBD.

After initiating services, 75% of districts saw improvements in street sanitation scoring results.



- Compared against an index of all commercial streets included in the study, 4 of 5 districts—where data was available for analysis—had higher satisfaction ratings on the following indicators: general cleanliness; sidewalk condition; cleanliness of the street from the curb to the middle of the street; block appearance; presence of litter; and the presence of graffiti.
- When CBD/BID satisfaction ratings were compared to indices comprising commercial streets in their respective Supervisoral District, 50% of the time they received higher scores than the district average.
- The majority of CBD/BID scores that did not overcome district averages, however, were still tightly clustered to those superior rankings.

**DPW Sanitation Service Call History data** was provided for the 2007-2012 period, and included direct service calls and calls routed through the 311 hotline. Service calls initiated for CBD/BID-maintained property were analyzed for the following call types: street and sidewalk cleaning, illegal dumping, steamers, graffiti on private property, graffiti on public property, landscaping, tree trimming, roadway defects and sidewalk defects.

- Over the 2007-2011 period, total service calls to CBD/BID areas increased from 9,388 to 13,598—an increase of 4,210 calls, or 45%. During the same period, citywide growth in service call requests increased by 24%. Accordingly, service calls to CBD/BID regions increased more than 20% above the City average.
- Absolute growth in service calls has been driven by new steam cleaning requests, street and sidewalk cleaning, and illegal dumping.
- Approximately 18% of all service calls made in 2011 were for properties within CBD/BID regions.

The 2012 CBD/BID Executive Director Survey included several questions on CBD/BID public realm cleanliness and maintenance. Collective CBD/BID public realm cleanliness and maintenance efforts over the life of the program have yielded:

- Removal of 82,716 garbage bags.
- Removal of 41,544 graffiti tags.
- Removal of 9,343 needles, specifically within the North Market/Tenderloin District.
- Response to 89,219 calls to CBD/BID organizations for service (includes public realm cleanliness and safety requests).

In Fiscal Year 2011-2012, collective CBD/BID public realm cleanliness and maintenance will provide: 1,112 hot spot cleanings; 421 power wash cleanings, and 6,445 sidewalk sweepings.

In Fiscal Year 2011-2012, collective CBD/BID public realm cleanliness and maintenance will provide: 1,112 hot spot cleanings; 421 power wash cleanings, and 6,445 sidewalk sweepings.



## Improvement of public safety

Public safety is a key focus area for San Francisco's CBDs/BIDs. In FY 2010-2011, districts invested \$1.85M in community safety programs, accounting for 20% of all CBD/BID expenditures over the period. Public safety is important to the bottom line of district merchants and paramount for the quality of life of residents, employees, and visitors. Crime impacts perceptions of safety, discouraging customers to visit and spend money at neighborhood businesses. Further, high crime rates can increase vacancy rates, by reducing the desirability of a neighborhood for business activity, and erode property values over the long term.

**San Francisco Police Department Detailed Crime Reports** from 2006-present were generated for 2500 Mission, Castro, Central Market, Fillmore, Fisherman's Wharf, Union Square, Greater Union Square, Noe Valley, North Market/Tenderloin, and Yerba Buena districts. Crime data were aggregated by district to investigate six Type I Crimes for which comparable citywide data exist: rape, robbery, aggravated assault, burglary, larceny, and auto-theft. Additionally, data on non-criminal offenses, vandalism, and drug offenses committed within CBD/BID-maintained areas were also extracted for analysis.

- San Francisco City has seen significant, consistent declines in criminal activity, averaging 19%, for 5 of six Type I crimes studied over the 2006-2011 period.
- After implementing services, crime levels decreased in CBD/BID regions 68% of the time; 52 of 77 observed crime trends improved.
- In 2006 there were 9,906 documented Type 1 crimes—rape, robbery, aggravated assault, burglary, larceny, and auto-theft—in CBD/BID regions; by 2011 this number fell to 9,663. This yielded a reduction of 243 crimes, or approximately a 2.45% decline.
- For the 7 districts for which data on rape was available, 6 posted more significant declines than the citywide trend, over the 2006-2011 period.
- Burglary in 8 of 9 studied district declined by 30% on average, and 4 districts, including the 2500 Block of Mission, Fisherman's Wharf, North Market/Tenderloin and Yerba Buena saw greater percent reductions compared to the citywide trend, over the 2006-2011 period.
- Auto Theft in 8 of 9 studied district declined by 32% on average, and 4 districts, including 2500 Block of Mission, Fisherman's Wharf, Central Market, and Yerba Buena saw greater percent reductions compared to the citywide trend, over the 2006-2011 period.

The 2012 CBD/BID Executive Director Survey included several questions on CBD/BID public safety services and investments. Collective CBD/BID public safety efforts over the life of the program have yielded:

- 1,484 coordination efforts with the San Francisco Police Department.

After implementing services, crime levels decreased in CBD/BID regions 68% of the time; 52 of 77 observed crime trends improved.

Crime data tables are presented on page 41.



- The development of 30 community safety programs, including safe passage programs, community safety gatherings, community safety watches, safety education, seminars and pamphlets, and ambassadors/ community guides.
- Response to 89,219 calls for service to CBD/BID organizations (includes both public realm cleanliness and safety requests).
- Installation of 7 security cameras.

Additionally, in the latest fiscal year, the program has employed 29 Community Ambassadors and 6 SFPD 10B Officers.

### Creation of economically viable neighborhood business districts

A key motivation for district formation is to reap commercial outcomes that directly benefit district members. For many property and business owners, annual assessments are perceived as a good business investment that may increase commercial activity, stabilize property values, and attract new development, business activity, and residents to the neighborhood. Understanding if CBDs/BIDs can influence these key commercial indicators is thus of great interest to district members and local policymakers.

**Commercial Office Property Values** from 2006-present were collected and adjusted to the 2006 base year to control for inflation. Data were available for the Union Square/Greater Union Square, Fillmore, North Market/Tenderloin, Central Market and Yerba Buena districts.

- Citywide commercial office property values decreased by 19.45% during the 07/09 recession and their improvement has been hampered by a slow economic recovery.
- 4 of 5 studied districts, including Union Square/Greater Union Square, Fillmore, North Market/Tenderloin, and Yerba Buena retained more of their value during the Recession, as compared to the citywide trend. Districts lost 8.9% of their value, while citywide declines reached 19.45%.
- Commercial office property values are recovering from their recession lows, and values across the City have grown by 21% from 2011 to 2012. During this period, the Yerba Buena and Central Market districts have grown at a faster pace, by 22.95% and 31.74% respectively. The Greater Union Square district is also trending positive and gaining value, but at a slower rate.
- Yerba Buena and Central market have grown by 50.02% and 23.93% in real value (adjusted for inflation) from 2006-2012, while citywide commercial office property values have grown only 15.79%.

**Commercial Non-Office Property Values** from 2006-present were collected and adjusted to the 2006 base year to control for inflation.



North Market/Tenderloin CBD.



- During the 07/09 recession, the City lost 26.69% in non-office commercial property values. All districts for which viable data existed, including Union Square/Greater Union Square, Central Market, North Market/Tenderloin, and Yerba Buena, performed significantly better during the same period, by retaining more value, or posting positive gains in non-office commercial property values. Specifically, excluding the North Market/Tenderloin outlier, on average, districts saw 2.5% growth in real non-office commercial property values during the recession.

**Commercial Vacancy Rates** from 2006-present were collected for 9 districts.

- 8 of the 9 studied districts had lower vacancy rates in FY10-11 than compared to their vacancy rate at the time of service implementation. Over this period, vacancy rates declined by 3.1% on average.
- During the 07/09 recession, commercial vacancy rates worsened across the City by 2.1%. During this period, 6 of 9 studied districts had vacancy rates that declined—meaning they had a higher concentration of occupied property than before the recession.

**Sales tax revenue growth rates** were assembled from MuniServices historic sales tax reports (1999-present) for the Union Square/Greater Union Square, Castro/Upper Market, Noe Valley, North of Market/Tenderloin, 2500 Block of Mission Street, Fisherman's Wharf, Fillmore, Central Market, and Yerba Buena districts. Growth in sales tax revenue translates into higher sales revenues for the businesses subject to the payment of sales tax. Accordingly, the measure is a useful representation of commercial activity, which is difficult to assess directly as financial information is proprietary and rarely disclosed publicly. However, sales taxes are not assessed on all commercial activity, therefore this measure may miss commercial growth in services, for example, which are less frequently taxed than tangible goods.

- Sales taxes have declined sharply in San Francisco from their peak of \$114M in FY99-00 to \$92.9M in FY10-11, a drop of 18.5%. Two driving factors behind this decline are that current sales and use tax policy in California excludes many forms of services and goods, and sales of personal goods and apparel are increasingly conducted online where they are less likely to be taxed.
- \$21.6M or 23% of San Francisco's total sales tax revenue was generated within CBD/BID boundaries for FY10-11. This measure does not include the Ocean Avenue or Civic Center districts, which were formed in 2010.
- During the 07/09 recession, citywide sales tax revenues declined by 20%. All 9 studied districts fared better than the City during the recession, on average retaining 4.8% more value. The North Market/Tenderloin and Greater Union Square districts grew sales tax revenues in real value by 7% and 5%, respectively, during the recession.

During the 07/09 recession, citywide sales tax revenues declined by 20%. All 9 studied districts fared better than the City during the recession.

Sales tax revenue data was adjusted for inflation, and all figures are measured in 2000 dollars.



- Four districts, including Noe Valley, North Market/Tenderloin, 2500 Block Mission, and Greater Union Square have seen an average gain of 7.75% in real sales tax revenues since implementing their services. 3 of the 9 districts saw small declines (3-5%) in sales tax revenues since implementing services, including Fillmore, Central Market and Yerba Buena. Despite these declines, the Fillmore and Central Market districts still outperformed the City over the same time period.
- 2 of the 9 districts saw larger declines in sales tax revenues since implementing services, including Castro/Upper Market (-11%), and Fisherman's Wharf (-16%). In absolute terms, Castro/Upper Market saw a decline of \$119,994 in sales tax revenues, while Fisherman's Wharf saw a decline of \$115,157. These data are buffered by the overall citywide trend, which experienced a -7% decline during the comparison period for Castro/Upper Market, and a -10% decline during the comparison period for Fisherman's Wharf.
- At the point of implementing services through the FY10-11 period, 6 of 9 Districts outperformed the City's growth pattern over the same period by an average of 8%.

### Financial sustainability with capacity to leverage additional investments

It is essential for CBDs/BIDs to remain financially sustainable throughout their period of operation. To do so, CBDs/BIDs rely on assessment income from district property and or business owners, as well as non-assessment income from donations, grants, and in-kind support. Strong financial controls and oversight built into San Francisco's CBD/BID program require annual financial reporting. This policy increases accountability and transparency.

Over the life of the program, CBDs/BIDs have collectively invested \$57.3M in community economic development services and activities.

CPA certified financial statements for the full population of CBDs/BIDs were reviewed for all years of operation to uncover a comprehensive understanding of their financial activities.

- From fiscal year 1999-2012, San Francisco's CBDs, BIDs and Tourism Improvement District (TID) have invested \$125.96M in economic development activities, through special assessments and by leveraging other income sources, including, but not limited to donations, grants, and in-kind support. \$68.7M was invested by the TID, whereas CBDs/BIDs have invested \$57.3M.
- Of the \$57.3M that has been invested by districts to revitalize their neighborhoods between FY99-FY12, \$7.4M or 12.9% of all income, was generated from non-assessment sources. Statutes governing special assessment districts require that 5% or 1% income be generated from non-assessment sources—depending on the date of formation. CBD/BID performance is much greater than these thresholds.



- Nearly \$1M will be raised by districts from non-assessment sources for the 2011-2012 fiscal year.
- The CBD/BID dollar is spent across five key areas:
  - Public realm cleanliness (43¢)
  - Safety (20¢)
  - District identity, marketing and events (9¢)
  - Streetscapes, greening and beautification (9¢)
  - Administration (18¢), including salary and benefits of administrative employees, office rent, supplies, equipment, depreciation, insurance, community outreach, district advocacy, professional services and miscellaneous expenses.

## Investment and improvement in the physical environment

CBDs/BIDs are uniquely equipped to organize district members, raise the necessary funding, and navigate a complex process to beautify public areas through art and street furniture installations. With their dedicated administrative and financial resources, CBDs/BIDs beautify their districts and outfit their streets with physical assets that increase the desirability of a neighborhood commercial district for new businesses and customers.

CBDs/BIDs have directly created or improved 25 new public open spaces including plazas and parklets

The 2012 CBD/BID Executive Director Survey included several questions on CBD/BID physical environment investments. Collective CBD/BID streetscape improvements, beautification and greening work commissioned by San Francisco's CBDs/BIDs from 1999 to present have yielded:

- 6 neighborhood public realm or project-specific streetscape improvement plans
- 36 unique public art installations
- 48 street furniture installations
- 26 lighting fixtures installed on streets and building facades
- 337 new street trees planted
- Creation and or improvement of 25 new public open spaces including plazas and parklets
- Installation of 22 new public seating areas
- \$5.2M physical environment investments, including greening, beautification, planters, and flower baskets

## Increased number and quality of events, marketing and branding

Events create excitement and intrigue to visit neighborhood commercial districts and shop, partake in an activity, dine out or enjoy live entertainment. CBDs/BIDs organize events to draw new customers and pedestrians to the district, while giving frequent visitors a reason to return. CBDs/BIDs also brand and market their neighborhoods by drawing on the community's strengths in signage, advertising and messaging. Events and neighborhood branding position districts as vibrant places to visit.



Mural and street furniture installation in the North Market/Tenderloin CBD.



The 2012 CBD/BID Executive Director Survey included several questions on CBD/BID event, marketing and branding work. Collective CBD/BID efforts from 1999 to present, excluding the TID or original Union Square BID, have provided:

- Production of over 405 events, including farmers markets, community festivals and holiday shopping campaigns
- 1.1M participants in CBD/BID-sponsored and produced events
- 1.9M website hits on district websites
- \$2.97M invested in community marketing, with 22% dedicated to print; 35% dedicated to web; 10% dedicated to banners; 5% dedicated to newspaper; and 29% dedicated to other sources
- \$1.27M invested for community events

### Increased community participation, leadership and coordination

One of the greatest advantages CBDs/BIDs have over regions without a CBD/BID is the capacity of the nonprofit organization to engage property owners, businesses and residents to improve the vitality of the neighborhood commercial district. Greater community involvement among district participants can strengthen relationships which help to improve management, oversight, and the refinement of service delivery.

The 2012 CBD/BID Executive Director Survey included several questions on CBD/BID community participation, leadership and coordination efforts. Collective CBD/BID efforts in these areas include:

- Participation of 145 CBD/BID Board Members who contribute, on average, 4.75 hours each month to district operations
- 48 unique leadership committees that have over 456 total participants, including Board Members, district members and community advocates
- Participation of 276 volunteers engaged in other events and activities, outside of leadership committees



Community planning meeting in the Noe Valley CBD.

### Limitations to the Analysis

Several broad factors reflecting the integrity, completeness of the data, and the analytical techniques used in this analysis must be considered when interpreting the findings of this report.

**Interpreting Causation:** It is tempting to assume that the full weight of a positive outcome is the result of district provided services or activities, but these assumptions should be made with great care. This analysis does not proscribe definitive causation in any weight or direction, and largely relies on correlational inference. Causal relationships between variables are likely to exist, and can be measured directly, but the statistical techniques necessary to evaluate those relationships are not considered in this report.



**Applying Results to Other CBDs/BIDs:** The results of this analysis apply specifically to the districts under analysis and should be applied with caution to other San Francisco CBDs/BIDs, and with great discretion to districts beyond the Bay Area. The unique dynamics of San Francisco weigh heavily on the results of this analysis and distort the application of these results to CBDs/BIDs in other regions with different characteristics.

**Limited Control Groups:** This analysis relies on comparing outcomes within CBD/BID regions against one another, and against general trends in San Francisco. Developing a quasi-control, such as a district that came very close to formation, but did not successfully form, would yield another comparison group that may eliminate some of the confounding factors that compel BID success, but which are unrelated to assessment-based investments. This analysis should serve as a stepping stone to deeper analyses and studies utilizing more advanced and targeted techniques to directly assess causality and understand relationships among variables.



# District Profiles

## Overview

There is great diversity among San Francisco's CBDs/BIDs. Not only do CBD/BID organizations offer a unique service menu in each district, but the neighborhoods in which they operate differ from one another in significant ways. The following profiles offer a more comprehensive representation of each neighborhood commercial district by surveying services, budgets, geography, demographics and micro-level economies.

Along the dimensions of size, budget, demography and economy, differences among districts underscore that each has its own unique set of qualities that are likely to influence the outcomes studied in this report. These data provide important background information that help to explain why one district may be more successful in achieving a particular outcome over another district that has different characteristics. For example, population density may impact levels of sidewalk cleanliness, making it difficult for a dense district to improve its street sanitation scores over time. The referential information contained in the profiles should serve as useful tool when interpreting the results for a single district, or in comparing differential results across districts.

## Methodology

Profiles for all active, operating districts were prepared by utilizing data from the following sources:

Population & Income: Census Bureau, Census 2010, American Community Survey, 5 Year 2006-2010.

Establishments: Dun & Bradstreet (2012).

Employment: California Employment Development Department (2012).



# Greater Union Square

Union Square Business Improvement District, Inc.

## Overview

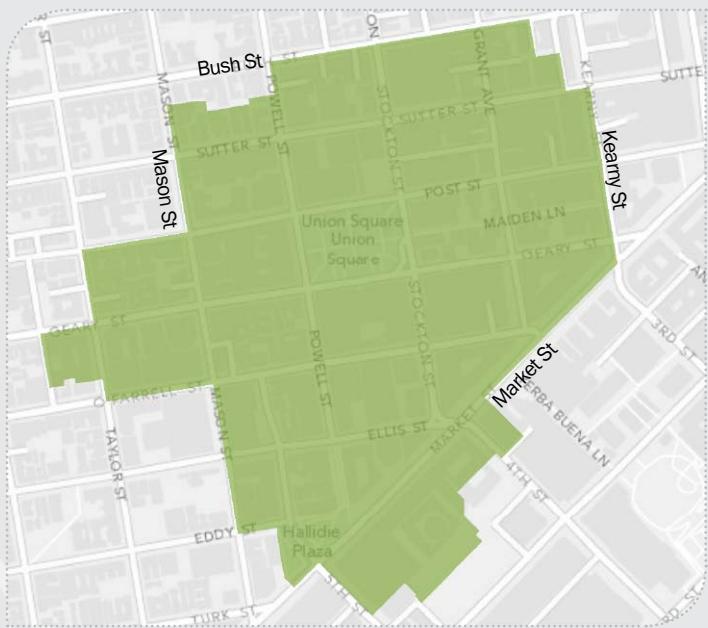
Year Established: 1999 – Original  
2004 – Original renewed  
2009 – Expanded renewed

Services Started: 2000

Term: 10 years

Total Assessed Properties: 590

Total Square Blocks : 27, Original BID – 10 blocks



## Demographics

Geographic Size: 91 acres

Population: 7,665

Population Density: 47 persons/acre

Total Households: 4,916

## Economic Indicators

Median Household Income: \$41,414

Jobs: 25,708

Job Density: 283 jobs/acre

## Annual Assessment Budget

\$3,041,000

## Services Provided

Public Realm Cleanliness, Public Safety, Beautification, Streetscape Improvements, Marketing, Community Building, Advocacy

## Job & Establishment Distribution

	Cultural, Institutional, Educational	Medical	Managerial, Information, Professional, Multi-media	Production, Distribution, Repair	Retail, Entertainment	Lodging	Total	Commercial Density by Acre
Jobs Distribution	1,368 5%	2,000 8%	7,749 30%	184 1%	9,590 37%	4,817 19%	25,708	283
Establishments Distribution	197 7%	451 15%	1,387 46%	38 1%	877 29%	64 2%	3,014	33



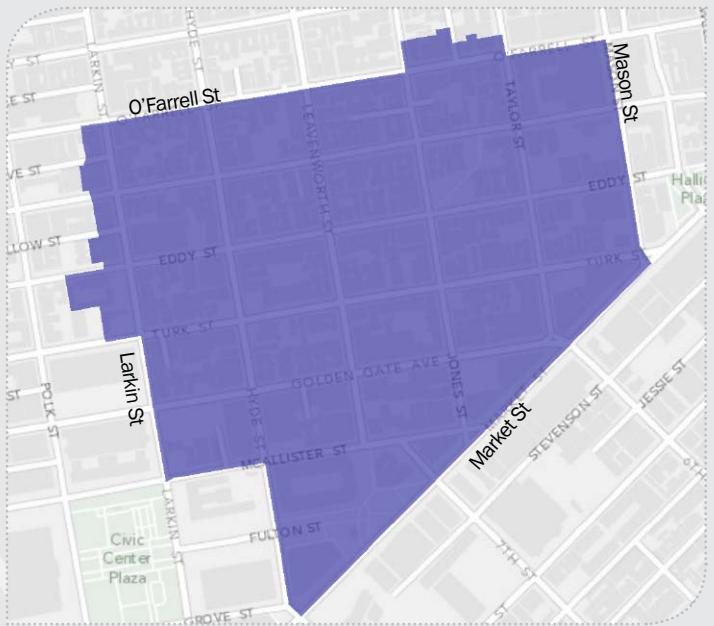
# North Market/Tenderloin

North of Market/Tenderloin Community Benefit Corporation

## Overview

Year Established: 2005  
Services Started: 2006  
Term: 15 years

Total Assessed Properties: 605  
Total Square Blocks: 10



## Demographics

Geographic Size: 104 acres  
Population: 27,699  
Population Density: 181 persons/acre  
Total Households: 14,677

## Economic Indicators

Median Household Income: \$21,183  
Jobs: 6,067  
Job Density: 58 jobs/acre

## Annual Assessment Budget

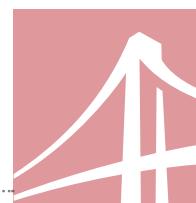
\$675,000

## Services Provided

Public Realm Cleanliness, Beautification, Streetscape Improvements, Job Training & Transitional Employment, Advocacy, Public Safety

## Job & Establishment Distribution

	Cultural, Institutional, Educational	Medical	Managerial, Information, Professional, Multi-media	Production, Distribution, Repair	Retail, Entertainment	Lodging	Total	Commercial Density by Acre
Jobs Distribution	1,919 32%	101 2%	2,315 38%	145 2%	753 12%	834 14%	6,067	58
Establishments Distribution	101 13%	24 3%	318 42%	41 5%	217 29%	50 7%	751	7



# Fisherman's Wharf Landside & Portside

Fisherman's Wharf Association of San Francisco

## Overview

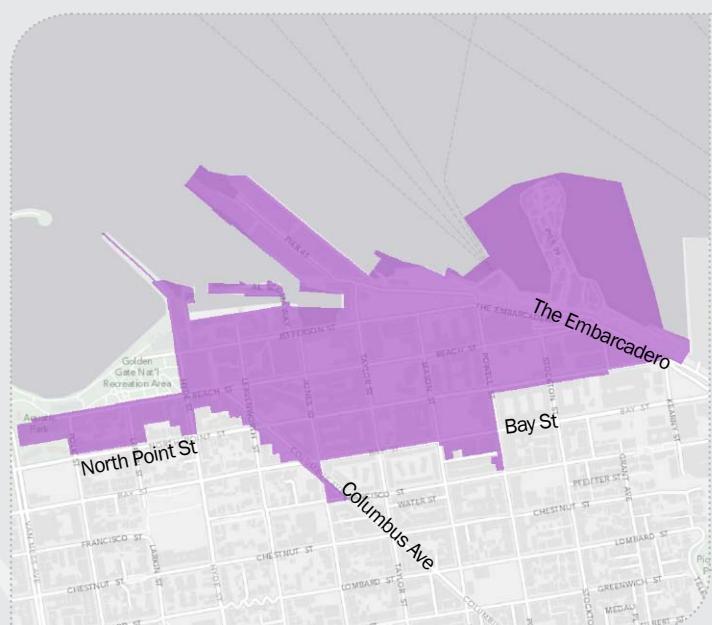
Year Established:	2005 – Landside 2006 – Portside
Services Started:	2006 – Landside 2007 – Portside
Term:	15 years – Landside 14 years – Portside
Total Assessed Properties:	105 – Landside
Total Assessed Businesses:	56 – Portside
Total Square Blocks:	30

## Demographics

Geographic Size:	143 acres
Population:	5,885
Population Density:	21 persons/acre
Total Households:	3,242

## Economic Indicators

Median Household Income:	\$77,470
Jobs:	8,384
Job Density:	59 jobs/acre



## Annual Assessment Budget

\$775,053

## Services Provided

Public Realm Cleanliness, Public Safety, Streetscape Improvements, Marketing, Business Attraction

## Job & Establishment Distribution

	Cultural, Institutional, Educational	Medical	Managerial, Information, Professional, Multi-media	Production, Distribution, Repair	Retail, Entertainment	Lodging	Total	Commercial Density by Acre
Jobs Distribution	486 6%	20 0%	1,780 21%	25 0%	3,749 45%	2,324 28%	8,384	59
Establishments Distribution	56 9%	9 1%	249 38%	11 2%	300 46%	27 4%	652	5



# Noe Valley

North of Market/Tenderloin Community Benefit Corporation

## Overview

Year Established: 2005  
Services Started: 2006  
Term: 15 years

Total Assessed Properties: 176  
Total Square Blocks: 8



## Demographics

Geographic Size: 20 acres  
Population: 6,469  
Population Density: 37 persons/acre  
Total Households: 3,103

## Economic Indicators

Median Household Income: \$113,077  
Jobs: 1,355  
Job Density: 66 jobs/acre

## Annual Assessment Budget

\$225,302

## Services Provided

Public Realm Cleanliness, Beautification, Streetscape Improvements

## Job & Establishment Distribution

	Cultural, Institutional, Educational	Medical	Managerial, Information, Professional, Multi-media	Production, Distribution, Repair	Retail, Entertainment	Lodging	Total	Commercial Density by Acre
Jobs Distribution	59 4%	112 8%	379 28%	182 13%	623 46%	0 0%	1,355	66
Establishments Distribution	30 9%	46 14%	83 25%	44 13%	124 38%	0 0%	327	16



# Castro/Upper Market

Castro/Upper Market Community Benefit District, Inc.

## Overview

Year Established: 2005  
Services Started: 2006  
Term: 15 years

Total Assessed Properties: 270  
Total Square Blocks: 10



## Demographics

Geographic Size: 60 acres  
Population: 15,089  
Population Density: 47 persons/acre  
Total Households: 8,273

## Economic Indicators

Median Household Income: \$81,962  
Jobs: 3,759  
Job Density: 63 jobs/acre

## Annual Assessment Budget

\$397,068

## Services Provided

Public Realm Cleanliness, Beautification, Streetscape Improvements, Business Attraction

## Job & Establishment Distribution

	Cultural, Institutional, Educational	Medical	Managerial, Information, Professional, Multi-media	Production, Distribution, Repair	Retail, Entertainment	Lodging	Total	Commercial Density by Acre
Jobs Distribution	354 9%	224 6%	777 21%	225 6%	2,141 57%	38 1%	3,759	63
Establishments Distribution	67 9%	58 8%	225 30%	102 14%	289 39%	7 1%	748	13



# 2500 Block of Mission

Mission Miracle Mile, Inc.

## Overview

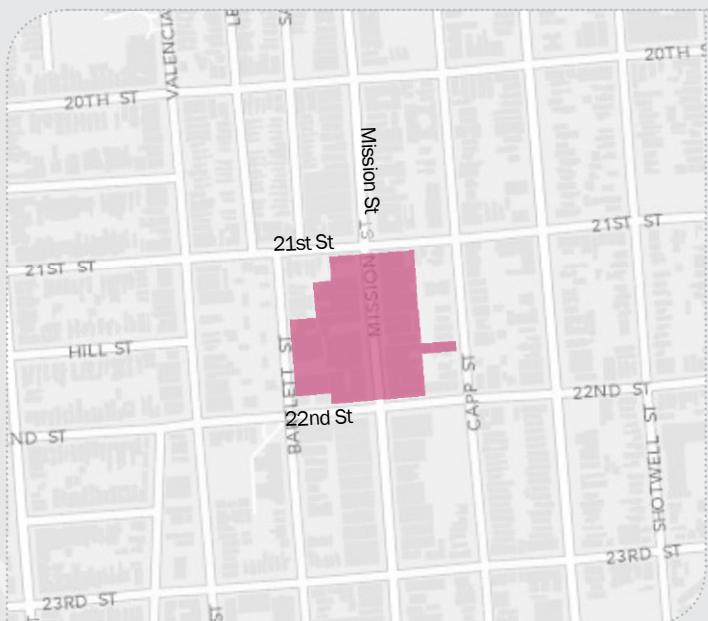
Year Established: 2005

Services Started: 2006

Term: 5 years

Total Assessed Properties: 20

Total Square Blocks: 1



## Demographics

Geographic Size: 5 acres

Population: 3,772

Population Density: 65 persons/acre

Total Households: 3,641

## Economic Indicators

Median Household Income: \$55,887

Jobs: 317

Job Density: 65 jobs/acre

## Annual Assessment Budget

\$75,000

## Services Provided

Public Realm Cleanliness, Beautification, Public Safety

## Job & Establishment Distribution

	Cultural, Institutional, Educational	Medical	Managerial, Information, Professional, Multi-media	Production, Distribution, Repair	Retail, Entertainment	Lodging	Total	Commercial Density by Acre
Jobs Distribution	8 3%	39 12%	59 19%	29 9%	174 55%	8 3%	317	65
Establishments Distribution	2 2%	15 19%	23 28%	14 17%	26 32%	1 1%	81	17



# Central Market

Central Market Community Benefit Corporation

## Overview

Year Established: 2006

Services Started: 2007

Term: 7 years

Total Assessed Properties: 141

Total Square Blocks: 5

## Demographics

Geographic Size: 65 acres

Population: 5,811

Population Density: 66 persons/acre

Total Households: 3,501

## Economic Indicators

Median Household Income: \$12,634

Jobs: 6,437

Job Density: 185 jobs/acre

## Annual Assessment Budget

\$535,299

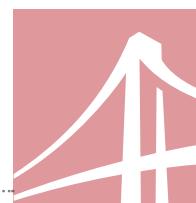


## Services Provided

Public Realm Cleanliness, Public safety, Marketing, Streetscape Improvements, Beautification, Business Attraction

## Job & Establishment Distribution

	Cultural, Institutional, Educational	Medical	Managerial, Information, Professional, Multi-media	Production, Distribution, Repair	Retail, Entertainment	Lodging	Total	Commercial Density by Acre
Jobs Distribution	457 7%	686 11%	4,167 65%	36 1%	588 9%	503 8%	6,437	185
Establishments Distribution	51 13%	16 4%	219 55%	4 1%	97 24%	11 3%	398	11



# Yerba Buena

Yerba Buena Community Benefit District

## Overview

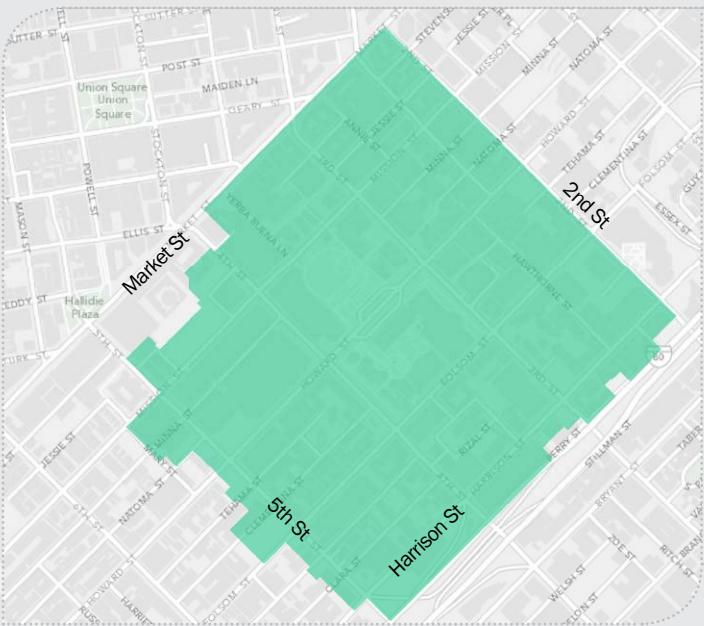
Year Established: 2008

Services Started: 2009

Term: 7 years

Total Assessed Properties: 1554

Total Square Blocks: 12+



## Demographics

Geographic Size: 172 acres

Population: 8,312

Population Density: 28 persons/acre

Total Households: 5,112

## Economic Indicators

Median Household Income: \$66,367

Jobs: 29,107

Job Density: 169 jobs/acre

## Annual Assessment Budget

\$2,384,045

## Services Provided

Public Realm Cleanliness, Public Safety, Streetscape Improvements, Marketing

## Job & Establishment Distribution

	Cultural, Institutional, Educational	Medical	Managerial, Information, Professional, Multi-media	Production, Distribution, Repair	Retail, Entertainment	Lodging	Total	Commercial Density by Acre
Jobs Distribution	2,910 10%	2,864 10%	16,861 58%	1,616 6%	3,475 12%	1,381 5%	29,107	169
Establishments Distribution	204 11%	67 4%	1,245 65%	72 4%	297 16%	25 1%	1,910	11



# Ocean Avenue

Ocean Avenue Association

## Overview

Year Established: 2010  
 Services Started: 2011  
 Term: 15 years

Total Assessed Properties: 148  
 Total Square Blocks: 13



## Demographics

Geographic Size: 124 acres  
 Population: 7,606  
 Population Density: 19 persons/acre  
 Total Households: 2,428

## Economic Indicators

Median Household Income: \$97,617  
 Jobs: 1,041  
 Job Density: 8 jobs/acre

## Annual Assessment Budget

\$239,578

## Services Provided

Public Realm Cleanliness, Public Safety, Marketing, Streetscape Improvements, Beautification

## Job & Establishment Distribution

	Cultural, Institutional, Educational	Medical	Managerial, Information, Professional, Multi-media	Production, Distribution, Repair	Retail, Entertainment	Lodging	Total	Commercial Density by Acre
Jobs Distribution	250 24%	75 7%	181 17%	109 10%	426 41%	0 0%	1,041	8
Establishments Distribution	28 13%	12 6%	49 23%	38 18%	86 40%	0 0%	213	2



# Civic Center

Civic Center Community Benefit District, Inc.

## Overview

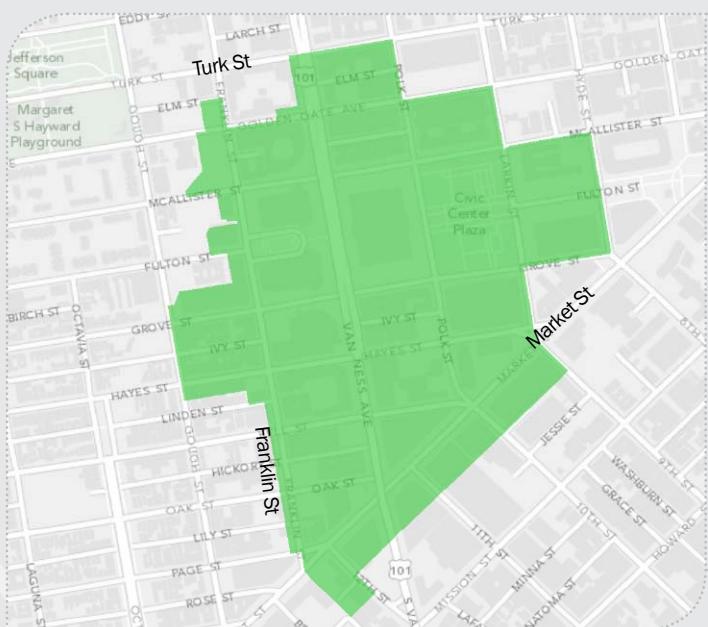
Year Established: 2010

Services Started: 2012

Term: 10 years

Total Assessed Properties: 203

Total Square Blocks: 35



## Demographics

Geographic Size: 100 acres

Population: 6,989

Population Density: 34 persons/acre

Total Households: 4,353

## Economic Indicators

Median Household Income: \$53,689

Jobs: 15,526

Job Density: 156 jobs/acre

## Annual Assessment Budget

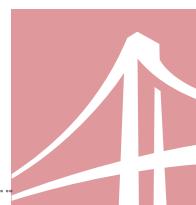
\$685,044

## Services Provided

Public Realm Cleanliness, Public Safety, Beautification

## Job & Establishment Distribution

	Cultural, Institutional, Educational	Medical	Managerial, Information, Professional, Multi-media	Production, Distribution, Repair	Retail, Entertainment	Lodging	Total	Commercial Density by Acre
Jobs Distribution	1,762 11%	163 1%	11,796 76%	172 1%	1,620 10%	13 0%	15,526	156
Establishments Distribution	116 14%	46 6%	494 61%	41 5%	107 13%	4 0%	808	8



# Selected Data & Charts

## Selected Cleanliness Perception Measurements from 2010 San Francisco Street and Sidewalk Perception Study (Fairbank, Maslin, Maullin, Metz & Associates)

	General Cleanliness Rating	Condition of Sidewalk: cracks, discoloration and evenness	Cleanliness of the Street: curb to middle of road	Block Appearance	Sidewalk Litter	Graffiti	Trash Receptacles: cleanliness, fullness, paint, cracks or damage
Noe Valley	6.07	5.87	5.73	6.13	6.13	6.13	5.53
District 8 Commercial Index	5.65	5.54	5.48	5.85	5.59	5.76	5.33
Castro	5.25	5.31	5.31	5.63	5.25	5.56	5.00
District 8 Commercial Index	5.65	5.54	5.48	5.85	5.59	5.76	5.33
Greater Union Square	5.67	5.80	5.67	6.00	6.13	6.07	5.80
District 6 Commercial Index	5.57	5.55	5.46	5.70	5.63	5.58	5.43
Central Market	4.20	4.00	3.80	3.73	3.40	2.73	4.07
District 6 Commercial Index	5.57	5.55	5.46	5.70	5.63	5.58	5.43
Yerba Buena	5.20	5.13	5.00	5.20	5.33	5.80	4.87
District 6 Commercial Index	5.57	5.55	5.46	5.70	5.63	5.58	5.43
SF Commercial Index	4.84	4.93	5.07	5.10	4.90	5.12	4.91

Data are measured on a scale from 1 being the lowest, 4 being no opinion and 7 being the highest. All response data were collected from questions pointing to pedestrian satisfaction.

## DPW Service Calls Received in CBD/BID Regions by Call Type - 2007-2011

			% Change						# Change
			2007	2008	2009	2010	2011	2007 vs. 2011	
Street Cleaning		Street and Sidewalk Cleaning	3,755	4,998	4,466	4,353	4,656	24%	901
		Illegal Dumping	1,332	1,395	1,614	1,751	2,173	63%	841
		Steamers	2,568	2,597	3,464	4,229	4,507	76%	1,939
Graffiti		Graffiti - Private Property	541	1,204	839	600	654	21%	113
		Graffiti - Public Property	559	1,192	1,272	693	724	30%	165
Landscaping		Landscaping	72	118	139	96	73	1%	1
Bureau Urb Forestry		Tree Trimming	155	318	233	250	168	8%	13
Roadway Repair		Rodway Defects	406	392	508	364	405	0%	-1
District Inspection		Sidewalk Defects	0	0	32	249	238	23800%	238
Annual Totals			9,388	12,214	12,567	12,585	13,598	45%	4210

\* Includes (9) CBDs: 2500 Block of Mission, Castro, Central Market, Fillmore, Fisherman's Wharf, Greater Union Square, Noe Valley, North Market/Tenderloin, and Yerba Buena



DPW Service Call History by District - 2007-2011						
	2007	2008	2009	2010	2011	% Change 2007 vs. 2011
2500 Block of Mission	27	24	63	96	43	59%
Castro	1,397	1,844	2,107	1,911	1,632	17%
Central Market	1,711	2,419	2,436	2,146	2,306	35%
Fillmore	445	479	413	564	436	-2%
Fisherman's Wharf	208	325	326	242	208	-2%
Greater Union Square	472	671	657	528	812	0%
Noe Valley	309	237	130	131	520	72%
North Market/Tenderloin	3,390	4,188	4,643	5,281	5,847	68%
Yerba Buena	1,429	2,027	1,792	1,686	1,794	26%
CBD Totals	9,388	12,214	12,567	12,585	13,598	45%
City of San Francisco	77,445	88,290	93,699	96,163	96,065	24%

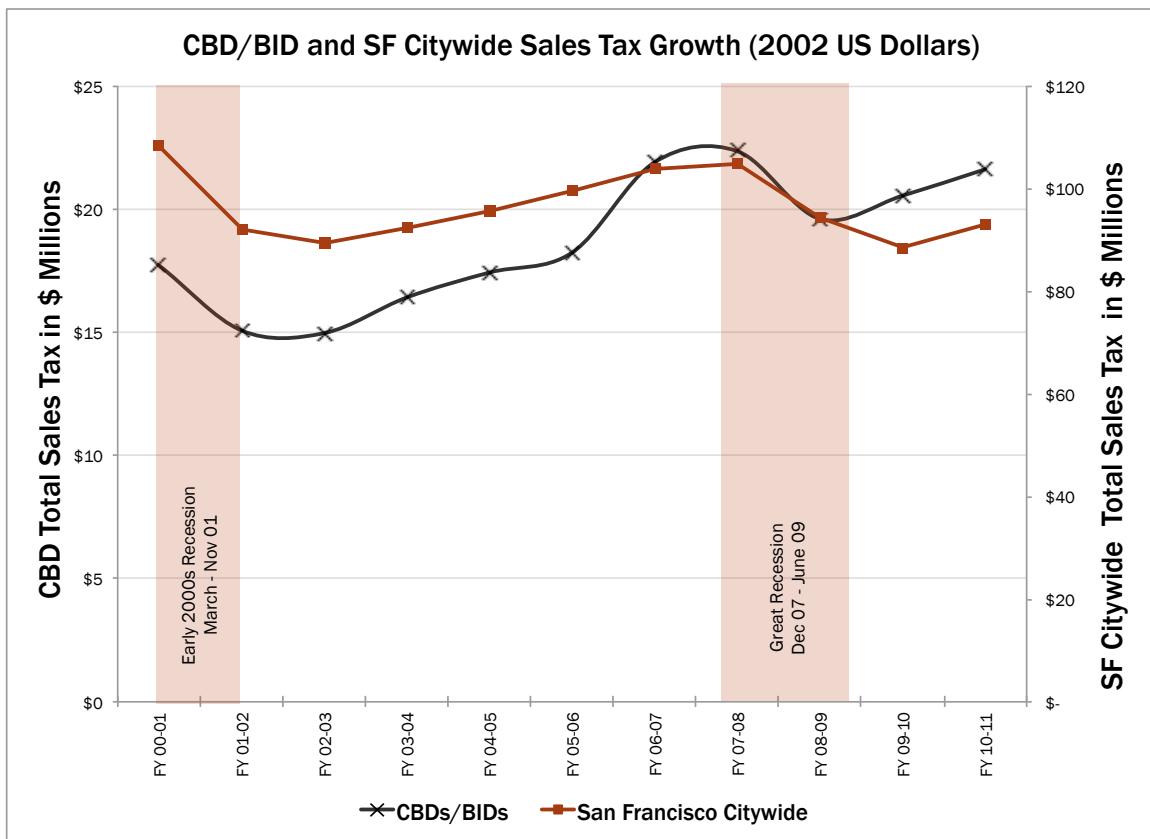
San Francisco Uniform Crime Reports (UCR) - Calendar Year Totals - 2006-2011						
	2006	2007	2008	2009	2010	% Change 2006 vs. 2011
Homicide	85	98	98	45	50	-41%
Rape	154	125	167	179	147	-15%
Robbery	3,858	3,771	4,108	3,420	3,180	-20%
Aggravated Assault	2,435	2,418	2,372	2,316	2,386	-14%
Total Violent	6,533	6,412	6,745	5,960	5,763	-18%
Burglary	6,465	5,079	5,401	5,192	4,557	-32%
Larceny	23,891	23,474	25,142	24,475	23,905	2%
Auto Theft	6,636	5,903	5,758	4,940	3,903	-37%
Total Non-Violent	36,992	34,456	36,301	34,607	32,521	-11%
Violent and Non-Violent Total	43,525	40,868	43,046	40,567	38,128	-12%

Summary Table of CBD/BID Crime Trends by Type - Year Services Started vs. 2011										
	Rape	Robbery	Aggravated Assault	Burglary	Larceny	Auto Theft	Non-Criminal Offenses	Vandalism	Drug Offenses	Total Crime Types with Declining Prevalency
2500 Block of Mission	-	50%	-33%	-75%	-19%	-100%	-67%	-20%	-100%	7
Castro	0%	-16%	26%	-10%	41%	-26%	9%	17%	-5%	4
Central Market	-100%	27%	15%	7%	-39%	-39%	16%	-33%	-3%	5
Fillmore	-	-4%	-14%	-4%	0%	-14%	-1%	-3%	-11%	8
Fisherman's Wharf	-100%	-26%	0%	-48%	-5%	-22%	-22%	-21%	-20%	8
Greater Union Square	-50%	23%	42%	-13%	17%	-30%	11%	17%	-56%	4
Noe Valley	-	-43%	100%	-14%	-5%	-18%	31%	-50%	-	5
North Market/Tenderloin	-60%	-19%	-19%	-34%	-23%	-42%	1%	-26%	-33%	8
Yerba Buena	-33%	9%	5%	-36%	10%	4%	37%	20%	-81%	3
City of San Francisco 2006-2011	-15%	-20%	-14%	-32%	2%	-37%	-	-	-	
Total Districts Exhibiting Less Crime	5	5	3	8	6	8	3	6	8	



### CBD/BID Sales Tax Analytics - Total Sales Tax - in 2000 US Dollars

	Total Sales Tax When Services Started	Total Sales Tax FY10-11	% Change Year of Service Start vs. FY 10-11	% Change SF City over CBD Service Period	Abs. Change in CBD(%) relative to SF City during Service Period	% Change During Recession	% Change FY09-10 vs FY10-11
Union Square	\$ 7,443,144	\$ 8,364,882	12%	-14%	27%	-16%	6%
Castro/Upper Market	\$ 1,078,102	\$ 958,108	-11%	-7%	-4%	-19%	0%
Noe Valley	\$ 56,771	\$ 59,567	5%	-7%	12%	-13%	-4%
North of Market/Tenderloin	\$ 5,249,610	\$ 5,891,163	12%	-7%	19%	7%	5%
2500 Block of Mission Street	\$ 77,263	\$ 82,635	7%	-7%	14%	-17%	-1%
Fisherman's Wharf	\$ 714,446	\$ 599,289	-16%	-10%	-6%	-18%	3%
Fillmore	\$ 193,270	\$ 187,537	-3%	-10%	7%	-17%	0%
Central Market	\$ 418,973	\$ 398,857	-5%	-10%	6%	-12%	1%
Greater Union Square	\$ 10,001,541	\$ 10,701,699	7%	5%	2%	5%	7%
Yerba Buena	\$ 2,810,851	\$ 2,733,503	-3%	-1%	-1%	-18%	2%
SF City (2000)	\$ 108,408,922	\$ 92,981,864	-	-	-	-20%	5%



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