



Ocean Avenue Community Benefit District



Legislative Overview

**Community Benefit Districts (CBDs) /
Business Improvement Districts (BIDs) are
governed by:**

- **State law**
 - “1994 Act”
- **Local law**
 - “Article 15”



Review Process

This resolution covers Annual Reports for FY 2011-2012, 2012-2013, and 2013-2014

- OEWD ensures that all CBDs/BIDs are meeting their management plans.
- OEWD staff conducts an annual review of Annual Reports and CPA Financial Reviews.
- OEWD provides the Board of Supervisors with a summary memo.



Parcel Map

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Map Detail Showing Block and Lot Numbers

BOUNDARY MAP CITY AND COUNTY OF SAN FRANCISCO OCEAN AVENUE COMMUNITY BENEFITS DISTRICT



Ocean Avenue CBD Formation

Ocean Avenue CBD	Type	Assessment Budget*	Year Established	Expires
	Property-Based	\$ 239,578	2010	June 30, 2025

**initial budget identified in management plan , subject to annual cost of living adjustments*



Ocean Avenue CBD Operations

- **Staff**

- Executive Director – Daniel Weaver

- **Service Areas**

- **Cleaning, Maintenance, and Safety**

- Includes sidewalk cleaning and pressure washing, graffiti removal, trash removal, reporting and monitoring of illegal dumping, removing weeds from tree wells and painting city poles.

- **Marketing, Streetscape Improvements, and Beautification**

- Includes promoting the district, sponsoring special events, and developing marketing activities.

- **Management and Operations**

- Includes oversight of service contract, implementation of major projects, staffing the Board of Directors and committees, and general day to day operations.



BENCHMARKS

OEWD reviewed the following budget-related benchmarks for the Ocean Avenue CBD:

Benchmark 1 – Whether the variance between the budget amounts for each service category was within 10 percentage points from the budget identified in the Management Plan.

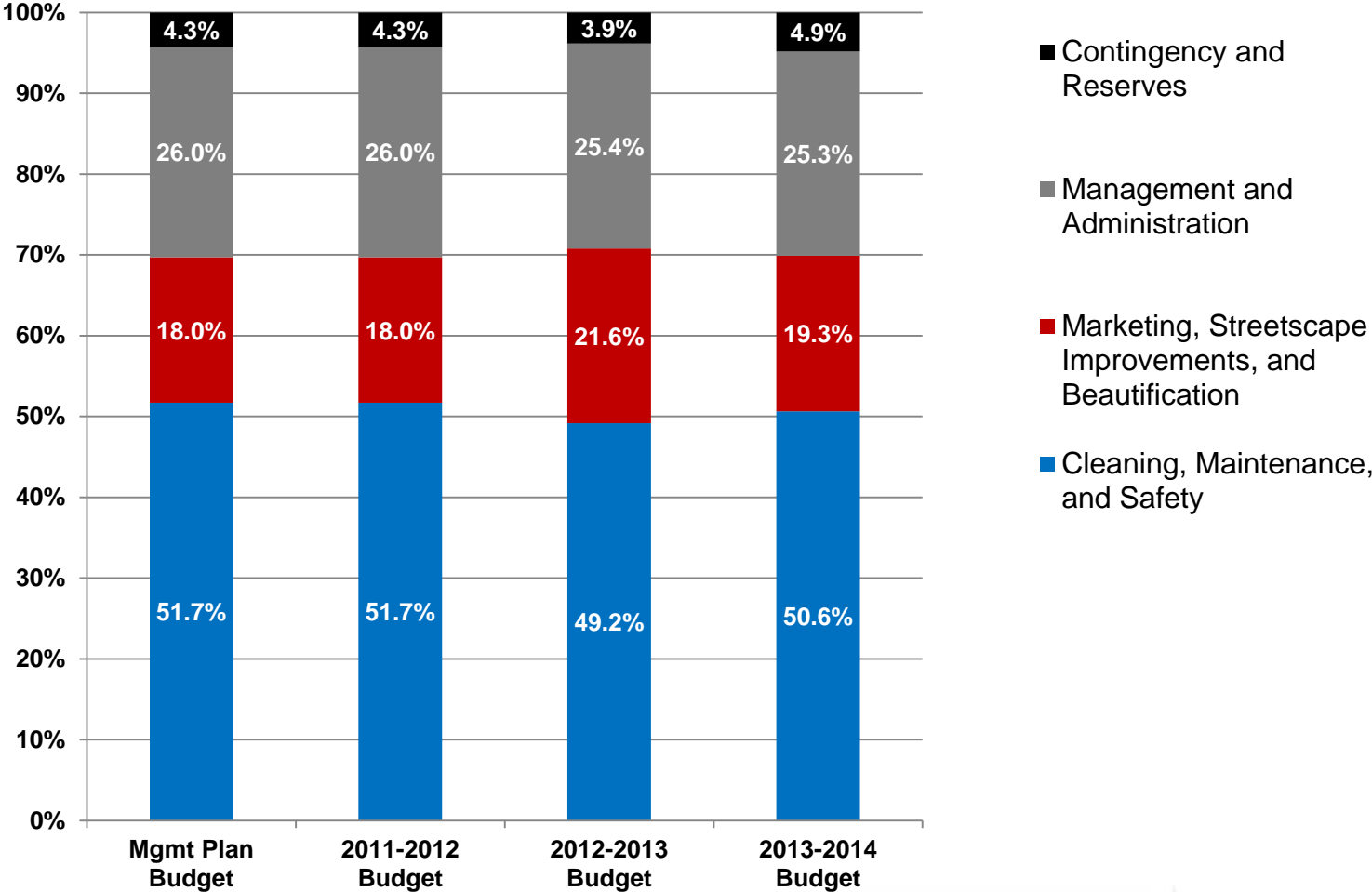
Benchmark 2 – Whether one percent (1%) of the Ocean Avenue CBD's actuals (i.e., income) came from sources other than assessment revenue.

Benchmark 3 – Whether the variance between the budget amounts for each service category was within 10 percentage points of the actuals.

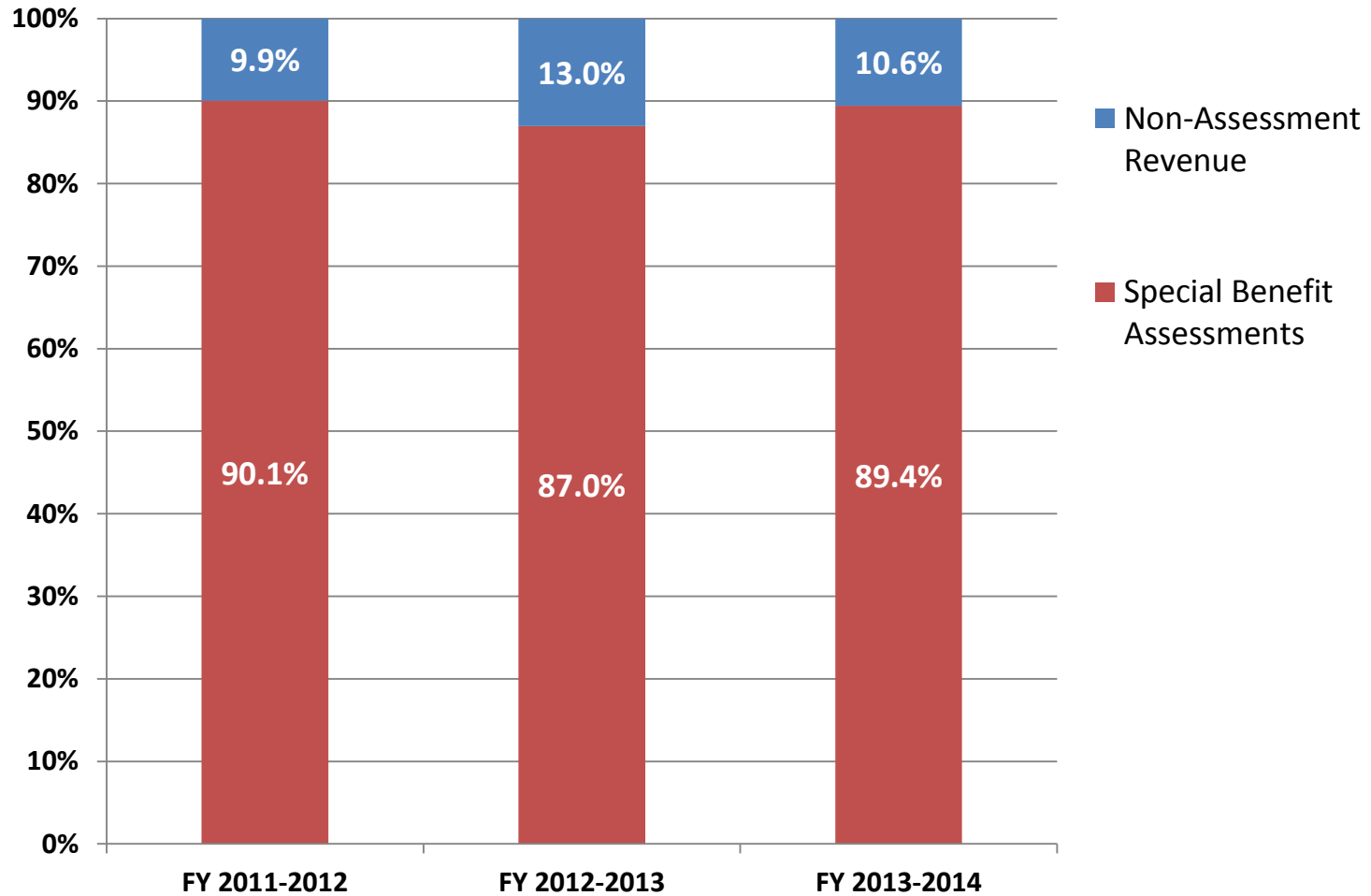
Benchmark 4 – Whether the Ocean Avenue CBD is indicating the amount of any surplus or deficit revenues to be carried forward into the next fiscal year and designating the projects to be funded by any surplus revenues.



1: Management Plan vs. Annual Budgets



2: Assessment Revenue & Other Income



3: Budget vs Actuals

Service Category	FY 2011-2012 Variance Percentage Points	FY 2012-2013 Variance Percentage Points	FY 2013-2014 Variance Percentage Points
Cleaning, Maintenance, and Safety	-4.5%	-2.7%	+3.7%
Marketing, Streetscape Improvements, and Beautification	-1.4%	-4.7%	-11.7%
Management and Operations	+10.2%	+11.1%	+12.8%



4: Carryover

Designated Projects	FY 2011-12 Carryover Disbursement	FY 2012-13 Carryover Disbursement	FY 2013-14 Carryover Disbursement	Allocation Percentage
Cleaning, Maintenance and Safety	\$70,561	\$114,149	\$107,800	52%
Marketing, Streetscape Improvements and Beautification	\$24,425	\$39,513	\$37,316	18%
Management and Operations	\$35,281	\$57,075	\$53,900	26%
Contingency and Reserves	\$5,428	\$8,781	\$8,292	4%
Total Designated Amount	\$135,695	\$219,518	\$207,308	100%



Recommendations for the Ocean Avenue CBD

In completing the review of the Ocean Avenue CBD's annual reports and financials, OEWD sets forth the following recommendations:

- The Ocean Avenue CBD should specify in their annual report how surplus carryover funds, if any, would be allocated the following year.
- Fund raising through promotions or other creative means would ensure the CBD continues to meet their non-assessment revenue goal independent of government grants.
- Educate property owners about the vision for the district.



Conclusion

The Ocean Avenue CBD has performed well in implementing the service plan in the district:

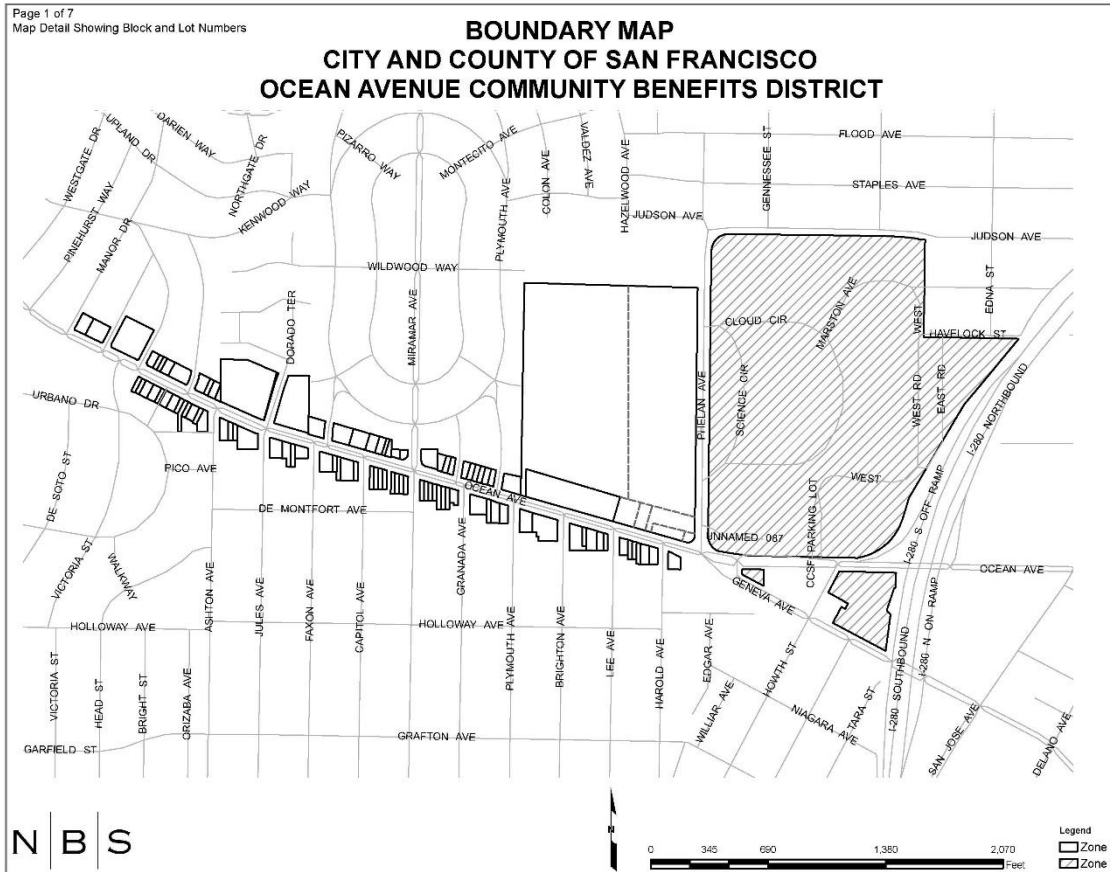
- Sponsored and helped implement events and programs on Ocean Avenue.
- Partnered with the community stakeholders and municipal agencies for small business technical assistance, attraction, and façade improvement along the commercial corridor.
- Maintained an active board of directors and several committees.



Ocean Avenue Association



Area Map of the CBD



Active Committees

- Street Life Committee: Focuses on the activation of the CBD retail district through public art, entertainment and design. Chaired by Alexander Mullaney.
- Business Committee: Concerned with business growth and retention. Chaired by Janene Summerland.

Partner Organizations

- San Francisco Beautiful
- Friends of the Urban Forest
- OMI Cultural Participation Project
- OMI Neighbors in Action
- Westwood Park Association
- Ingleside Terraces Homes Association

Partner Organizations (Government)

- Office of Economic and Workforce Development
- San Francisco Public Works
- Department of City Planning
- Bay Area Rapid Transit District

Grants (2011-2014)

- In 2011, the CBD was established. Each year (since 2011) we receive Community Development Block Grant funding for our \$30,000 small business assistance staff budget.
- In January of 2014, we received \$60,000 in Community Challenge Grant funding for the beautification and activation of the city-owned triangles of land at Ocean and Geneva avenues.
- In FY 2013-14, OAA received a \$100,000 SF Shines allocation for facade improvements to small businesses.

Events + Highlights- Cleaning, Maintenance and Safety

- Cleanscapes provides daily street maintenance service including sidewalk and gutter trash pickup, pressure-washing and graffiti removal where needed
- Arborist Now maintains trees on and near Ocean Avenue, including 65+ Washingtonia Palms
- OAA has set up a SAFE directory for corridor merchants

Events + Highlights- Beautification

- OAA works with FUF, DPW and others to plant sidewalk gardens along the corridor and on adjacent side streets. To date OAA has planted 20 trees and about 10 sidewalk gardens on side streets near Ocean. A second round of landscaping is upcoming.
- OAA's projects encompass neighborhood volunteers.
- Corridor Design Process with the Planning Department includes planning Ocean Avenue transportation and landscape improvements from Phelan-Geneva to San Jose Avenue.

Planting day on Ocean Avenue

November 16, 2013



Events + Highlights- Marketing

- OAA established its visual brand with the creation of a logo, website and streetlight banners.
- OAA contributed the majority of the budget for the annual Ocean Avenue Festival since 2012.
- In this period, a more robust marketing program began its planning stages through discussion at the Street Life Committee and the full board.

Challenges

- Expanding volunteer base and retaining volunteer interest
- Dealing with vacancies to provide desired businesses as opposed to saturation of business types
- Development pressure on existing small business and mid-century small retail buildings
- Under-investment in upkeep and maintenance of existing retail buildings

Opportunities

- There is continued interest in a cleaner and greener corridor with more trees, sidewalk gardens, art and attractive pedestrian scale open spaces.
- Now that we have a grocery store, bank and hardware store, there is interest in managing the mix of businesses to better serve the needs of residents. This is an opportunity for the CBD.

Projects + Visions

- Establish a Farmers Market at Unity Plaza.
- Rezone two blocks of Ocean Avenue to extend retail services between the Balboa Park BART station's Ocean Avenue entrance and the Geneva-Ocean-Phelan intersection.
- Work with SF Public Works and Planning to implement landscaping improvements and a corridor development plan.
- Develop and promote projects in the OAA's Fifteen Year Plan for the CBD corridor.

Thank You

