



Lower Polk Community Benefit District



1007- 211/2011
SUBMITTED + PRESENTED

Legislative Overview

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

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



Review Process

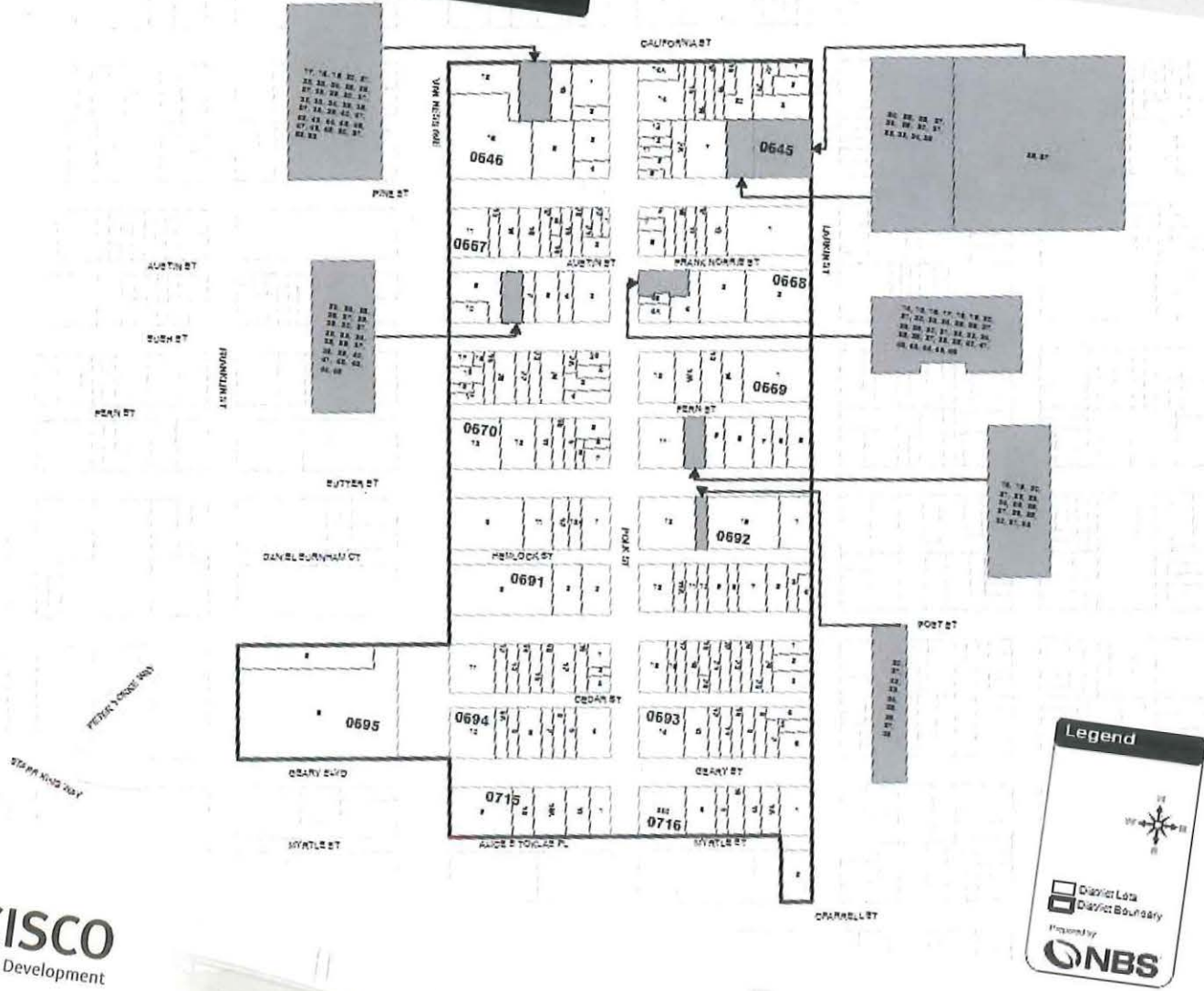
This resolution covers the Annual Report for FY 2014-2015

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



Parcel Map

LOWER POLK COMMUNITY BENEFIT DISTRICT



ToBCBD Formation

ToBCBD	Type	Assessment Budget*	Year Established	Expires
	Property-Based	\$ 846,049.54	2014	June 30, 2029

**budget identified in management plan*



ToB Operations

- **Staff**

- Executive Director – Christian Martin*

- **Service Areas**

- **Cleaning, Maintenance, and Safety Program**

- This program includes regular sidewalk sweeping, alley cleaning, refuse removal, steam cleaning, pressure washing, graffiti removal, greenspace maintenance, and a variety of safety efforts.

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

- This service area includes marketing the district, recruitment of new businesses, business retention, public space programming, and to create an overall neighborhood identity,

- **Management and Operations**

- 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.

**Christian Martin did not function as Executive Director in FY 14-15, the position was vacant until 11/2016. Chris Schulman, Board President, worked on behalf of the CBD for FY 14-15*



BENCHMARKS

OEWD's staff reviewed the following budget related benchmarks for LPCBD:

Benchmark 1 – Whether the variance between the budget amounts for each service category was within 10 percentage points from the management plan.

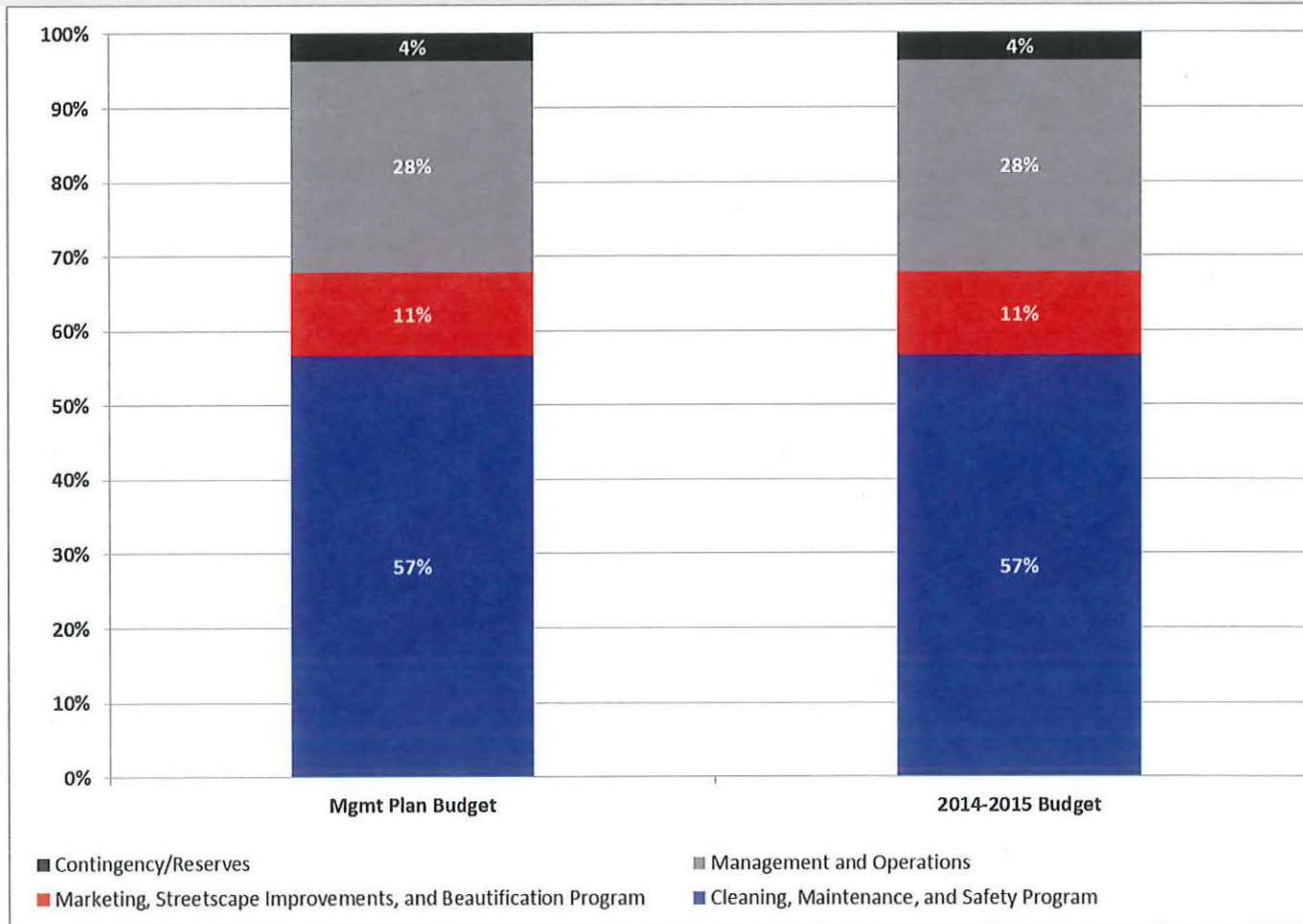
Benchmark 2 – Whether one percent (1%) of LPCBD's actuals came from sources other than assessment revenue.

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

Benchmark 4 - Whether CBD is indicating the amount of funds carried over from the current fiscal year and designating projects to be spent in the upcoming fiscal year.

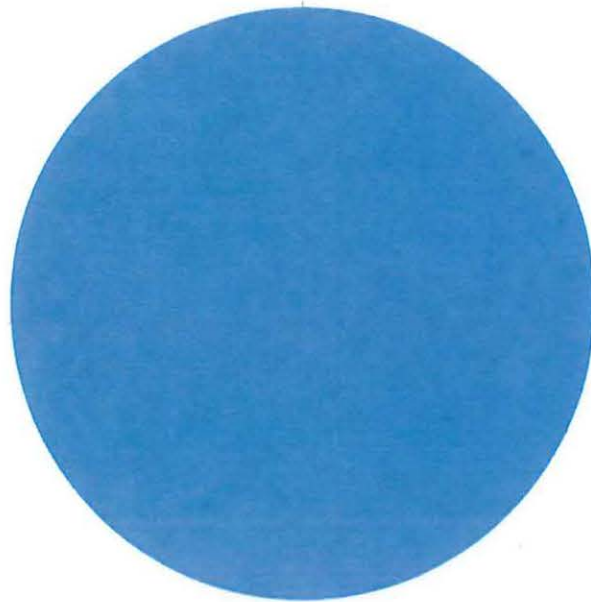


Management Plan vs. Annual Budgets



Assessment Revenue & Other Income

FY 2014 - 2015



Since LPCBD did not receive assessment revenue in FY 14-15 they met this benchmark.



Budget vs Actuals

Service Category	FY 2014-2015 Variance % Points
Cleaning, Maintenance, and Safety Program	-57%
Marketing, Streetscape Improvements, and Beautification Program	-11%
Management and Operations	+72%
Contingency/Reserves	-4%



Carryover

Designated Projects	FY 2015-2016
Cleaning, Maintenance, and Safety Program	\$437,009.46
Marketing, Streetscape Improvements, and Beautification Program	\$84,335.16
Management and Operations	\$214,671.31
Contingency/Reserves	\$30,667.33
Total Designated Amount	\$766,683.26



Recommendations for LPCBD

In completing the review of the LPCBD's annual report and financials, OEWD sets forth the following recommendations:

- LPCBD did not begin services in FY 14-15 due to not entering into a management contract with the City
- As a result, the CBD was not able to meet Benchmark 3.
- The CBD met 3 out of 4 benchmarks despite not receiving assessment dollars
- OEWD will work with Lower Polk CBD to ensure that it spends down FY 14-15 assessments in a timely manner in FY 15-16 and according to its management plan



Conclusion

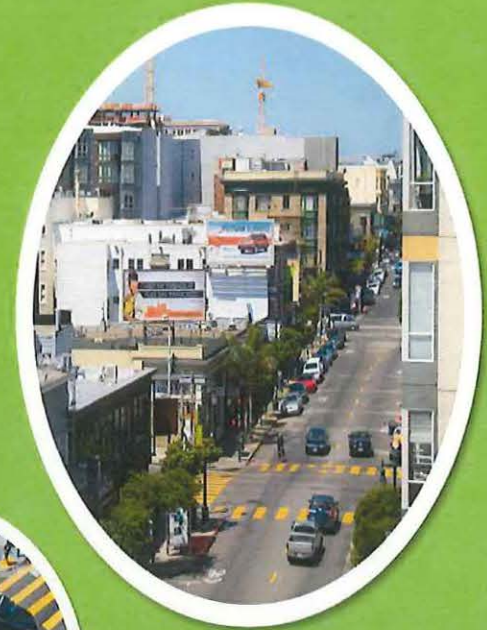
LP CBD has performed well in meeting benchmarks, but not in providing services:

- **OEWD has worked with LPCBD to bring them in compliance**
 - LPCBD has executed a management agreement with the City
 - LPCBD has hired an executive director
 - LPCBD has begun providing services in their district
 - LPCBD maintain an active board of directors and committee members
- **Maintained an active board of directors and committee members.**



Lower Polk

Community Benefit District



Fiscal Year 2014 -2015

Lower Polk Community Benefit District Formation FY 2014-2015

- Articles of Incorporation (filed with the California Secretary of State)
- Statement of Information (filed with the California Secretary of State)
- 501c3 status application completed
- Formed an Inclusive Board
- Established Bylaws
- City Vendor number applied for and received
- Business registration certificate
- Certificate of Insurance, with proper endorsements
- Completed Ethics Form 126 (completed by OEWD)
- Completed Management Agreement with OEWD
- Conducted open meetings
- Secured non-assessment funding



Fiscal Year 2014-2015 Summary

- LPCBD did not receive assessment funds to commence operations in FY 2014-2015.
- LPCBD did receive \$10,039 in contributions
- All FY 2014-2015 assessment funds were disbursed to the CBD in September of FY 2015-2016
- As a result the LPCBD proposes the following carryover disbursement: \$766,683
 - Cleaning, Maintenance, and Safety Program (\$437,009)
 - Marketing, Streetscape Improvements, and Beautification Program (\$84,335)
 - Management and Operations (\$214,671)
 - Contingency and Reserves (\$30,667)

Lower Polk CBD Board of Directors

Chris Schulman
Residential Property
Rep.

Bhavana Manchanda
Property Owner/Rep

Vahram Massenhian
CPMC
Community Non-
Profit

Al Casciato
Property
Owner/Rep

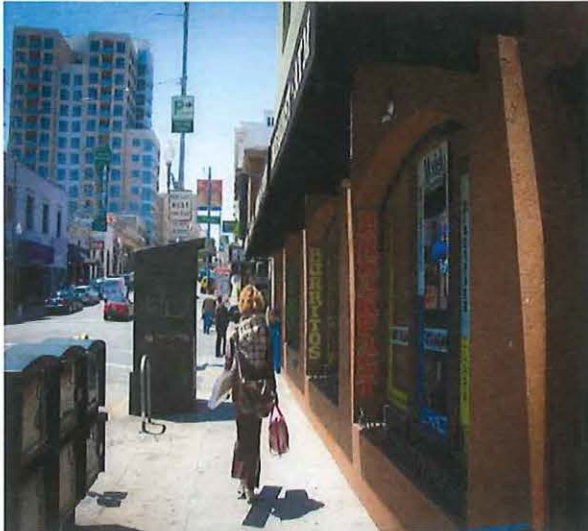
Lori Martens
Hi-Lo
Business Owner

Lindsey Fisher
Property Owner/Rep

Kenny Mead
Vertigo - Business
Owner
Property Owner Rep.

Raul Avila
Redding Elementary
Public School

Lower Polk CBD: Vision



- Clean and safe with places to gather and congregate including public or open space;
- Welcoming to diverse populations and reflects a mix of businesses that offer goods and services that meet the needs of the residents of the neighborhood;
- Promotes art and culture;
- Vibrant and viable neighborhood commercial district with flourishing small businesses and a community-friendly atmosphere;
- The neighborhood appearance reflects the local history and culture;
- Community-based partnerships address issues and serve as stewards for change.
- Capitalize on distinct architectural and street design to promote interesting experiences and qualities.
- Utilize funding from CPMC for capital projects focusing on neighborhood and community safety, health, and cleanliness issues and events (such as farmer's markets and block parties), and for streets and alleys improvements within the neighborhood

Lower Polk CBD: Boundaries

LOWER POLK COMMUNITY BENEFIT DISTRICT



Approximately 22 whole or partial blocks, the boundaries of the proposed LPCBD are:

- California St. from Larkin St. to Van Ness Ave. (South side only)
- Van Ness Ave. from California St. to Post St. (East side only)
- Post Street from Van Ness Ave. to Franklin Street (South Side only)
- Franklin St. from Post St. to Geary Blvd. (East side only)
- Geary Blvd. from Franklin St. to Van Ness Ave. (North side only)
- Van Ness Ave. from Geary Blvd. to Alice B. Toklas Pl. (East side only)
- Alice B. Toklas Pl. from Van Ness Ave. to Polk St. (North side only)
- Myrtle St. from Polk St. to Larkin St. (North side only)
- Larkin St. from Myrtle St. to California St. (West Side Only)

In addition to the above boundary description, the District boundaries also include

Assessor's Parcel No. 0716 -002, with the following boundaries:

- Myrtle Street from Larkin Street to Northwest corner of Assessor's Parcel No. 0716-002 (North side of Assessor's Parcel No. 0716 -002 only)
- Larkin Street from Myrtle Street to O'Farrell Street (West side of Assessor's Parcel No. 0716 -002 only)

Lower Polk CBD Priorities

- Community Ambassador Program
- Clean Streets Program
- Streetscape Improvements & Beautification
- Marketing and Community Outreach
- Community Events & Public Space Activation
- Business Attraction Support
- Advocacy
- Project Planning & Support

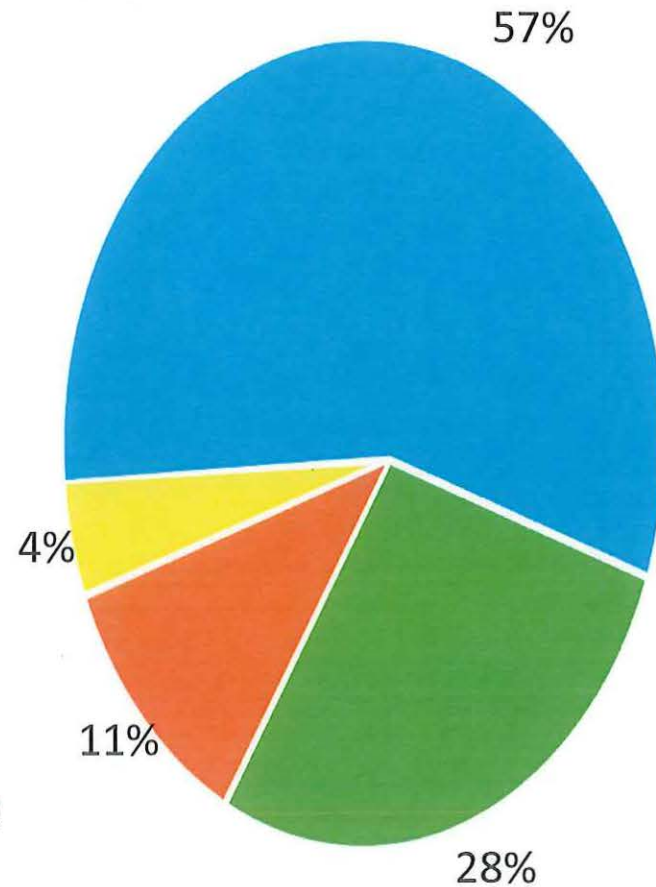


Lower Polk CBD Annual Budget

- 15 year-term
- Supplemental Community Services
- Baseline City Services Continue

• Budget: \$799,093.54

■ Cleaning Safety & Maintenance	\$478,675.00	(57%)
■ Operations & Management	\$240,900.00	(28%)
■ District Identity, Marketing & Events	\$95,700.00	(11%)
■ Contingency & Reserves	\$30,774.54	(4%)



Lower Polk CBD: Services

Cleaning, Maintenance

Removal of litter, debris and cigarette butts on sidewalks from the building line to 18" into the street gutter	Daily
Damp wiping and straightening of public fixtures (such as trash can lids and news racks)	Daily
Power Washing of sidewalks and alleys (spot cleaning of most heavily trafficked areas/spills/stains)	Regular as needed
Removal of graffiti on private property with property owner consent	Within 48 hours
Removal of graffiti from public infrastructure	As required
Removal of isolated weeds (larger concentrations of weeds removed by cutting)	As needed
Special Projects. Defined as painting of public infrastructure, cleaning of tree wells, or other similar projects	As requested

Corridor Safety

Safety Ambassadors

Foot patrol - all areas to serve as a reassuring presence and a visible deterrent	Daily
Continually engage members of the public to provide directions, recommendations and other information as necessary	Daily
Interact with merchants to share safety related information or learn about merchants concern's related to street level activity	Daily
Report any observed illegal behaviors to the police and document behavior	Daily

Marketing, Streetscape Improvements, and Beautification

Advocacy	As needed
Beautification	On going
Capital improvements	To be determined
Business retention activities	As needed
Business Attraction	As needed
Newsletters	Quarterly
Advertisements, brochures and website	As needed
Festivals, Art Walks, and other special events	To be determined
Banners and Holiday decorations	Annually

Social Service Outreach Ambassador

Engage visibly homeless individuals to identify possible needs that could put them on a path to housing. Individuals would be connected to available services offered by existing service providers	Daily
Analyze engagements with persons in need of social services	Daily
Work with San Francisco Police and service organizations to identify strategies to help individuals in need	Daily

Lower Polk CBD: Cleaning/ Services

- Sweeping sidewalks and plazas
- Graffiti abatement (public/private property)
- Removing trash/debris
- Removing feces, urine, and needles
- Power washing and spot cleaning
- Steam cleaning sidewalk
- Reporting of bulky items for DPW removal
- Weeding tree basins/sidewalk cracks and



Proposed Lower Polk CBD: Public Safety

Ambassador Services:

- Pedestrian safety
- Social service outreach
- Merchant outreach
- Way finding/Greetings/Visitor information

Dispatch Services

- LPCBD Service Request Phone Line for Lower Polk Community



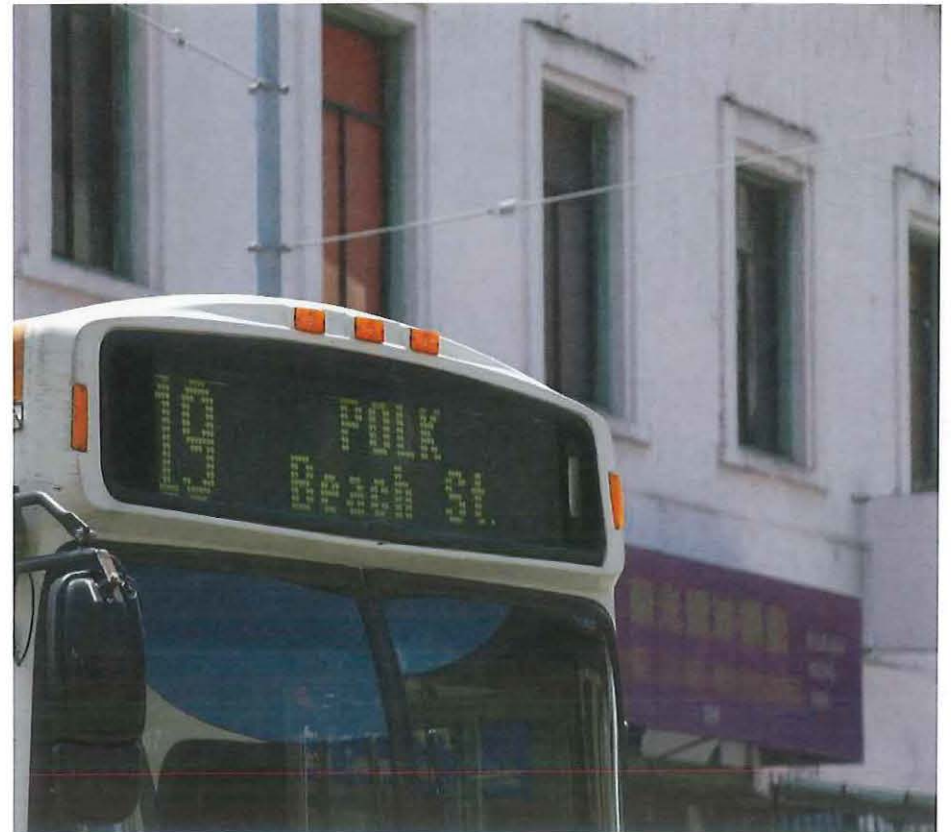
Proposed Lower Polk CBD: Economic Development

- Business attraction
- Business retention
- Technical support for merchants
- Leasing assistance
- Identify and fill vacancies



Lower Polk CBD: Management Services

- Day-to-day operations
- Advocacy
- Grant Writing
- Fundraising
- Fiscal Agent
- Administration



Proposed Lower Polk CBD: Marketing & Identity

- District Marketing/Branding
- Marketing Campaigns/Advertisements
- Outdoor Neighborhood Banners
- Community Events
- Public Space Activation
- Streetscape Improvements



Lower 
Polk

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