

File No. 210296 Committee Item No. 2
 Board Item No. _____

COMMITTEE/BOARD OF SUPERVISORS

AGENDA PACKET CONTENTS LIST

Committee: Land Use and Transportation Committee Date February 7, 2022

Board of Supervisors Meeting Date _____

Cmte Board

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|-------------------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Motion |
| <input type="checkbox"/> | <input type="checkbox"/> | Resolution |
| <input type="checkbox"/> | <input type="checkbox"/> | Ordinance |
| <input type="checkbox"/> | <input type="checkbox"/> | Legislative Digest |
| <input type="checkbox"/> | <input type="checkbox"/> | Budget and Legislative Analyst Report |
| <input type="checkbox"/> | <input type="checkbox"/> | Youth Commission Report |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Introduction Form |
| <input type="checkbox"/> | <input type="checkbox"/> | Department/Agency Cover Letter and/or Report |
| <input type="checkbox"/> | <input type="checkbox"/> | MOU |
| <input type="checkbox"/> | <input type="checkbox"/> | Grant Information Form |
| <input type="checkbox"/> | <input type="checkbox"/> | Grant Budget |
| <input type="checkbox"/> | <input type="checkbox"/> | Subcontract Budget |
| <input type="checkbox"/> | <input type="checkbox"/> | Contract/Agreement |
| <input type="checkbox"/> | <input type="checkbox"/> | Form 126 – Ethics Commission |
| <input type="checkbox"/> | <input type="checkbox"/> | Award Letter |
| <input type="checkbox"/> | <input type="checkbox"/> | Application |
| <input type="checkbox"/> | <input type="checkbox"/> | Public Correspondence |

OTHER (Use back side if additional space is needed)

- | | | |
|-------------------------------------|--------------------------|------------------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <u>Referral FYI Hearing 042221</u> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <u>OMCER PPT 042621</u> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <u>SBC PPT 042721</u> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <u>SFCC PPT 042621</u> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <u>DEM PPT 042621</u> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <u>PW Location Proposal 042621</u> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <u>BOMA PPT 042721</u> |
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Completed by: Erica Major Date February 3, 2022
 Completed by: Erica Major Date _____



Current State of Commercial Office Space and Economic Recovery

John R. Bryant

CEO, BOMA San Francisco

Building Owners & Managers Association

225 buildings in San Francisco

- 68 million square feet of office space

Contributing \$22 billion to California's economy

- SF's contribution is \$6.2 billion to the state economy
- Supports 40,542 jobs in the City

Building Ownership in San Francisco

- 80% pension funds
- 20% REIT's, LLP's, corporate ownership

BOMA Membership Includes:

- General Managers
- Property Managers
- Regional Managers
- Portfolio Managers
- Asset Managers
- Pension Funds/REITs
- Architects
- Engineers
- Building Service Providers

Commercial Real Estate Trends

Record high vacancy rates

- End of Q4 '19 – 3.7%
- End of Q4 '20 - 16.7%
- **End of Q1 '21 – 19.7%**

Sublease market has surpassed levels during dot com bust

- 8.4 million square feet
- Potential for plateau

Occupancy rates

- Up to 25% permitted
- Currently 10-15%

Factors Impacting Recovery

PROS

- Increased vaccinations
- School reopening's/childcare
- Strong VC investment
- Advantage as a technology and life science hub
- Entertainment and cultural center
- Desire for collaboration, community and increase in productivity

CONS

- Cost of doing business in SF
- Work from home affords companies global talent pools at significantly less cost
- The uncertainty of COVID-19 future impact
- Quality of life concerns
 - Street Encampments & Homelessness
 - Crime/Safety
 - Transportation
 - Housing

Office Safety

BOMA INTERNATIONAL

- First COVID-19 guidance document released in Jan. 2020
- Consultation with experts including CDC, ASHRAE and NIH
- Produced COVID re-entry guidelines
- Subsequent publishing of guidelines and best practices

BOMA San Francisco

- Coordinating with City leaders (DPH, OEWD)
- Keeping members current on latest guidelines and public health orders
- Promoting member collaboration on re-entry protocols

Future of Office Space & Downtown Environment

Office Space/Workplace Strategy Decisions

- **Healthy building certifications**
- **Flexible workspaces**
- **Hybrid work schedules**
- **HUB & Spoke Model**
- **Access to outdoor/green space**
- **Anticipated decrease in overall amount of leased office space**

Future of Downtown

- **Estimates suggest that up to 80% of retail and restaurants shut down during COVID-19, 50% may never reopen**
- **Need to create an enticing and welcoming environment**
 - **Community investment**
 - **Government needs to facilitate flexible use of space**
 - **Faster permitting process**

District 3-Public Works Current and Proposed Construction Locations



Legend

- Locations Currently Under Construction
- Proposed Near Term Construction Locations

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NOTE: All Public Works candidates are subject to substitution and schedule change pending available funding, visual confirmation, utility clearances and coordination with other agencies and are NOT guaranteed to be moved forward to construction. Unforeseen challenges such as increased work scope, changing priorities, cost increases or declining revenue may arise causing the Public Works Street Resurfacing Program candidates to be postponed or dropped from consideration.

District 6-Public Works Current and Proposed Construction Locations



Legend

- Locations Currently Under Construction
- Proposed Near Term Construction Locations

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Public Safety Data in NE SF

Comparison Pre-Pandemic and Recent Months

Calls for Service by District Jan-Feb 2020 & Jan-Feb 2021 Central, Southern and Tenderloin Districts							
District	2020		2020 Total	2021		2021 Total	Difference
	Jan	Feb		Jan	Feb		
Central District	1023	886	1909	621	578	1199	-37%
Southern District	836	772	1608	555	462	1017	-37%
Tenderloin District	645	656	1301	455	453	908	-30%
Grand Total	2504	2314	4818	1631	1493	3124	-35%

Calls for Service by Call Type Jan-Feb 2020 & Jan-Feb 2021 Central, Southern and Tenderloin Districts								
Final Call Type	Call Type Description	Central District		Southern District		Tenderloin		% Change Total > 18
		2020	2021	2020	2021	2020	2021	
000	Misc.	131	58	75	60	84	61	-38%
100A	Audible Alarm	9	17	7	5	1	2	41%
1030	PD view stolen auto/wanted person	13	8	44	24	22	28	-24%
187	Homicide					1		
211	Robbery	22	21	26	11	34	20	-37%
212	Strong-arm Robbery	50	12	28	11	29	9	-70%
219	Stabbing	4	1	6	3	18	13	-39%
221	Person w a Gun	7	2	18	9	8	16	-18%
222	Person w a Knife	18	11	13	12	20	12	-31%
240	Assault	102	49	99	45	104	66	-48%
240DV	Assault, Domestic Violence	9	13	28	6	15	13	-38%
245	Aggravated Assault	25	11	18	9	25	21	-40%
261	Sexual Assault/Rape	8	2	13	9	5	7	-31%
405	Citizen holding a prisoner	114	15	7	3	30	6	-84%
418	Fight (no weapons)	61	42	56	24	62	33	-45%
418DV	Fight (no weapons), Domestic	11	12	10	5	9	8	-17%
459	Burglary	126	151	127	140	45	45	13%
470	Fraud	71	26	38	35	26	21	-39%
487	Grand Theft	84	22	37	24	25	9	-62%
488	Petty Theft	242	114	95	54	81	52	-47%
496	Stolen Property	11	5	34	10	15	7	-63%
5150	Mental Health Detention	5	5	12	8	6	2	-35%
520	Aided Case	5	3	5	5	23	8	-52%
528	Fire (assist)	6	3	6	6	3	6	0%
585	Traffic Stop	38	19	39	24	32	12	-50%
594	Vandalism	93	71	64	59	37	29	-18%
601	Trespasser	9	6	10	7	3	3	-27%
602	Person breaking in	5	6	5	6	2	1	8%
603	Prowler	5	6	4	5	2	1	9%
650	Threats	28	20	30	18	18	9	-38%
800	Mentally Disturbed Person	22	18	15	11	8	8	-18%
801	Attempted suicide	18	20	57	25	18	18	-32%
807	Missing juvenile	1	3	14	3	3	2	-56%
809	Missing person	14	11	45	28	22	23	-23%
851	Stolen vehicle	65	74	78	88	38	34	8%
852	Auto break-in	242	214	161	69	30	16	-31%
905	Meet w city employee	44	33	60	54	56	49	-15%
909	Interview a member of the public	31	14	31	13	30	18	-51%
910	Well-being check	17	16	25	21	21	20	-10%
916	Suspicious vehicle	13	8	9	6	16	15	-24%
917	Suspicious person	57	14	60	15	133	63	-63%
ARR	Arrest	11	2	30	6	76	77	-27%



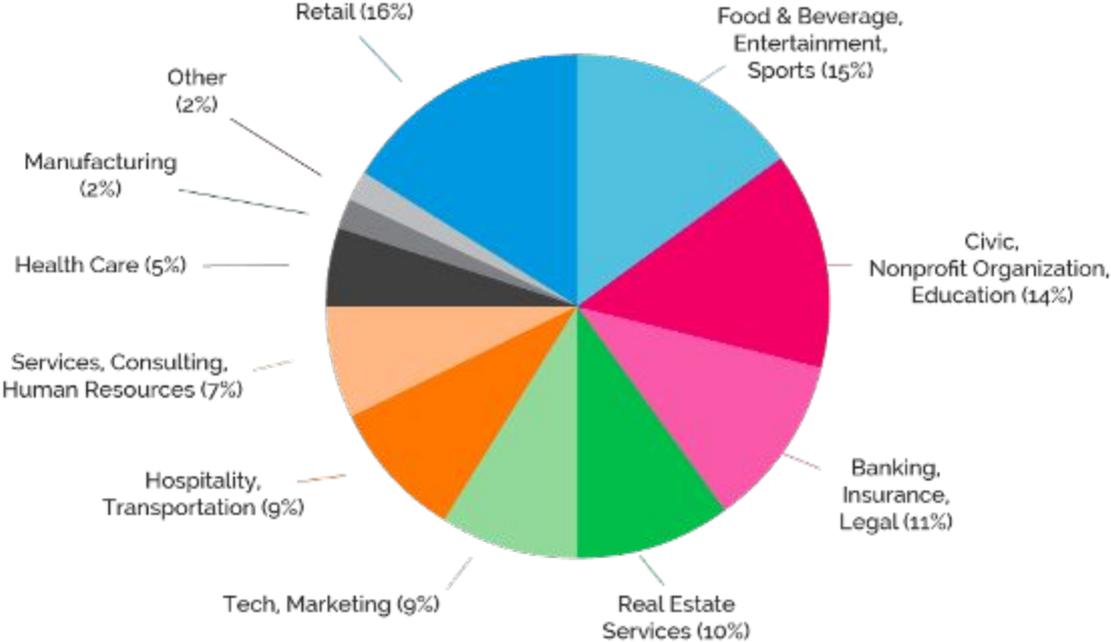
OUR CITY. **YOUR BUSINESS.**

San Francisco Chamber of Commerce

Rodney Fong, President & CEO

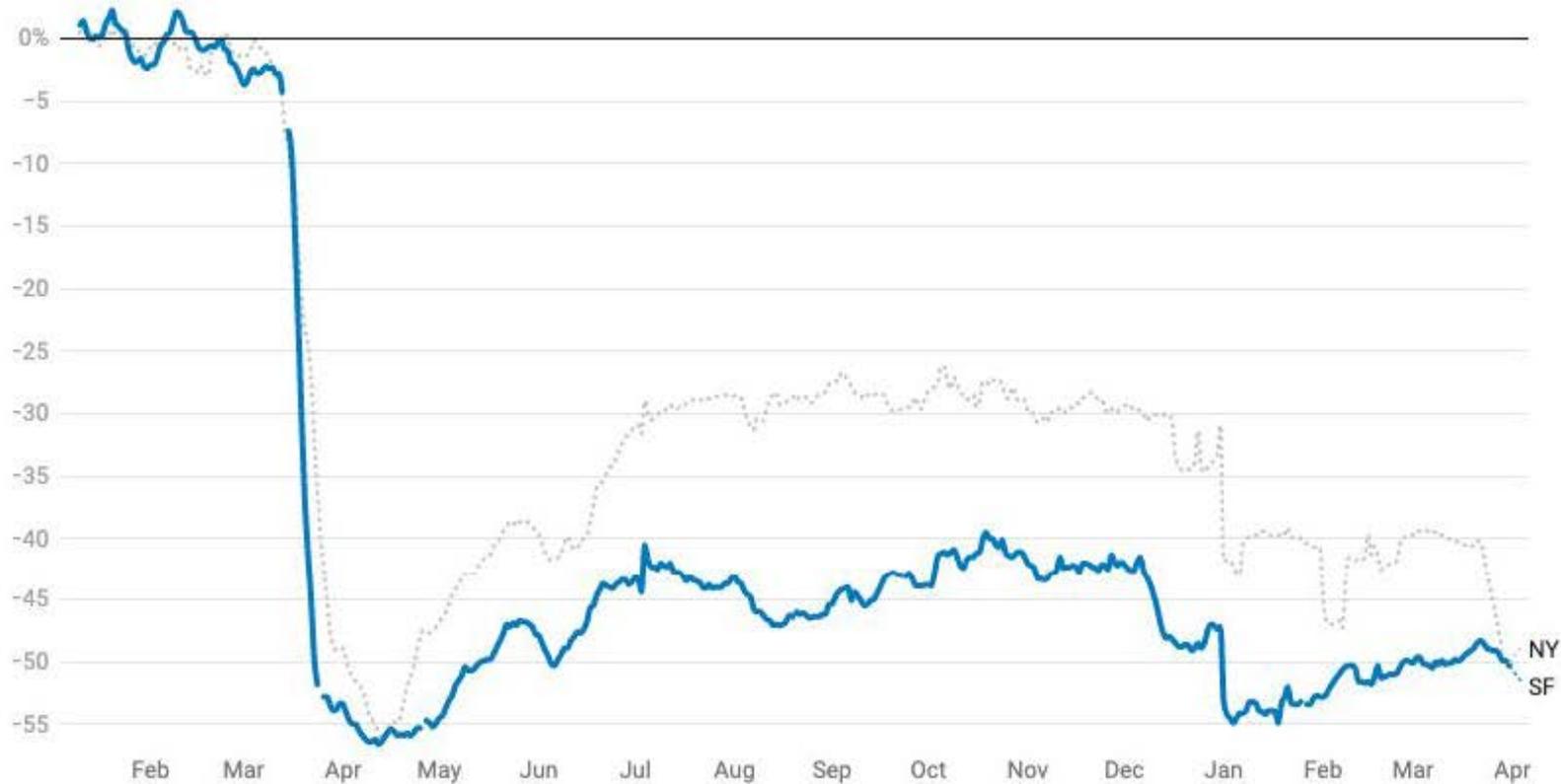
Membership

80% of which are Small Business



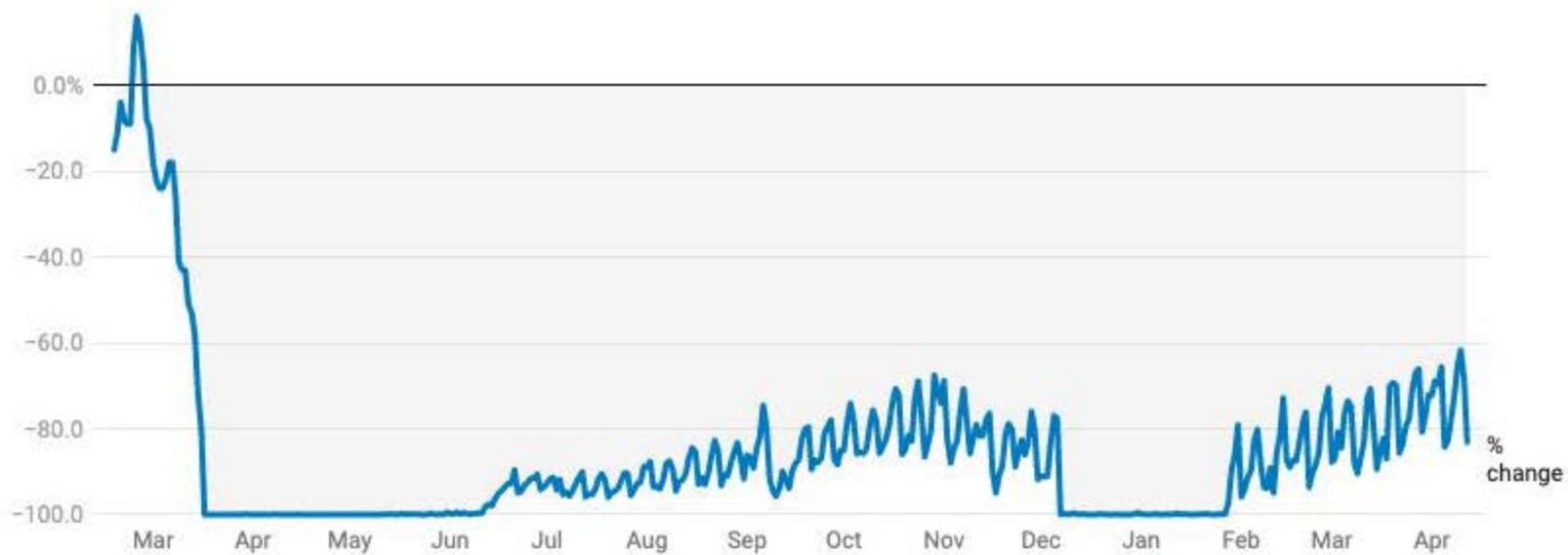
Percent of Small Businesses Open

% change compared to pre-covid baseline



Seated Diners

% change compared to YTD 2019

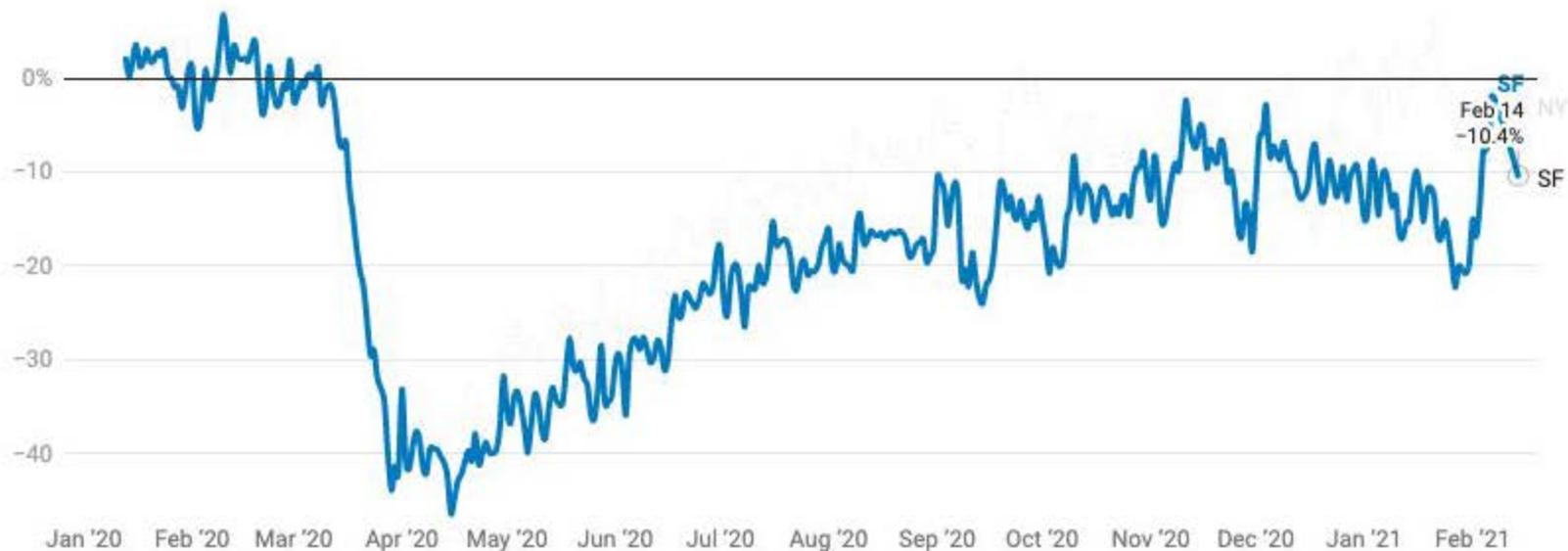


Source: OpenTable • [Get the data](#)



Change in Consumer Spending

% change compared to pre-covid baseline



Source: Affinity • [Get the data](#)



Thank You

Rodney Fong

President & CEO
San Francisco Chamber of Commerce
rfong@sfchamber.com
sfchamber.com

Emily Abraham

Interim Director, Public Policy
San Francisco Chamber of Commerce
eabraham@sfchamber.com
sfchamber.com



Presentation Title

April 26, 2021

Land Use and
Transportation Committee

Regina Dick-Endrizzi
Director, Office of Small Business

Office of Small Business - Business Assistant Center



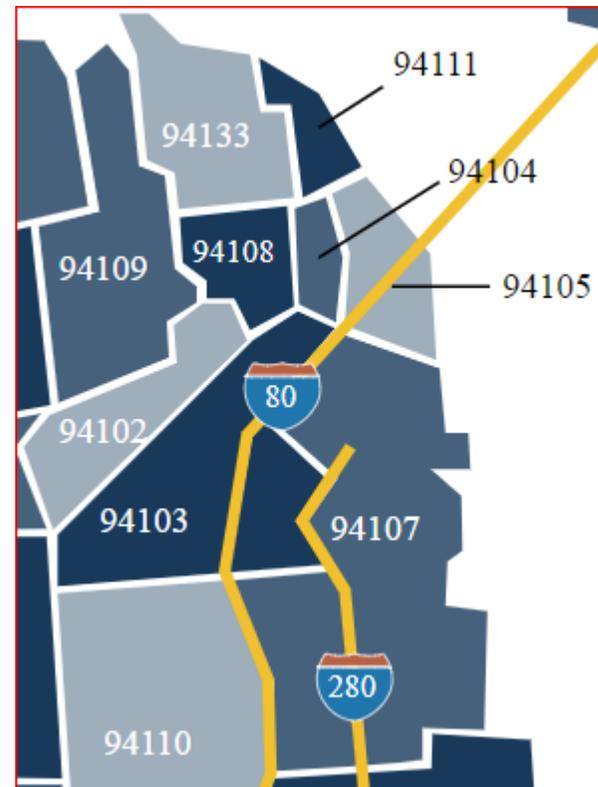
- Frontline assistance to small business.
 - Assistance provided by email and phone, listed on OEWD COVID-19 website
- 7015 businesses assisted: March 2020 / March 2012
- Zip Codes: 94102, 94103, 94104, 94105, 94107 and 94111
 - 1024 business assisted (15% of 7015)

Office of Small Business - Business Assistant Center



- Zip Codes: 94102, 94103, 94104, 94105, 94107 and 94111

Location (by Zip Code)	TOTAL	Percentage
94102	265	26%
94103	314	34%
94104	94	9%
94105	80	8%
94107	163	16%
94111	108	11%
Total:	1,024	100%



Office of Small Business - 94102 - Top Five Business Types (NAICS)



94102
Food Services = 80
Certain Services = 50
Retail Trade = 30
Private Education and Health Services = 28
Professional, Scientific & Technical Services = 17

COVID Tags	94102
Reopening	36
Financial Assistance	200
General Guidance	101
Real Estate Guidance	22
Workforce Guidance	29
Shared Spaces Program	13
RFQ 999 Meal Service	3
Business Closing	3

Type of Service Requested	94102
Pre Start-Up	7
Start-Up	13
Existing	237
Expanding	1
Relocating	2
Business Acquisition	2
Closing	6
TOTAL:	265

Race/Ethnicity	94102
African American	4
Arab	6
Asian	64
Caucasian or White	64
Latino or Hispanic	14
Multiracial	1
Other	3
P.I. or Native Hawaiian	0
Unknown	109
TOTAL:	265

Office of Small Business - 94103 - Top Five Business Types (NAICS)



94103
Food Services = 93
Retail Trade = 60
Professional, Scientific & Technical Services = 31
Certain Services = 27
Private Education and Health Services / Manufacturing = 20

COVID Tags	94103
Reopening	38
Financial Assistance	155
General Guidance	151
Real Estate Guidance	33
Workforce Guidance	24
Shared Spaces Program	5
RFQ 999 Meal Service	3
Business Closing	2

Type of Service Requested	94103
Pre Start-Up	14
Start-Up	19
Existing	268
Expanding	4
Relocating	1
Business Acquisition	5
Closing	3
TOTAL:	314

Race/Ethnicity	94103
African American	26
Arab	5
Asian	59
Caucasian or White	58
Latino or Hispanic	25
Multiracial	4
Other	3
P.I. or Native Hawaiian	0
Unknown	134
TOTAL:	314

Office of Small Business - 94104 - Top Five Business Types (NAICS)



94104
Professional, Scientific & Technical Services = 23
Food Services = 21
Certain Services = 20
Private Education and Health Services = 10
Arts, Entertainment and Recreation = 4

COVID Tags	94104
Reopening	11
Financial Assistance	57
General Guidance	35
Real Estate Guidance	14
Workforce Guidance	9
Shared Spaces Program	1
RFQ 999 Meal Service	0
Business Closing	1

Type of Service Requested	94104
Pre Start-Up	0
Start-Up	3
Existing	84
Expanding	2
Relocating	2
Business Acquisition	0
Closing	3
TOTAL:	94

Race/Ethnicity	94104
African American	4
Arab	0
Asian	12
Caucasian or White	16
Latino or Hispanic	7
Multiracial	3
Other	0
P.I. or Native Hawaiian	6
Unknown	46
TOTAL:	94

Office of Small Business - 94105 - Top Five Business Types (NAICS)



94105
Professional, Scientific & Technical Services = 21
Food Services = 13
Certain Services = 13
Administrative and Support Services = 8
Retail Trade = 5

COVID Tags	94105
Reopening	7
Financial Assistance	41
General Guidance	32
Real Estate Guidance	12
Workforce Guidance	15
Shared Spaces Program	1
RFQ 999 Meal Service	1
Business Closing	2

Type of Service Requested	94105
Pre Start-Up	3
Start-Up	3
Existing	69
Expanding	2
Relocating	0
Business Acquisition	1
Closing	2
TOTAL:	80

Race/Ethnicity	94105
African American	0
Arab	0
Asian	5
Caucasian or White	20
Latino or Hispanic	4
Multiracial	1
Other	0
P.I. or Native Hawaiian	0
Unknown	50
TOTAL:	80

Office of Small Business - 94107 - Top Five Business Types (NAICS)



94107
Food Services = 27
Professional, Scientific & Technical Services = 21
Retail Trade = 18
Manufacturing = 16
Certain Services / Private Education and Health Services = 14

COVID Tags	94107
Reopening	23
Financial Assistance	94
General Guidance	72
Real Estate Guidance	12
Workforce Guidance	27
Shared Spaces Program	1
RFQ 999 Meal Service	1
Business Closing	3

Type of Service Requested	94107
Pre Start-Up	4
Start-Up	10
Existing	143
Expanding	2
Relocating	0
Business Acquisition	2
Closing	2
TOTAL:	163

Race/Ethnicity	94107
African American	3
Arab	2
Asian	11
Caucasian or White	56
Latino or Hispanic	5
Multiracial	2
Other	4
P.I. or Native Hawaiian	1
Unknown	79
TOTAL:	163

Office of Small Business - 94111 - Top Five Business Types (NAICS)



94111
Food Services = 28
Professional, Scientific & Technical Services = 23
Certain Services = 9
Private Education and Health Services = 9
Retail Trade / Information = 7

COVID Tags	94111
Reopening	13
Financial Assistance	61
General Guidance	45
Real Estate Guidance	15
Workforce Guidance	8
Shared Spaces Program	1
RFQ 999 Meal Service	2
Business Closing	2

Type of Service Requested	94111
Pre Start-Up	4
Start-Up	8
Existing	89
Expanding	2
Relocating	1
Business Acquisition	0
Closing	4
TOTAL:	108

Race/Ethnicity	94111
African American	0
Arab	0
Asian	5
Caucasian or White	38
Latino or Hispanic	7
Multiracial	0
Other	0
P.I. or Native Hawaiian	0
Unknown	58
TOTAL:	108

Office of Small Business -



Addition Notes:

5 - zip codes included businesses in the Professional, Scientific & Technical Services NAICS

Office based small businesses not covered by Commercial Eviction Moratorium and with no rent relief:

- Considering having to close.
- Downsizing office space and have employees rotate coming into the office.

Additional Notes:



Business Industry Type

Administrative and Support Services

(Janitorial services, locksmiths, security, travel agencies, tour operators, employment agencies, venue & events)

Arts, Entertainment and Recreation

Artist, writers, performers, amusement arcades, event promoters

Certain Services

(Beauty, hair, nail salons; estheticians; pet care services; dry cleaning and laundry services; non-profits; appliance & auto repair and maintenance)

Food Services

(Caterers, mobile food facilities, bars, restaurants, cafes, farmer markets, cottage food operators, pop ups)

Information

(Blog writers, social media platforms, publishers, motion pictures and video production and distribution)

Private Education and Health Services

(Child care center, daycare, tutoring service, massage, chiropractors, psychotherapists)

Professional, Scientific & Technical Services

(Legal services; accounting services; architectural and engineering services; landscaping services; consulting services; photography studio)

Retail Trade

(Grocery stores; Convenient stores; Markets; Florist; Jewelry stores; Bookstores; Art dealers, studios and galleries; Baked goods stores; Furniture stores; E-commerce)

Additional Notes:

Pre Start-Up	Considering starting a business, need to do research and planning
Start-Up	0-1 years in business, need to register, need info on additional requirements, need financing or technical assistance
Existing	1+ years in business, needs financing, biz management assistance, info on business programs, contracting, etc.
Expanding	Looking to grow business, including capital improvement, new concept/product, new location, new hires
Relocating	Existing business seeking to move to new location
Business Acquisition	Business has transferred ownership, sold, or bought an existing business new location
Closing	Business is closing, will close, or has closed

The Office Market and the City's Economic Recovery



CITY & COUNTY OF SAN FRANCISCO

Office of the Controller

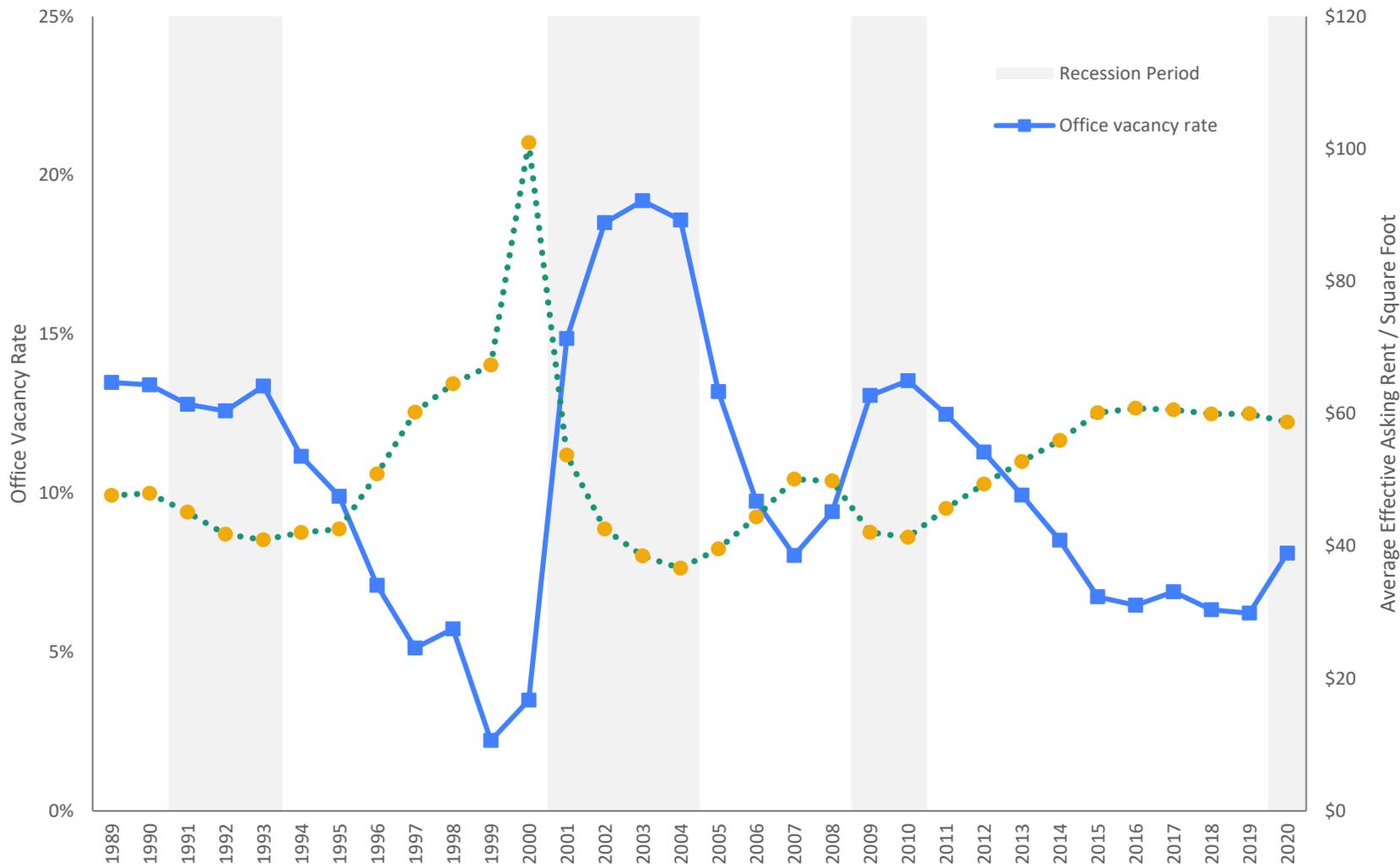
Ted Egan, Ph.D, Chief Economist

April 26, 2021

A Long-Term View of Office Vacancy and Rents

2

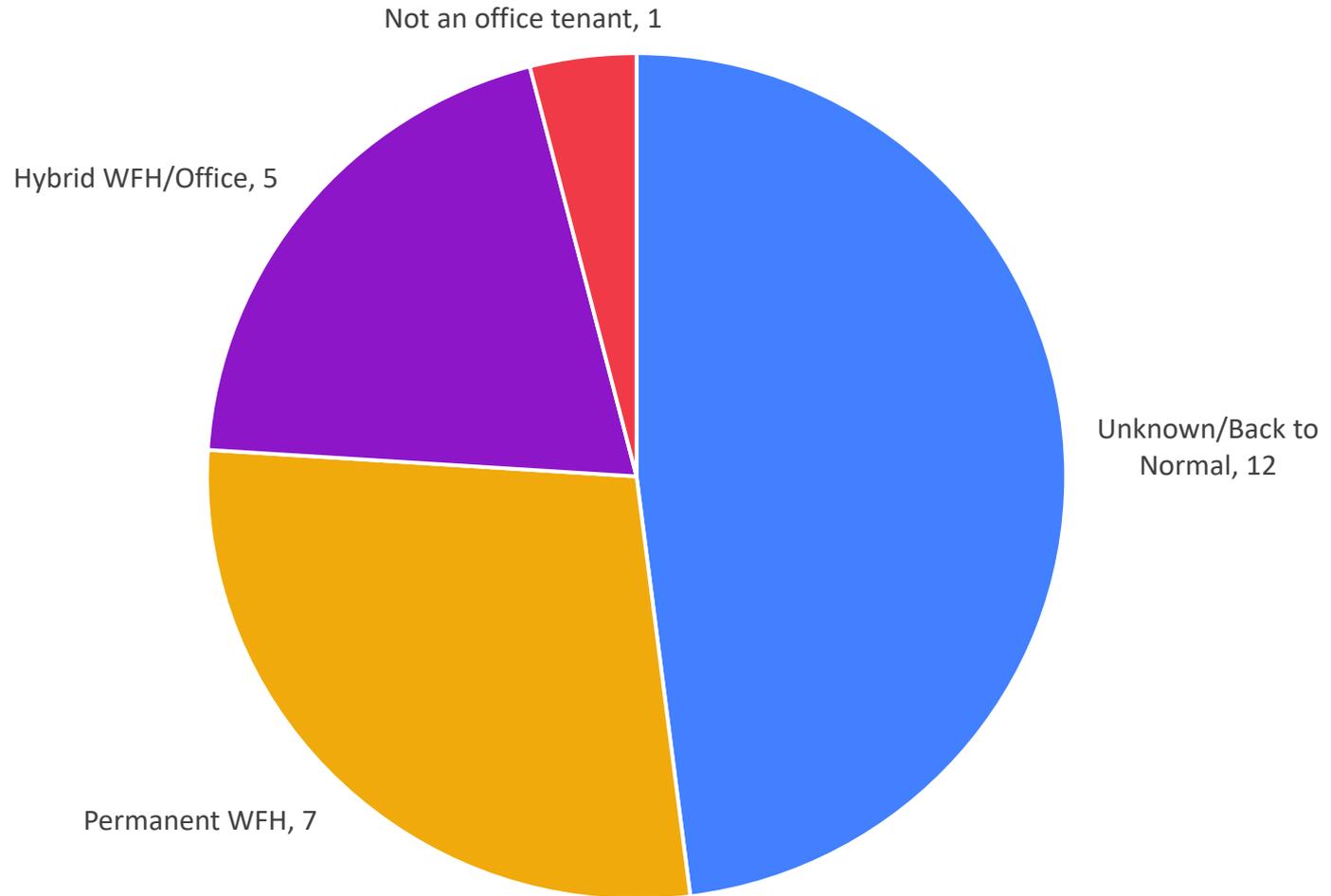
Historical Trends in San Francisco Office Vacancy and Effective Office Rent: 1989-2020



Future Office Plans of Largest Business Taxpayers

3

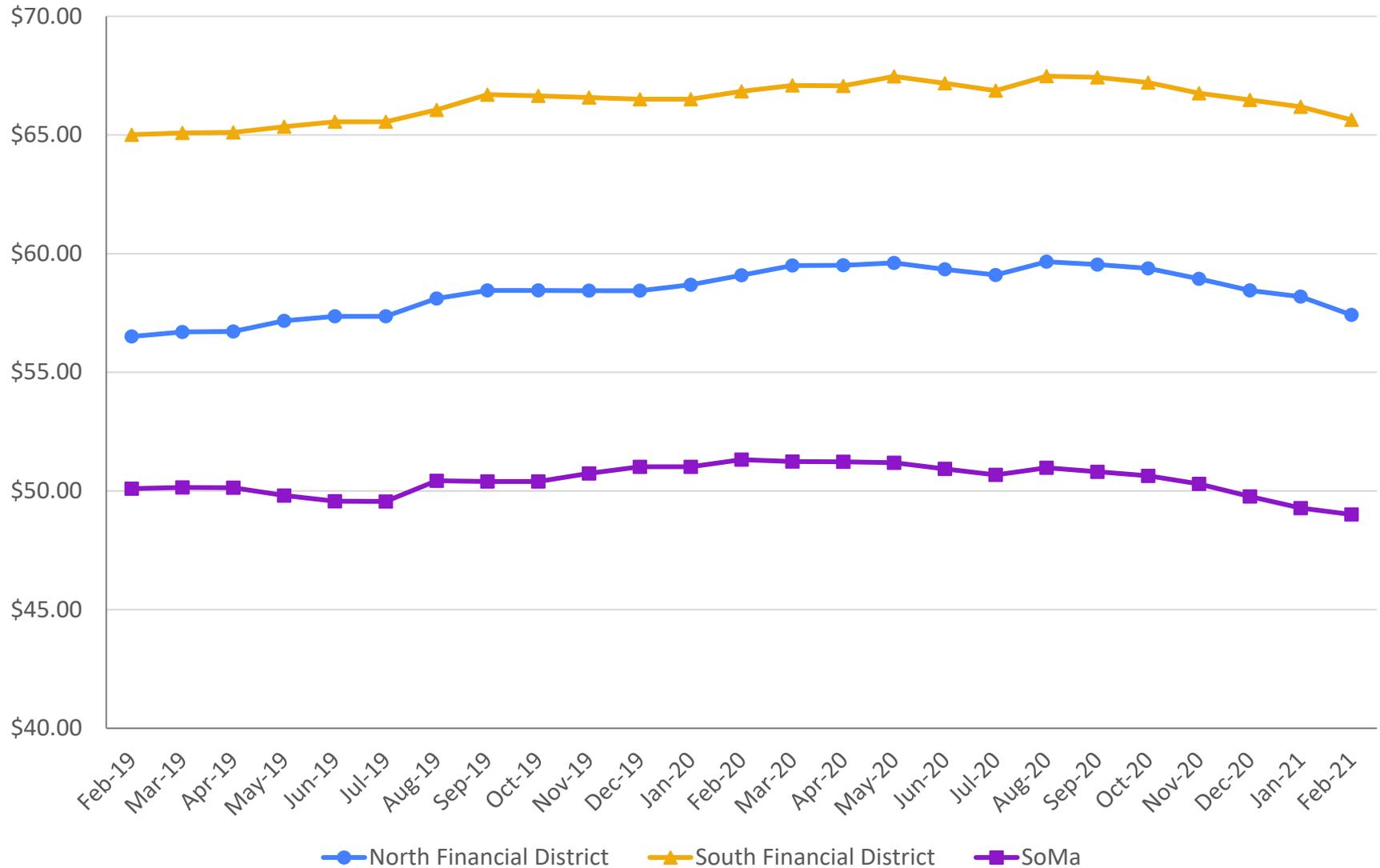
Post-Pandemic Work-at-Home Plans of San Francisco's 25 Largest Business Tax Payers



Recent Rent Trends in 3 SF Submarkets

4

Recent Trends in Office Effective Asking Rent / SqFt, Feb 2019-Feb 2021

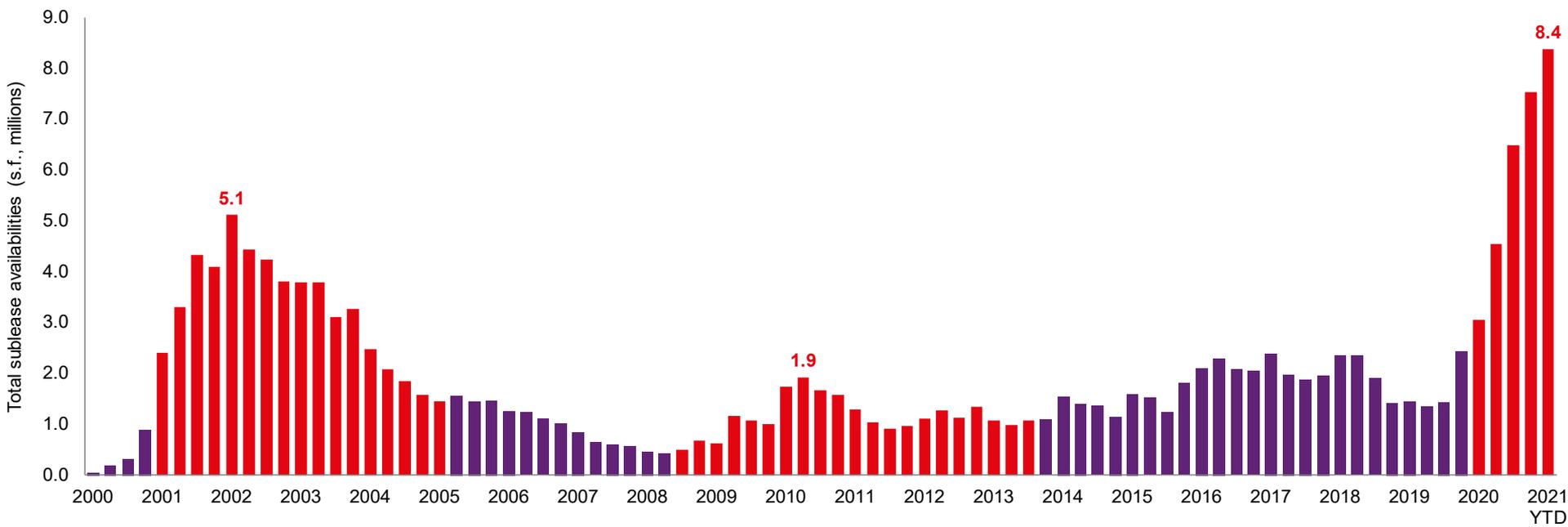


“At \$54.09 per square foot, San Francisco’s effective rent declined 1.5% in the quarter (2020Q4) but declined 0.6% over the year (2020).

“The current Moody’s Analytics REIS forecast, however, shows San Francisco’s average effective office rent declining 15% in 2021 and 1.8% in 2022.”

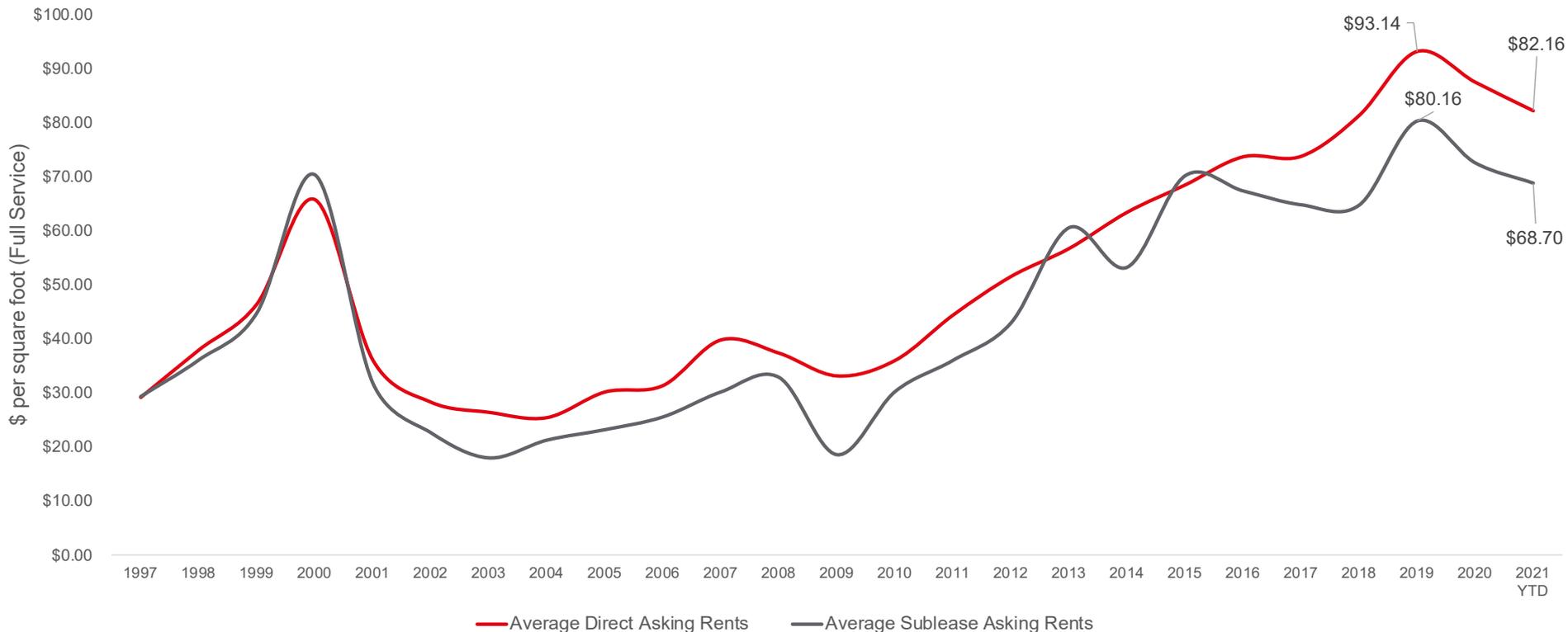
JLL: Office Sublease Space at Record High Levels

6



JLL: SF Asking Rent Trends: Direct vs. Sublease

7



Bright Spots? Office Touring Data

8

San Francisco has rebounded by 95 percent

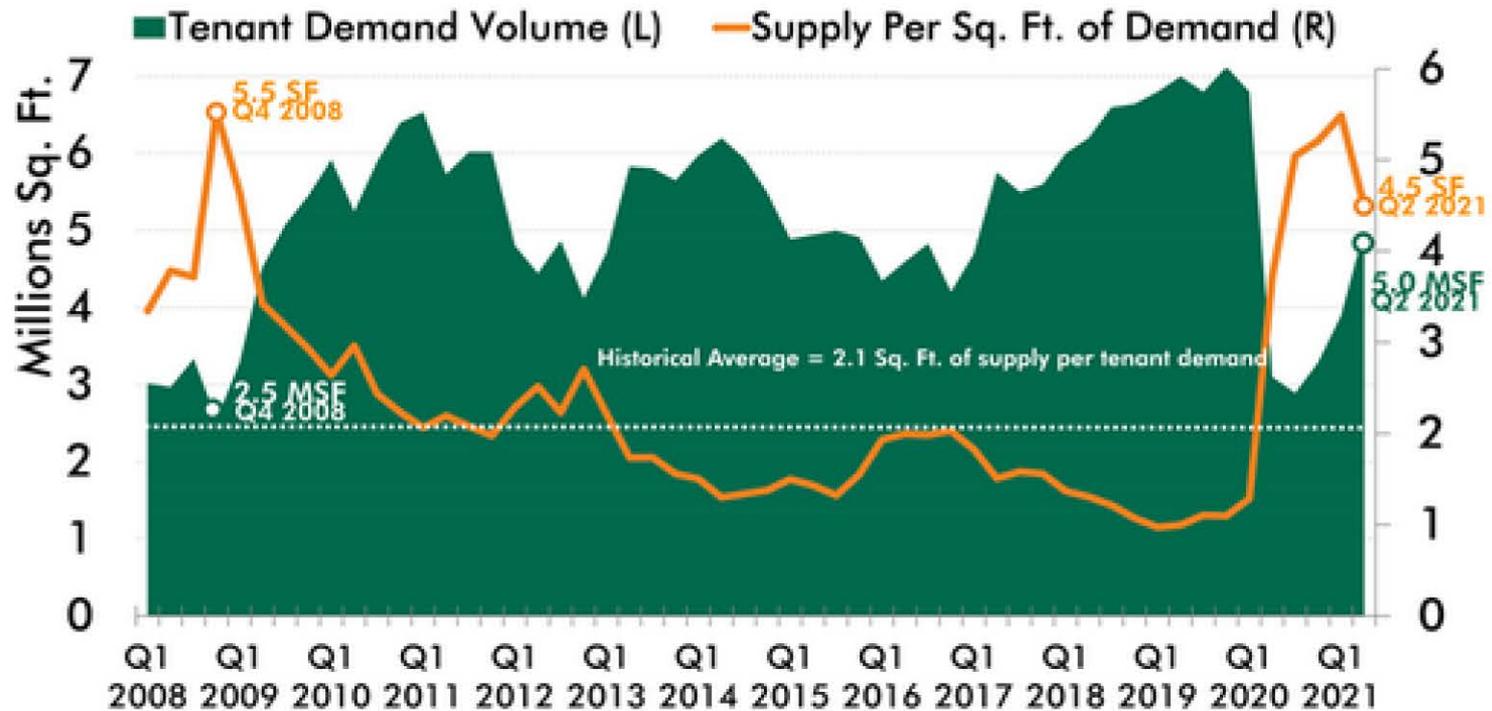
After experiencing the lowest bottom of all markets with virtually no office tenant demand in mid-2020, the San Francisco VODI saw strong growth over each of the last three months, increasing 38 VODI points from 15 in November to 53 in February - only three index points (5%) from pre-crisis February 2020 levels (56). As of February 2021, almost all (94%) of the demand lost in the early pandemic days has been recovered in San Francisco, the highest of all gateway markets.

VTS Office Demand Index by Market

■ Pre-crisis to current ■ Growth from last month



San Francisco Tenants in the Market (demand) vs. Available Space (supply)



- Many large office tenants in San Francisco are rethinking their work-from-home policies, and in some cases reducing the amount of office space they lease in the city.
- This reduction in office demand seems to be more pronounced in San Francisco than in most other cities. It will contribute to a higher office vacancy rate, fewer employees returning to the office after the pandemic, and perhaps a slower economic recovery for the city.
- However, it is highly unlikely that this will be a permanent change. Based on past experience, office rents are likely to decline until new tenants are secured, although this adjustment process may take some time.
- Signs of rising tenant interest, and office touring, are part of this market adjustment process. It may result in San Francisco becoming affordable to office tenants that have been priced out of the city in the past.
- Additionally, are macroeconomic factors that should favor the city, including low interest rates, a strong national recovery, and a favorable environment for venture capital funding.

BOARD of SUPERVISORS



City Hall
1 Dr. Carlton B. Goodlett Place, Room 244
San Francisco 94102-4689
Tel. No. (415) 554-5184
Fax No. (415) 554-5163
TDD/TTY No. (415) 554-5227

MEMORANDUM

TO: Kate Sofis, Director, Office of Economic and Workforce Development
Dr. Grant Colfax, Director, Department of Public Health
Patrick O'Riordan, Director, Department of Building Inspection
Ben Rosenfield, City Controller, Office of the Controller
Regina Dick-Endrizzi, Director, Small Business Commission

FROM: Erica Major, Assistant Clerk, Land Use and Transportation Committee

DATE: April 22, 2021

SUBJECT: HEARING MATTER INTRODUCED

The Board of Supervisors' Land Use and Transportation Committee has received the following hearing request, introduced by Supervisor Safai on March 16, 2021:

File No. 210296

Hearing to review the economic impact of vacant office buildings in San Francisco, specifically in the Financial District, SOMA, and Embarcadero, due to the initial shelter-in-place ordinance, private company policies that promote working from home, and safety measures put in place to promote a return to in-person business; and requesting the Office of Economic and Workforce Development, Department of Public Health, Department of Building Inspection, Controller's Office, Small Business Commission and the City's Economist to report.

If you have any comments or reports to be included with the file, please forward them to me at the Board of Supervisors, City Hall, Room 244, 1 Dr. Carlton B. Goodlett Place, San Francisco, CA 94102.

cc: J'Wel Vaughan, Office of Economic and Workforce Development
Anne Taupier, Office of Economic and Workforce Development
Lisa Pagan, Office of Economic and Workforce Development
Greg Wagner, Department of Public Health
Dr. Naveena Bobba, Department of Public Health
Sneha Patil, Department of Public Health
Arielle Fleisher, Department of Public Health
Patty Lee, Department of Building Inspection
John Murray, Department of Building Inspection
Todd Rydstrom, Office of the Controller

Print Form

Introduction Form

By a Member of the Board of Supervisors or Mayor

Time stamp
or meeting date

I hereby submit the following item for introduction (select only one):

- 1. For reference to Committee. (An Ordinance, Resolution, Motion or Charter Amendment).
- 2. Request for next printed agenda Without Reference to Committee.
- 3. Request for hearing on a subject matter at Committee.
- 4. Request for letter beginning : "Supervisor [] inquiries"
- 5. City Attorney Request.
- 6. Call File No. [] from Committee.
- 7. Budget Analyst request (attached written motion).
- 8. Substitute Legislation File No. []
- 9. Reactivate File No. []
- 10. Topic submitted for Mayoral Appearance before the BOS on []

Please check the appropriate boxes. The proposed legislation should be forwarded to the following:

- Small Business Commission
- Youth Commission
- Ethics Commission
- Planning Commission
- Building Inspection Commission

Note: For the Imperative Agenda (a resolution not on the printed agenda), use the Imperative Form.

Sponsor(s):

Ahsha Safai

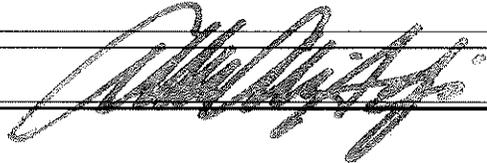
Subject:

Current State of Commercial Office Space and Economic Recovery

The text is listed:

Hearing request is to review the economic impact of vacant office buildings San Francisco specifically in the Financial District, SOMA, and Embarcadero due to the initial shelter-in-place ordinance and the private company policies that promote working from home and the safety measures put in place to promote a return to in-person business. The following City Departments are requested: Office of Economic and Workforce Development, Department of Public Health, Department of Building Inspection, Controller's Office, Small Business Commission, the City's Economist

Signature of Sponsoring Supervisor:



For Clerk's Use Only