



Castro/Upper Market Community Benefit District



Legislative Overview

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

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



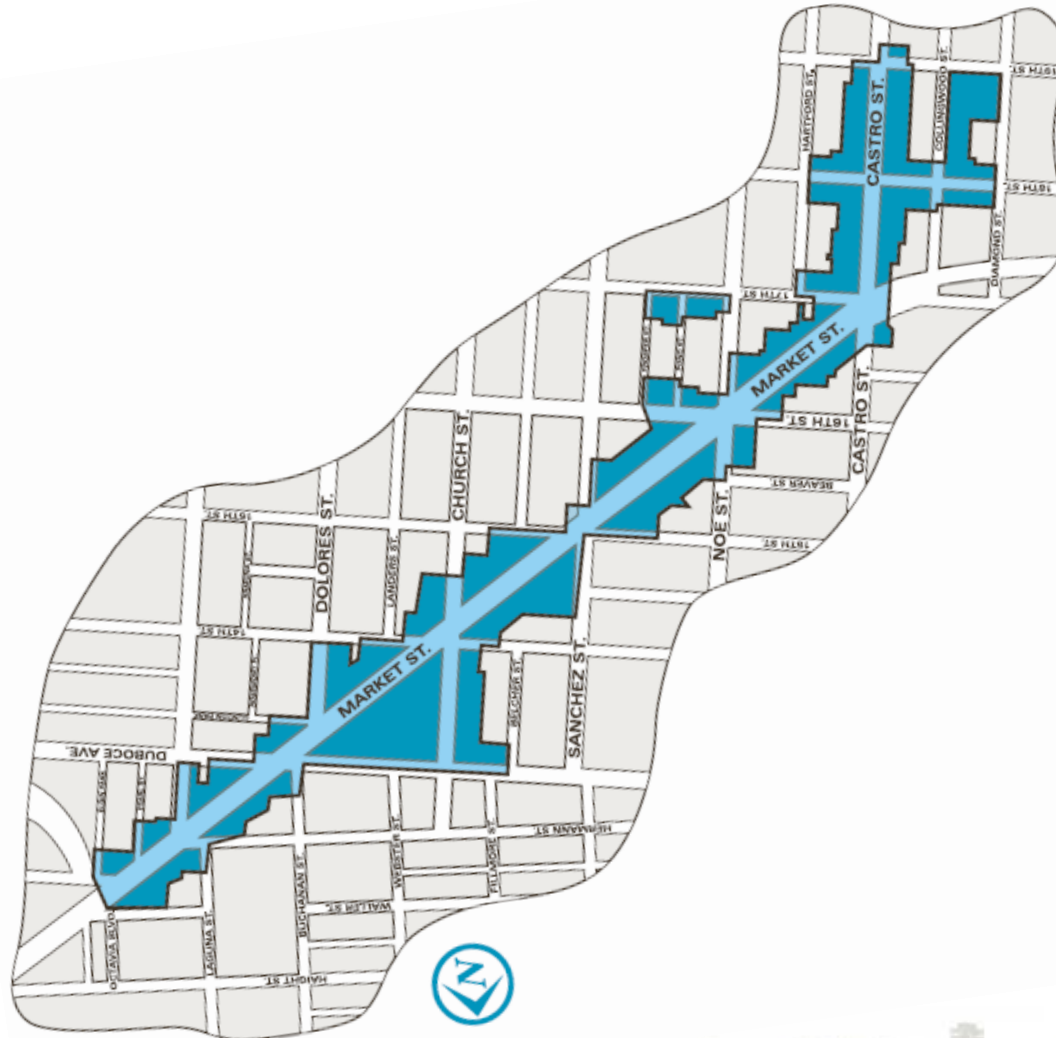
Review Process

This resolution covers Annual Report for FY 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 Supervisors with a summary memo.



Parcel Map



Castro/Upper Market CBD Formation

Castro/Upper Market CBD	Type	Assessment Budget*	Year Established	Expires
	Property-Based	\$ 413,500	2005	June 30, 2020

**budget identified in management plan*



Castro/Upper Market CBD Operations

Staff

- Executive Director – Andrea Aiello

Service Areas

– Public Rights of Way and Sidewalk Operations (PROWSO)

- Includes street maintenance, beautification, and safety services.
 - “Clean Team” is funded through this program.
 - Patrol Special officer patrols the neighborhood seven nights week.

– District Identity and Street Improvements (DISI)

- Includes marketing, public relations and street enhancements.

– Administration and Corporate 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 Castro/Upper Market 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.

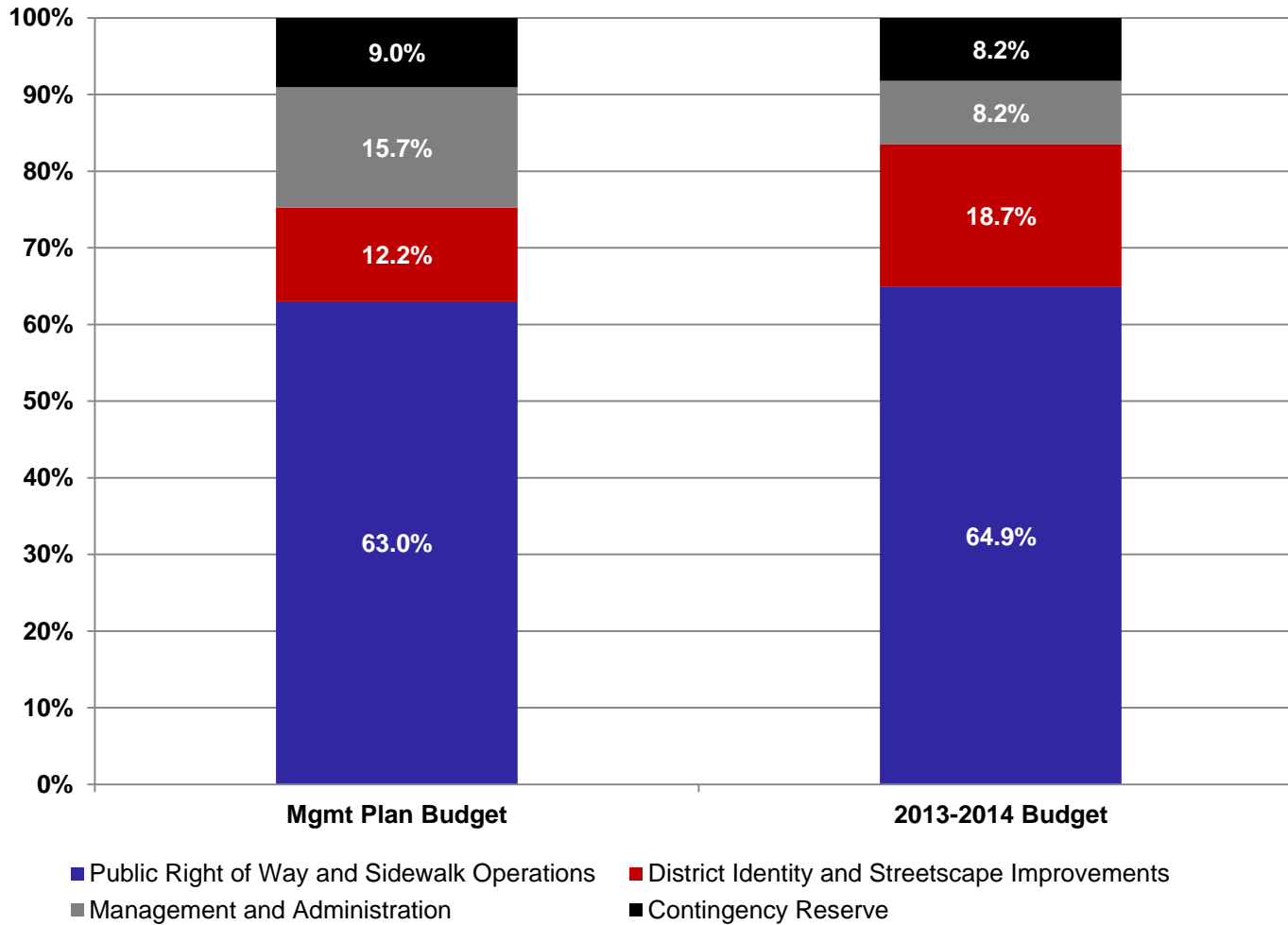
Benchmark 2 – Whether five percent (5%) of the Castro/Upper Market CBD’s actuals came from sources other than assessment revenue.

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

Benchmark 4 - Whether the Castro/Upper Market 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.

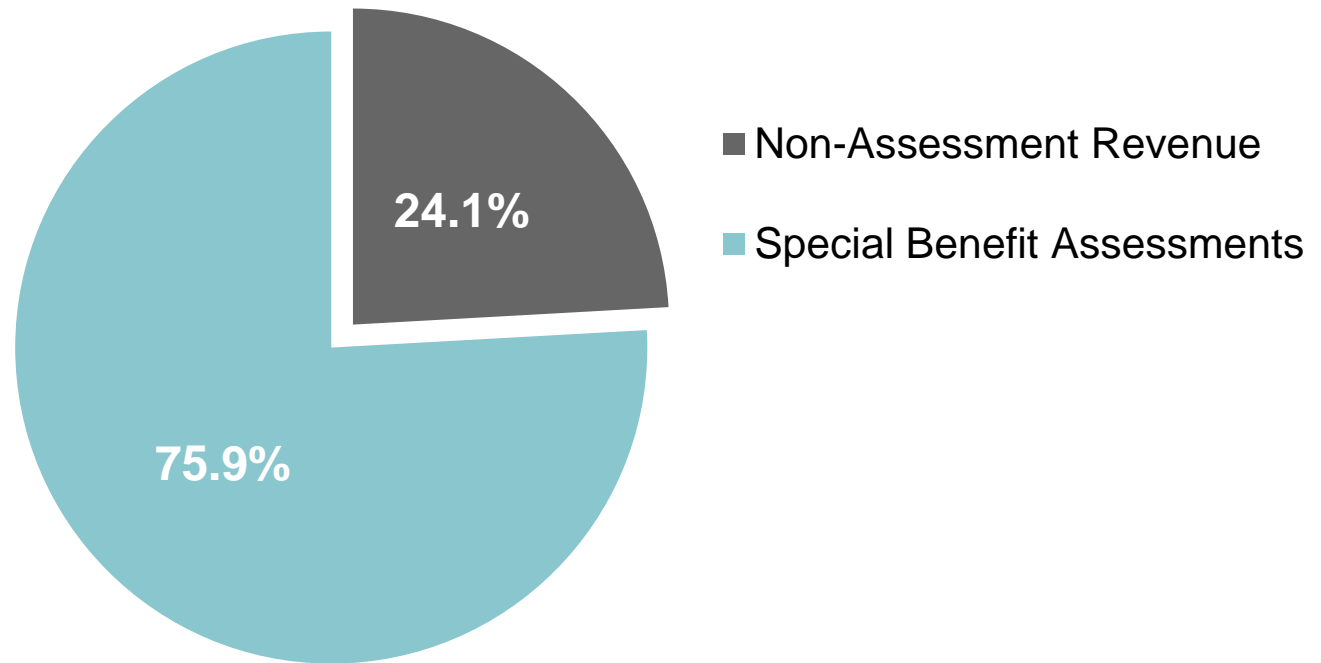


1: Management Plan vs. Annual Budget



2: Assessment Revenue & Other Income

FY 2013 - 2014



3: Budget vs Actuals

Service Category	FY 2013-2014 Variance Percentage Points
Public Rights of Way and Sidewalk Operations plus Public Safety Services	-19.4
District Identity and Street Improvements	+21.5
Administrative/Corporate Operations	+6.0



4: Carryover

Designated Projects	For FY 2014-2015
Unrestricted net assets	
Designated by the board for	
Public Rights of way and sidewalk operations	\$26,827
District identity and Streetscape Improvements	\$4,955
Retail Strategy	\$15,000
Reserves (End of fiscal year balance is ideally 6 months of budget)	\$253,814
Undesignated	
Unrestricted net assets	\$63,895
Total unrestricted net assets	\$364,491
Temporarily restricted net assets	
Restricted for	
OEWD – retail project	\$35,000
OEWD – merchant support	\$5,213
OEWD – retail study	\$32,000
OEWD – LED light improvement	\$15,000
Jane Warner Plaza	\$3,000
Total Temporarily restricted net assets	\$90,213
Total Designated Amount	\$454,704



Recommendations for the Castro/Upper Market CBD

In completing the review of the Castro/Upper Market CBD's annual reports and financials, OEWD sets forth the following recommendations:

- Currently, the CBD only has one staff person. Given the high level of activity of the organization, the CBD should consider hiring additional staff to support the program.
- Fund raising through promotions or other creative means would ensure the CBD continues to meet their non-assessment revenue goal independent of city grants.



Conclusion

The Castro/Upper Market CBD has performed well in implementing the service plan in the district:

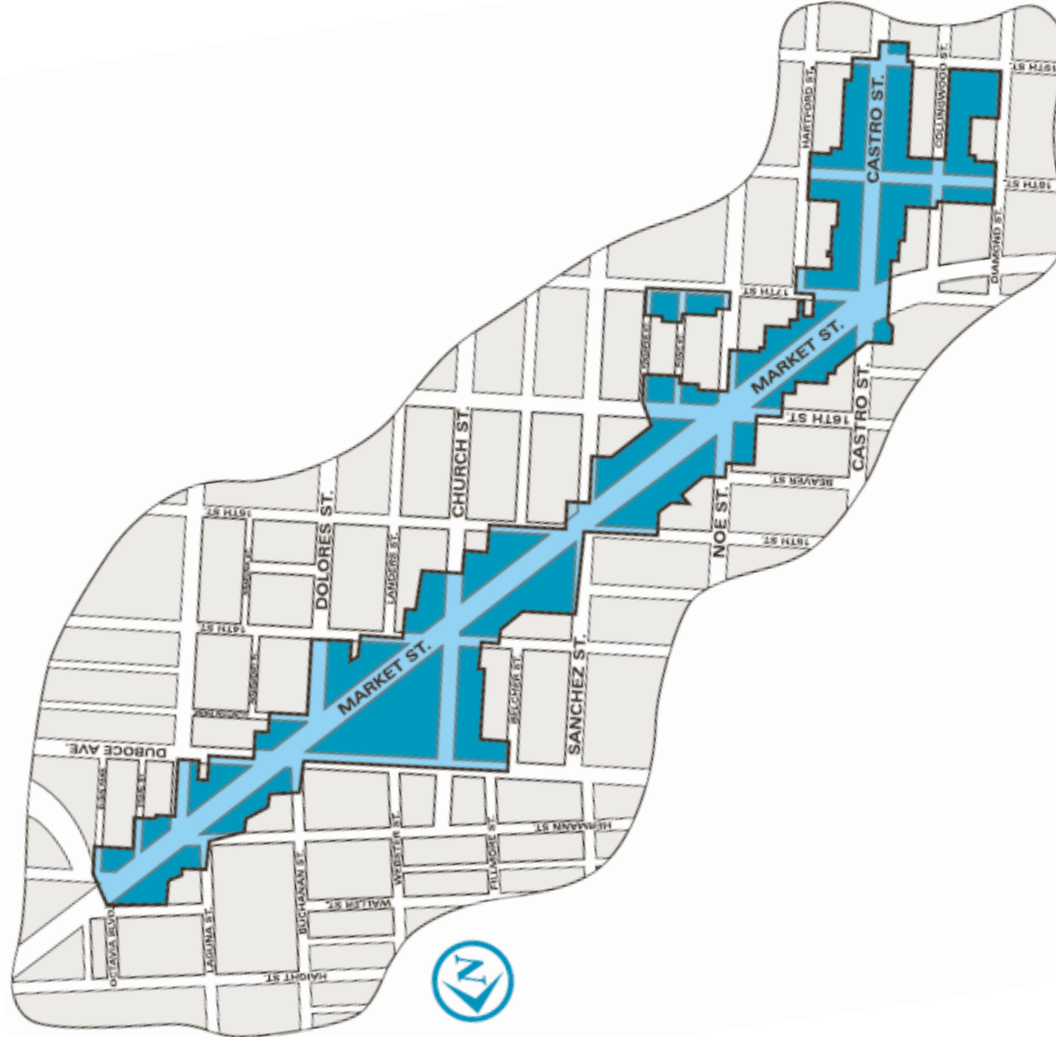
- CBD has continued to successfully market and produce events like *Live! In the Castro* and Harvey Milk Day.
- Increased their opportunities in partnering with community stakeholders and numerous municipal agencies for the implementation of the Castro Street Design Project.
- Maintained an active board of directors and robust subcommittees.



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CASTRO / UPPER MARKET
COMMUNITY BENEFIT DISTRICT

Area Map of the CBD



Active Committees

- Executive Committee
- Finance Committee
- District Identity & Streetscape Committee
- Services Committee
- Land Use Committee

Partner Organizations

- Castro Merchants
- Castro/Eureka Valley Neighborhood Association
- Duboce Triangle Neighborhood Association
- Safeway
- Recology
- DPW

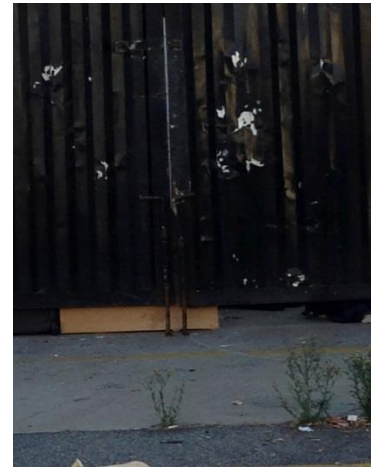
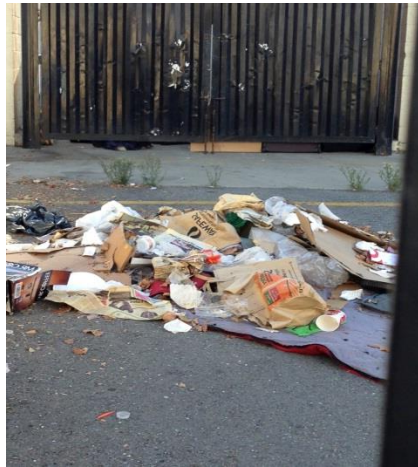
Current Grants

- OEWD Merchant Support Grant
- OEWD LED Celebratory Lights Grant
- OEWD Retail Strategy Grant

Events + Highlights

- ◆ **Clean:** 250 Trash Bags a Month - Clean Team sweeps every parcel daily, removes graffiti and steam cleans quarterly.
- ◆ **Safe:** Collaborates with businesses to fund S.F. Patrol Special Police. Hours of patrol are:
 - ❖ Sunday – Wednesday 4:00 p.m. – 1:00 a.m.
 - ❖ Thursday – Saturday 4:00 p.m. – 3:00 a.m.
- ◆ **Green:**
 - ❖ *Live!* In The Castro: Free outdoor live performances
 - ❖ Castro Ambassadors: Volunteers welcome visitors to the Castro. In four years of operation, the Ambassadors have helped 24,000 visitors. Information is available in seven languages.
 - ❖ Landscaping Improvements and Plaza Management

Before & After Steam Cleaning/Trash Removal



Live! In The Castro



Castro Ambassadors



Challenges

- People living on the street many of whom are seriously mentally ill and/or substance abusers.
 - To address this very serious challenge, the Castro/Upper Market CBD is the lead agency in a unique community-based initiative called Castro Cares.
- Commercial vacancies.
- Dangerous intersections in the district.

Opportunities

- Castro Cares is an opportunity to bring additional, dedicated homeless related and law enforcement services to the district.
- Castro & Upper Market Retail Strategy is the community collaborative effort to address the high vacancy rate in the district.
- Collaborating with MTA and community organizations to improve dangerous intersections.

Projects + Visions

- Improve pedestrian, bicycle, motorcycle and vehicle safety on upper Market St. Work closely with the City to implement improvements.
- Increase the level of homeless related services and law enforcement in the district, either through a continuation of Castro Cares or an increase in City services.

Projects + Visions

- Collaborate with the City to make Jane Warner Plaza a success. This will include making funds available to manage and activate the plaza and to provide enough funding for more cleaning and maintenance.
- Enter the next phase of the Castro & Upper Market Retail Strategy: Implementation of Project Recommendations leading to a decrease in the commercial vacancy rate.

Thank You