



# Noe Valley Community Benefit District FY 2018-2019 Annual Report



# 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 2018-2019

- 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.



# NVCBD Formation

NVCBD	Type	Assessment Budget*	FY 2018-19 Assessment Roll Submission	Year Established	Expires
	Property-Based	\$ 230,138	\$ 269,328	2005	June 30, 2020

*\*budget identified in management plan*



# NVCBD Operations

- **Staff**

- Executive Director – Debra Niemann

- **Service Areas**

- **Public Rights of Way and Sidewalk Operations (PROWSO)**

- This program includes street maintenance, beautification, and safety services.
  - Contracts with Curb Appeal to provide sidewalk cleaning and beautification services.
  - During the holiday seasons, NVA hires San Francisco Patrol Special

- **District Identity and Street Improvements (DISI)**

- This program area is allocated for public space development.
  - Promote the district through a strategic marketing materials.
  - Sponsor special events in the district such as farmer's markets and street festivals.

- **Administration and Corporate Operations**

- Admin 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's staff reviewed the following budget related benchmarks for NVCBD:

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

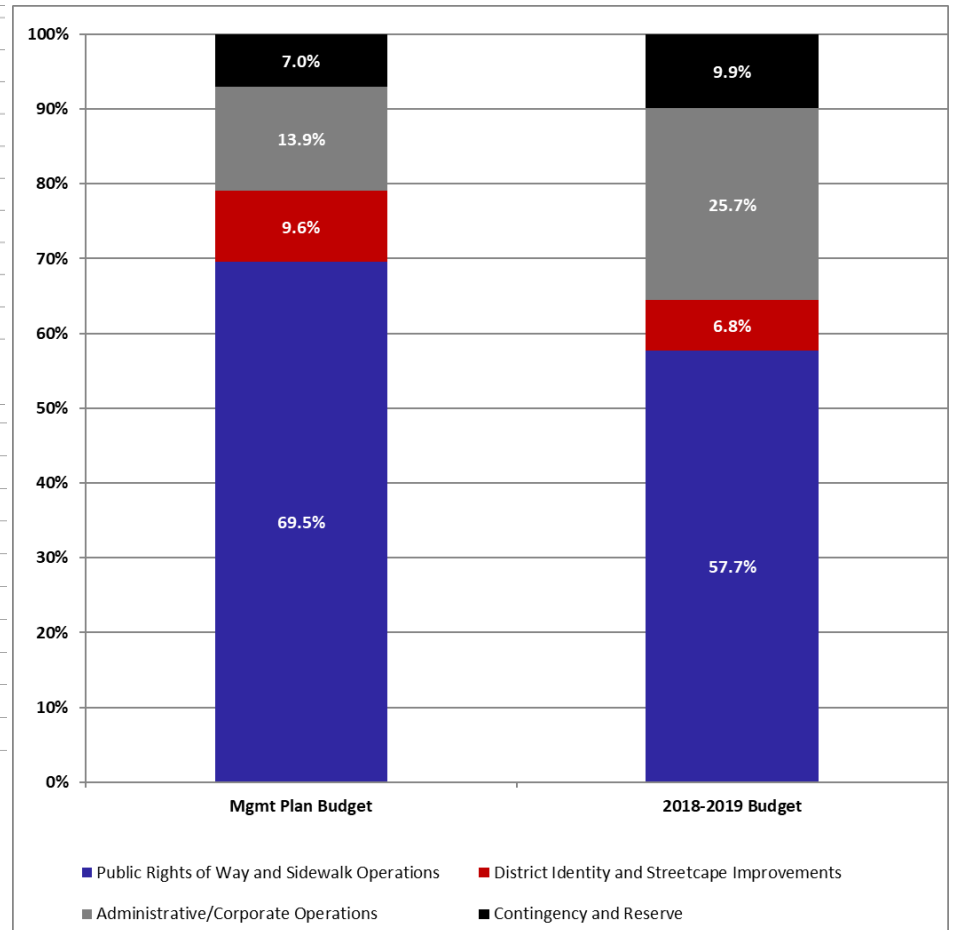
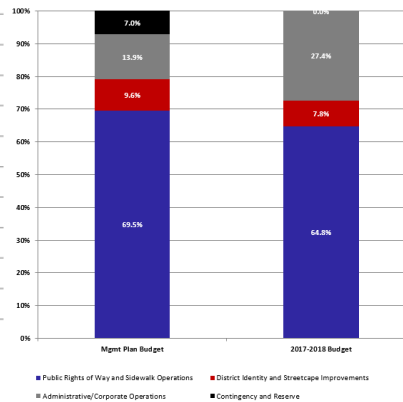
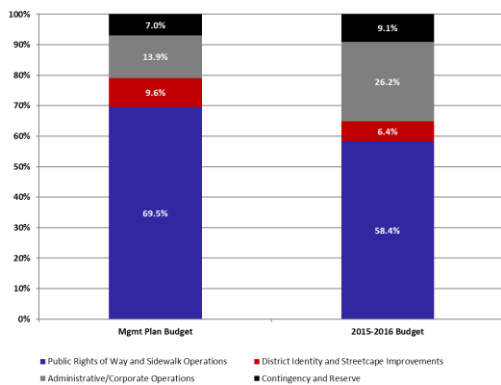
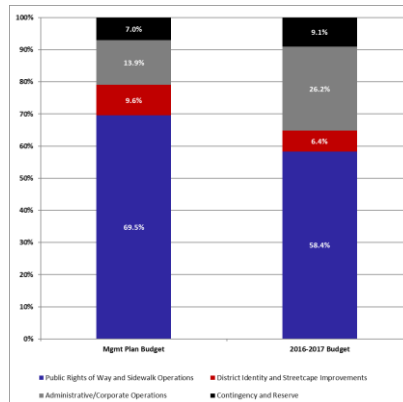
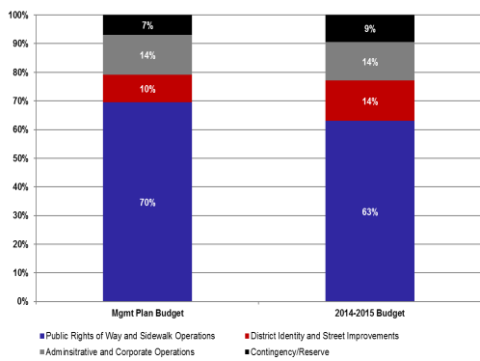
**Benchmark 2 – Whether five percent (5%) of NVCBD's actuals came from sources other than assessment revenue.**

**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

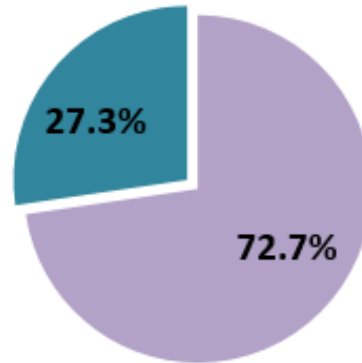


# Assessment Revenue & Other Income



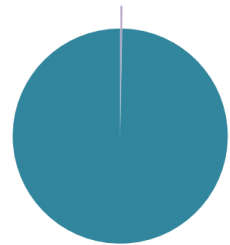
FY 2014 - 2015

- Non-Assessment Revenue 10%
- Special Benefit Assessments 90%



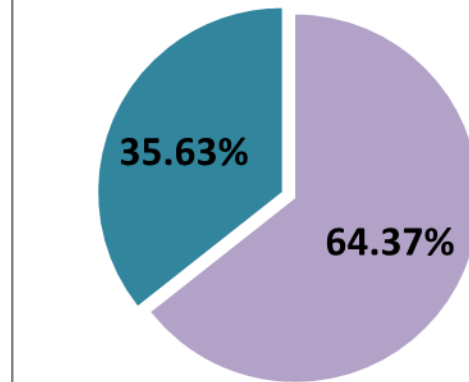
FY 2017 - 2018

- Special Assessment Revenue 72.67%
- Non-Assessment Revenue 27.33%



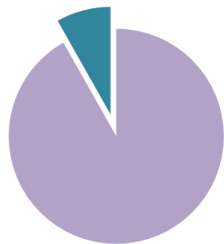
FY 2015 - 2016

- Non-Assessment Revenue .30%
- Special Benefit Assessments 99.70%



FY 2018 - 2019

- Special Assessment Revenue 64.37%
- Non-Assessment Revenue 35.63%



FY 2016 - 2017

- Special Assessment Revenue 91.82%
- Non-Assessment Revenue 8.18%





# Budget vs Actuals

Service Category	FY 2014-15 Variance % Points	FY 2015-16 Variance % Points	FY 2016-17 Variance % Points	FY 2017-18 Variance % Points	FY 2018-19 Variance % Points
Public Rights of Way and Sidewalk Operations	-1%	+6.42%	-5.88%	-5.96%	+0.82%
District Identity and Street Improvements	0%	+0.81%	+9.21%	+0.05%	-0.23%
Administrative Expenses	+4%	+1.38%	+5.73%	0.51%	-0.91%
Contingency/ Reserve	-2%	-8.61%	-9.05%	+6.42%	+0.32%



# Carryover

<b>Designated Projects</b>	<b>FY 2018-2019</b>
<b>Public Rights of Way and Sidewalk Operations</b>	\$114,724.50
<b>District Identity and Streetscape Improvements</b>	\$15,774.00
<b>Administrative/Corporate Operations</b>	\$22,951.50
<b>Contingency</b>	\$11,550.00
<b>Total Designated Amount</b>	<b>\$162,500.00</b>



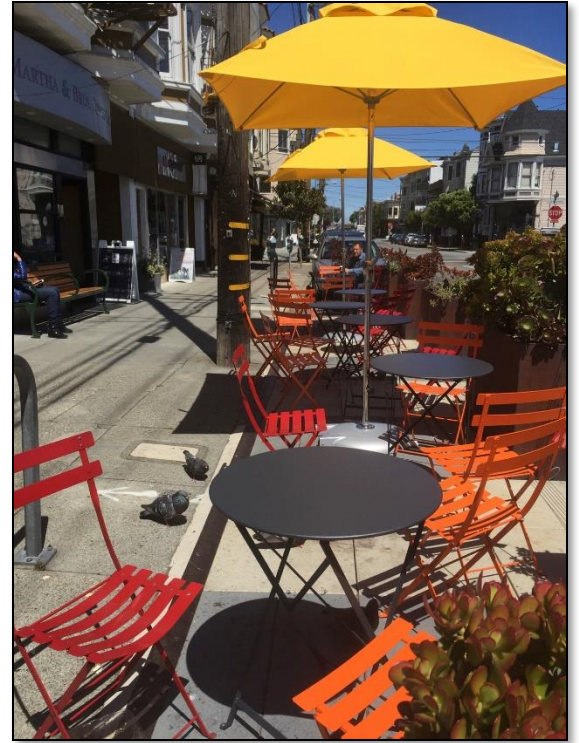
# Findings/Recommendations and Conclusion

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

- CBD will sunset in 2020 and has begun their renewal campaign
- CBD did not meet Benchmark 1 and has historically not met it due to structural weakness in management plan.
- In order to correct this, the CBD needs to decrease the percentage budgeted for Administrative and Corporate Operations by at least 1.79% and increase the percentage budgeted for Public Rights of Way and Sidewalk Operations by the amount deducted from the Administrative and Corporate Operations service area
- OEWD anticipates that upon CBD renewal, the district will be able to fully meet this requirement by updating their management plan appropriately

Although the CBD did not meet one benchmark, it has overall performed well in implementing its service plan. Board is active. CBD has successfully sponsored various events, including the activation of Noe Valley Town Square. OEWD will continually work with the CBD to ensure it meets benchmarks.

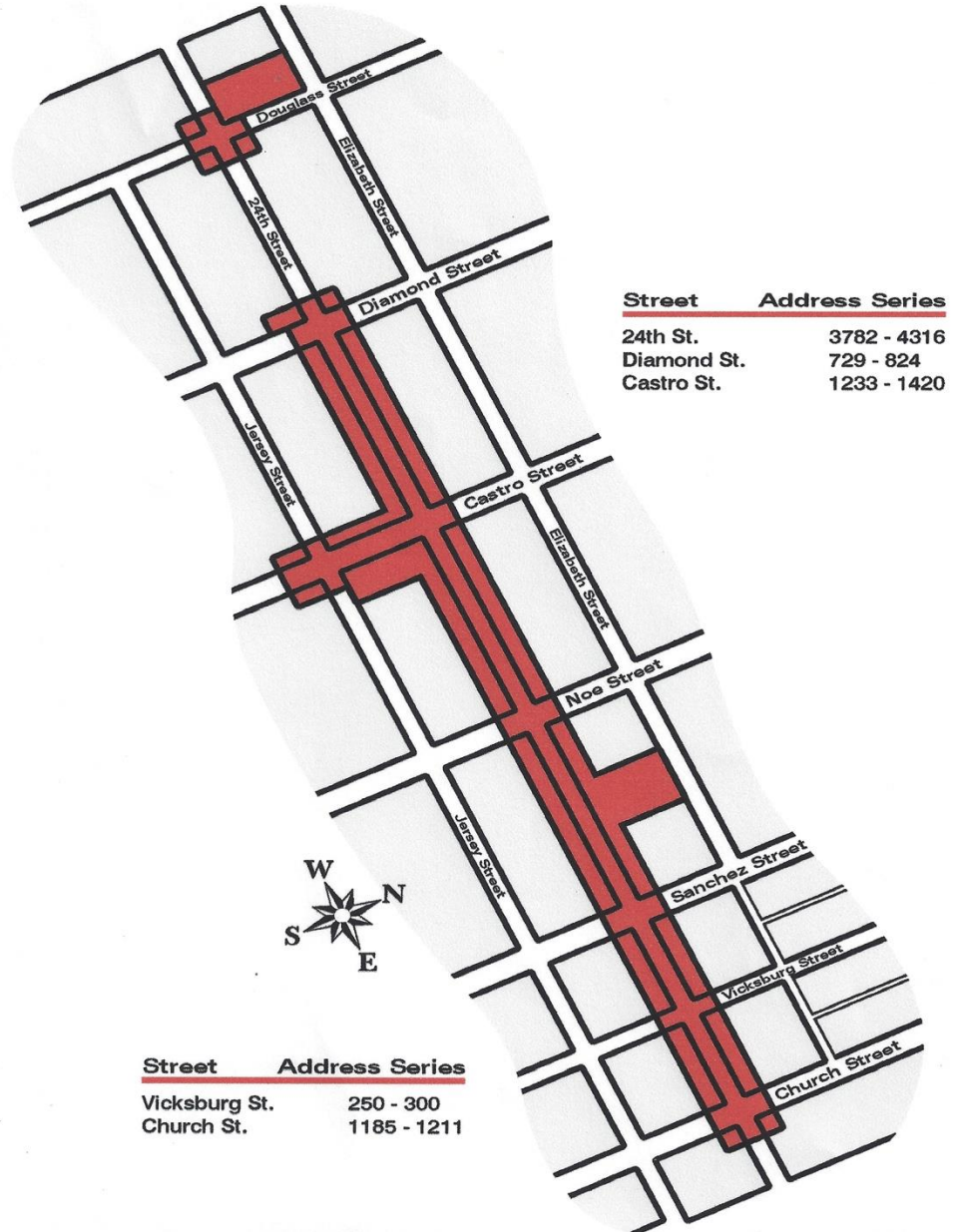




Noe Valley Association  
A Community Benefit District  
[noevalleyassociation.org](http://noevalleyassociation.org)

**Noe Valley Association- A Community Benefits District  
Address Range Map**

# Noe Valley CBD Area Map



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# NVA Active Committees

## Green Committee - Streetscape Improvements



# NVA Active Committees

Community Event Marketing

in partnership with the Noe Valley Merchants & Professionals Association

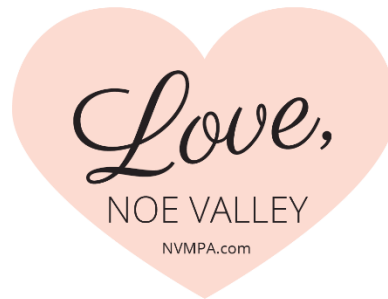


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**live reindeer & Santa December 12**



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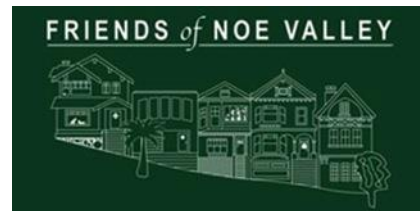


# NVA Partner Organizations



## Noe Valley Merchants & Professionals Association

<http://www.noevalleymerchants.com>

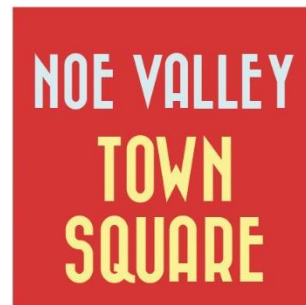


## Friends of Noe Valley

<http://friendsofnoevalley.com>



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## Noe Valley Town Square

<http://noevalleytownsquare.com>

# Grants

2018/19

- OEWD grant for NVTs with NVA to continue to act as fiscal agent for Noe Valley Town Square to ensure success and utilization of new public space.



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# Day to Day Operations

## Current examples:

- Annual removal of 258 bulky trash items
- Annual removal of 176 graffiti marks, stickers
- 10 annual power washings of sidewalks
- 24 flower baskets hung every six months
- 27 Planter boxes replanted every six months
- 7 large sidewalk garden areas maintained monthly
- 229 trees on annual trimming schedule, with tree wells filled with decomposed granite or bark on an as-needed basis
- NVA employs two full-time street porters and a part-time gardener.



# Opportunities

Install a bathroom  
at the Noe Valley Town Square



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# Projects + Visions

- Murals on large blank walls – of private property
- Countdown signals on traffic lights



# Projects + Visions = Advocacy



# Thank You.



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