

File No. 201123

Committee Item No. 3

Board Item No. _____

COMMITTEE/BOARD OF SUPERVISORS

AGENDA PACKET CONTENTS LIST

Committee: Government Audit and Oversight

Date: Dec. 3, 2020

Board of Supervisors Meeting:

Date: _____

Cmte Board

- Motion
- Resolution
- Ordinance
- Legislative Digest
- Budget and Legislative Analyst Report
- Youth Commission Report
- Introduction Form
- Department/Agency Cover Letter and/or Report
- MOU
- Grant Information Form
- Grant Budget
- Subcontract Budget
- Contract/Agreement
- Form 126 – Ethics Commission
- Award Letter
- Application
- Public Correspondence

OTHER

- Civil Grand Jury Report – October 1, 2020
- Civil Grand Jury Press Release – October 1, 2020
- Clerk of the Board Letter – October 7, 2020
- _____
- _____

Prepared by: John Carroll

Date: Nov. 25, 2020

Prepared by: John Carroll

Date: _____



City and County of San Francisco 2019-2020 Civil Grand Jury

Sustain Our City's High Performing Moscone Convention Center

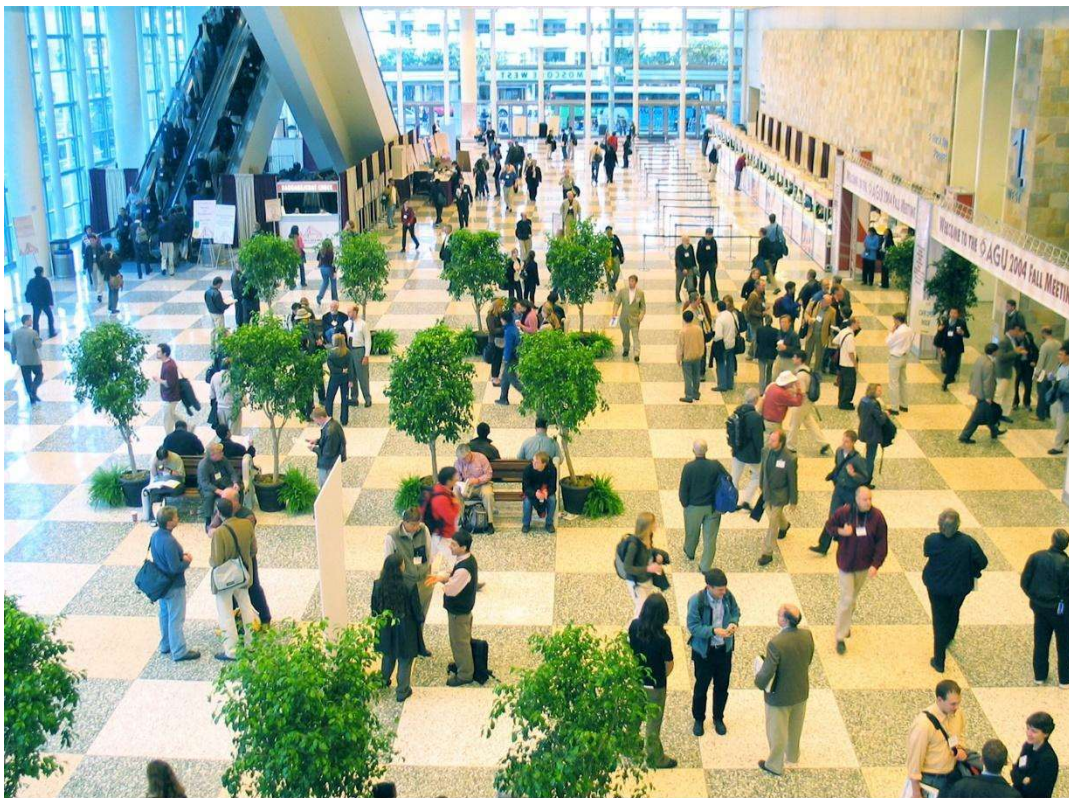


Photo by Naim Ayya

August 2020

The Civil Grand Jury

The Civil Grand Jury is a government oversight panel of volunteers who serve for one year. It makes findings and recommendations resulting from its investigations.

Reports of the Civil Grand Jury do not identify individuals by name. Disclosure of information about individuals interviewed by the jury is prohibited. California Penal Code, section 929

State Law Requirement California Penal Code, section 933.05

Each published report includes a list of those public entities that are required to respond to the Presiding Judge of the Superior Court within 60 to 90 days as specified.

A copy must be sent to the Board of Supervisors. All responses are made available to the public.

For each finding, the response must:

- 1) agree with the finding, or
- 2) disagree with it, wholly or partially, and explain why.

As to each recommendation the responding party must report that:

- 1) the recommendation has been implemented, with a summary explanation; or
- 2) the recommendation has not been implemented but will be within a set timeframe as provided; or
- 3) the recommendation requires further analysis. The officer or agency head must define what additional study is needed. The Grand Jury expects a progress report within six months; or
- 4) the recommendation will not be implemented because it is not warranted or reasonable, with an explanation.

Members of the Civil Grand Jury

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Peter Mills, Parliamentarian

Richard Bogan, Recording Secretary

Phyllis Deets, Correspondence Secretary

Jonathan Gohstand, Technology Secretary

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Rebecca Jordan

Diane Josephs

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SUMMARY

The Moscone Convention Center (“Moscone”) is a City asset of which we should all be proud. It provides many benefits to the City and its residents. At the same time, the convention center and San Francisco face challenges that present risks to sustaining Moscone’s current high performance for the long term.

Moscone’s past success as a convention center is the result of capable individuals at various organizations, with extensive experience in the convention business. The Civil Grand Jury found that these individuals and their organizations (Appendix C) collaborate effectively, are mutually supportive, and deserve credit for Moscone’s success.

With the exception of the impact of COVID-19, Moscone's business has been brisk, robust. San Francisco continues to be a prime destination in the industry. For the near term, assuming continued success selling and retaining future conventions, San Francisco’s convention business looks like it is in good condition, hotel occupancy rates are high and hotel room rates are high.

So, why worry? Here is why. Competition from other cities and the adverse aspects of hosting a convention in San Francisco threaten Moscone’s success. These threats should prompt action to mitigate risks to future convention business.

The potential for adverse trends in future convention bookings and hotel occupancy rates should concern Moscone stakeholders, beyond the shorter-term impacts of the COVID-19 pandemic. (Stakeholders include the city government, Moscone itself, San Francisco Travel, hotels, the tourist sector of our economy, labor, citizens at large, and others.) An economic downturn, competition from other venues across the nation, event sponsor reticence spurred by high San Francisco costs, conventioneer concerns about the cleanliness and safety of our City’s streets - all these jeopardize future Moscone business and associated City revenues.

Moscone continues to benefit from previously contracted conventions and efforts to contract new events, but there have been recent losses like Oracle’s convention that moved to Las Vegas. The reasons for such losses comprise many factors, including street blight, high costs, and visitors’ feelings of insecurity. These three factors are consistently articulated by conventioners and convention planners as reasons to choose other venues. The trends and data presented in this report suggest that absent any actions, losses of San Francisco conventions will grow over time.

At the time of writing this report, San Francisco and the Civil Grand Jury were still in the grip of the COVID-19 pandemic, and the short-term to near-term future is expected to continue to be unclear when this report is published. The reader must realize that the convention business is long-term, and this report presents its findings and recommendations in the light of long-term projections, beyond when the pandemic’s effects subside. The findings in this report are based on research completed prior to the pandemic, but nonetheless important for the long-term future.

BACKGROUND

Many San Francisco citizens are unaware of how important Moscone is to our city, unaware of how attractive a convention center it is, and unaware of the long-term nature of its success and how current risks jeopardize its success in the long term.

However, San Francisco Travel commissioned a poll¹ that found that citizens genuinely agree that tourism is vitally important to San Francisco:

- 93% of residents agree tourism is vital to San Francisco's economy
- 88% feel tourism is important to the City's budget,
- 74% believe tourism makes the City a better place to live,
- 68% believe it is important that their district supervisor support tourism, and
- 66% say tourism serves an important role in paying for City services.

The Civil Grand Jury's interest in exploring Moscone's business prospects was prompted by news stories about how street conditions and high costs make it a challenge to attract and retain conventions. Additionally, jurors' own business experiences suggested that perhaps there were under-recognized risks to Moscone's future success.

It seemed clear to the Civil Grand Jury that warning signs were evident. At the same time, as Moscone and San Francisco have much to offer to attract conventions, competition from other cities and the potential adverse aspects of hosting a convention in San Francisco are palpable challenges.

The Civil Grand Jury's investigation confirmed the warning signs of the potential for future adverse meeting and hotel occupancy trends. An economic downturn, competition from other venues across the nation, event sponsor criticism about high San Francisco costs, conventioners' comments about the cleanliness and safety of our City's streets - all these jeopardize future Moscone business and associated City revenues.

METHODOLOGY

The Civil Grand Jury investigated Moscone, its business practices, how it supports San Francisco's economy and tax revenues, viewpoints of its many stakeholders, and the risks that Moscone faces in the future.

¹ San Francisco Travel Association, San Francisco Resident Survey, 2019, Rev. 6/19, Infographic, page 2

Summarized in this report’s bibliography, the Civil Grand Jury analyzed contractual agreements, marketing strategies, industry and informational documents, financial statements, consultants’ reports, academic reports, survey data, Moscone and San Francisco Travel websites, and more. Many were specific to Moscone, and others provided a broader perspective on San Francisco’s tourism and convention economics and industry-wide information.

The Civil Grand Jury conducted visits to Moscone (during live events and including “back of the house” tours), and interviewed key individuals in the San Francisco government and at several stakeholder organizations.

During Moscone events as well as at select downtimes, jurors observed areas close to Moscone where conventioners often walk. We witnessed what Moscone’s conventioners witness in our streets.

Interviews were conducted with responsible City managers, Moscone management, the travel industry, the hotel industry, and the Yerba Buena Community Benefits District.

DISCUSSION AND ANALYSIS

San Francisco has strong appeal for convention planners and conventioners, and Moscone has a superior reputation in the industry. High hotel occupancy, a busy convention calendar and positive marks on surveys about the Moscone facility attest to this. On the other hand, challenging street conditions and high costs associated with hosting an event in San Francisco detract from Moscone’s overall value as a venue.

Main Challenges for Booking and Retaining Conventions at Moscone

In the highly competitive industry, San Francisco cannot assume that Moscone’s recent past success is a guarantee of future success. The City needs to act now to mitigate the risks that certain competitive disadvantages present today.

The Civil Grand Jury’s review of data and input from Moscone stakeholders foretell a challenge to San Francisco’s future convention business. For example, San Francisco Travel reported that over the course of 2019 thirty-five Moscone future events were lost, where sponsors cited either street conditions or costs (either Moscone costs, hotel costs or both) as top reasons for selecting another city.²

Street Conditions

The blight in some streets near Moscone and key hotels concerns citizens, visitors and businesspeople. According to surveys of convention planners who know multiple convention

² Data provided by San Francisco Travel Association.

venues and compare them with Moscone, approximately half say that San Francisco needs to improve street cleanliness and safety. Most of the rest rank San Francisco as only “average” across these categories. San Francisco citizens also critique our streets: a biennial San Francisco survey³ shows that 74% of survey participants in District 6 that includes the Moscone rank street cleanliness as “grade C” or worse. That is 12% worse than in the prior survey.

Costs

Convention planner surveys and stakeholder inputs show that some competing locations offer venues that allow convention planners to sponsor events at less cost than in San Francisco. The Moscone is not among the most competitive options with respect to a range of costs, including convention center costs, hotel costs, labor costs and others.

Hotel rooms

Aggregate room availability is generally adequate for many conventions that Moscone hosts. However, contracting as few hotels as possible by obtaining adequate room blocks can be challenging, and convention planners often struggle with the lack of relatively large hotels for large San Francisco conventions, leading them to negotiate with dozens of hotels. In other cities like Las Vegas convention planners can accommodate their needs with just one or a few hotels.

Moscone’s Significant Economic Impact

San Francisco’s tourism sector is financially important to San Francisco. Moscone events and visitors are an important driver of the city’s tourism business. In fact, the San Francisco Tourism Improvement District’s Management District Plan states, “The City recognizes the significance of the tourism, leisure and convention industry to the overall economic health of the City⁴.” It also states that the City recognizes the “critical component that the Moscone Convention Center plays with respect to sustaining growth in this area”. It draws over one million attendees and exhibitors per year and is responsible for 21%⁵ of the city’s overall travel and tourism industry.

San Francisco relies on its tourism industry and Moscone’s conventions are a critical driver of the sector. Hotels and visitors generated a total of nearly \$11.8 billion in economic output in the

³ City Performance Team and Corey, Canapary & Galanis, “2019 San Francisco City Survey – A biennial survey of San Francisco residents”, City & County of San Francisco, Office of the Controller, City Services Auditor, 2019, page 20

⁴ New City America, Inc., “San Francisco Tourism Improvement District Management District Plan” as amended, 2014, page 37

⁵ “The City and County of San Francisco Capital Plan, ONESF Building Our Futures, Fiscal Years 2020 – 2029”, page 99

city, while supporting 107,700 jobs and \$5.9 billion in wages and benefits. Chart 1 summarizes some findings from Beacon Economics.⁶

⁶ Beacon Economics, “The Economic Impact of San Francisco Hotels”, Beacon Economics, LLC, Los Angeles, 2019, page 3-4

<p style="text-align: center;">Chart 1 2018 Economic Impact of Hotels and Tourism Including Moscone</p>		
Hotel Spending and Tax Revenues ⁷	Hotel Employment ⁸	Frequency of Conventioneer Spending Outside of Hotels ⁹
<ul style="list-style-type: none"> ● Hotels and visitors generated a total of \$498.4 million in tax revenue throughout the City during this time. ● Spending on hotel operations alone generated over \$4.9 billion in total economic output while supporting over 39,200 jobs and \$2.3 billion in wages and benefits. ● Hotel operating spend (excludes other visitor spend) generated \$441.5 million in tax revenue. ● Hotel visitor spending (not hotel operations spend) generated ~\$57 million additional tax revenue. 	<ul style="list-style-type: none"> ● Around 53% of hotel workers reside in San Francisco. ● On average, hotel workers earn \$50,200 per year, significantly more than in other counties (including Los Angeles and San Diego). ● About 81% of these workers are African American, Asian or Hispanic. 	<ul style="list-style-type: none"> ● Restaurants: 92% ● Shopping: 44% ● Entertainment: 52% ● Stay over post-event: 25% ● Pre-event site-seeing: 19% ● Cultural & education: 17% ● Other (sporting event, family event, etc.): 30%

⁷ Beacon Economics, “The Economic Impact of San Francisco Hotels”, Beacon Economics, LLC, Los Angeles, 2019, pages 3-4
⁸ Beacon Economics, “The Economic Impact of San Francisco Hotels”, Beacon Economics, LLC, Los Angeles, 2019, pages 34-35
⁹ Michael Hughes, “Convention Center & Event Industry Outlook - San Diego Convention Center Corporation BOD”, San Diego Convention Center, March 2014.
<https://www.visitsandiego.com/sites/default/files/Red7MHughes.pdf>, page 6

The overall economic impact of \$4.9 billion, nearly \$0.5 billion of tax revenue, and over 39,000 jobs; these are at risk. The primary risk factors discussed in this report are the cost of hosting a convention in San Francisco and the blight and insecurity visitors see in our streets. San Francisco needs to mitigate these risk factors to protect the economic benefits of the convention business, that in turn provide some of the wherewithal to address the City's various challenges.

Moscone's High Quality Facilities and Operation

As reported by industry expert C.H. Johnson Consulting, San Francisco is a top national and international destination for tourism and conventions, and the Moscone is well managed¹⁰. The Civil Grand Jury's study and analysis confirmed this finding.

As is common in the industry, the City has a contract ("Agreement") with a third-party expert in managing convention centers, ASM Global. The original contract was approved by the Board of Supervisors on 11/06/1990. Today ASM Global manages Moscone pursuant to a Seventh Amendment of the Agreement. The Agreement, as amended, stipulates a term that will end June 30, 2027.

According to C.H. Johnson Consulting, 92%¹¹ of meeting planners and attendees believe the Moscone overall service quality is competitive with other convention centers (55% "same" and 37% "better" or "superior") and 78%¹² rate Moscone staffing, quality and operational processes as "better" or "superior" to other centers that convention planners have used.

Since that 2017 report, and since the Moscone expansion and modernization, convention planners continue to highly rate the facility and its convention services. Stakeholder interviews, client surveys, and consulting reports corroborate clients' esteem of Moscone.

The recently completed (2019) \$500+ million Moscone expansion and modernization project resulted in a larger, more attractive, and more competitive convention center. Moscone's expanded footprint now includes over 700,000 square feet of exhibit space, up to 106 meeting rooms, nearly 123,000 square feet of pre-function lobby space, and has leading-edge facilities and technology. The magnitude and significance of this investment is such that protecting future convention business to compensate the investment is critical.

In the first six months of 2019, 14 ASM Global post-event meeting planner surveys show that 79% of respondents rated Moscone above average or excellent, as did 86% of 7 other surveys in the last six months of 2018. Furthermore, considering eighteen 2019 post-event client surveys

¹⁰ Johnson Consulting, "City and County San Francisco Moscone Convention Center Efficiency Study", Chicago, C.H. Johnson Consulting, Inc., 2017, pages 3 and 34

¹¹ Johnson Consulting, "City and County San Francisco Moscone Convention Center Efficiency Study", Chicago, C.H. Johnson Consulting, Inc., 2017, page 26

¹² Johnson Consulting, "City and County San Francisco Moscone Convention Center Efficiency Study", Chicago, C.H. Johnson Consulting, Inc., 2017, page 27

conducted by the San Francisco Travel Association (San Francisco Travel¹), 82.4% rate San Francisco Travel convention planning services as above average or better.

Moscone Financial Outcomes and Financial Support

Moscone's strategic and financial value to the city is the general spending of conventioners, not Moscone's direct bottom line. City leaders in San Francisco, like their peers in other convention cities, recognize that the convention center itself can be a loss leader, made up with revenues from broader economic impacts including jobs, hotel taxes, other taxes and other indirect economic benefits.

At current levels and aside from debt servicing costs, the direct financial impact of Moscone's operating results are not significant relative to the City's total operating budget. For example, Moscone's FY2019 audited financial statement shows a net operating loss of \$442,128. Such a relatively small loss is sustainable given the broader economic impact of the convention business.

This is consistent with convention center management strategy. While the net result is a loss, and the City constantly strives to improve Moscone's bottom line, the City recognizes that the result in part reflects its operational and marketing strategy. To this end, MED and TID assessments (additional hotel taxes paid by conventioners and other travelers; see glossary) are essential to the successful execution of Moscone's strategic role in supporting San Francisco's tourism business. MED assessments finance sales incentives, partial discounts to gross Moscone rental rates. TID assessments partially fund San Francisco Travel's sales and marketing. Together these assessments are the foundation of San Francisco's convention sales and promotion.

Civil Grand Jury interviews and anecdotal evidence from convention planners indicate that such financial incentives are critical to securing conventions, but that current levels of incentives are not always enough to compete effectively. Moscone leverages MED assessments - approximately \$2.5 million in FY2019 - to discount convention center rental costs, a discount needed to compete with other cities that provide discounts for conventions that they host. (To the same end, the City also contributes incentives of about \$0.25 million in respect of some grandfathered event contracts (from prior to the current approach), and in FY2019 also granted about \$0.1 million in Food & Beverage incentives.

The sum of these three incentives was approximately 21% of gross rental fees in FY2019 (40% in FY2018). They are fundamental to the City's achieving an adequate return on its investment in Moscone.

Industry Competition and Venue Selection - Blight and Insecurity

Not only are financial considerations important in convention planners' decision making, but convention planners consider location factors and how they help attract conventioners. These factors are most important in the case of association conventions, the ones that some

stakeholders describe as Moscone’s “bread and butter”, its “oxygen”. In the long term these association conventions are more at risk than the corporate conventions because the choice to attend a convention is made individual by individual.

Compared with some cities, San Francisco does have certain competitive advantages, but the disadvantage of the uncleanliness in some streets and some individuals’ unsettling behavior on many of our streets and sidewalks offset these. Visitors often express feeling insecure and perturbed, and this offsets our city’s advantages, such as strong airport lift and international routes, cultural, entertainment and touristic opportunities, and the overall appeal of San Francisco’s convention center.

Among 44 San Francisco Travel post-event convention planner surveys¹³ from 2016 to 2019, 81% of respondents said that they would again consider San Francisco for future events, and 19% were undecided or said no. However, there are convention planners who responded yes, they would again consider San Francisco, and then subsequently moved their events to other cities. This suggests that the risk of losing a given event to another city may exceed 19%.

Like San Francisco, other cities invest in and promote their convention facilities and their cities’ competitive advantages – e.g. more convention space, larger hotels, lower costs, less congestion, and higher perceived safety and cleanliness. Based on anecdotal evidence, other cities sell against San Francisco by explaining to convention planners that in their city attendees will not face the insecurity and the blight outside of their convention center and hotels like they do in San Francisco.

San Francisco Travel conducts post-event convention planner surveys along various dimensions relevant to San Francisco as a city. The Civil grand Jury summarizes the results in Chart 2¹⁴ that relate to issues rooted in the city of San Francisco (versus the Moscone convention facility).

¹³ San Francisco Travel Association, “Meeting Planner Survey”, San Francisco, SurveyMonkey data provided by the Association

¹⁴ Ibid.

Chart 2 San Francisco Travel Post-event Meeting Planner Surveys (18 surveys in 2019)			
	Cleanliness	Safety	Hotel Costs
Lowest rating category: “needs improvement”	44%	50%	50%
Combined “needs improvement” and “average” categories	63%	83%	83%

Most of the time the Chart 2 survey participants also made comments that complement their survey responses. Among others, these illustrative comments – and other comments not shown in Chart 3 - demonstrate common safety concerns about San Francisco.

Chart 3 Convention Planner Feedback		
Event Attendees	Year of Event	Convention Planner Comment
10,000 - 20,000	2018	“Attendees noted the number of homeless/mentally ill/drug affected people in the area of the convention. [...] At the same time, others really liked being in San Francisco. Individuals found it expensive.”

10,000 - 20,000	2018	“With high labor costs associated with San Francisco, our expense line increased 30% from the previous year in [...]. Combined with the higher than normal hotel rates [...], it makes San Francisco a very expensive city for our association. This will need to be considered for any future San Francisco meeting.”
> 20,000	2019	“Attendees continue to express concerns about vagrancy (drug abuse on streets), personal safety, and cleanliness of streets. Exhibitors continue to express concerns on vagrancy (drug abuse on streets), personal safety, and cleanliness of streets.”
>20,000	2019	“Many exhibitors expressed concern for the safety of their teams.”
<10,000	2019	“Attendees expressed concern regarding the cleanliness of the city as well as their safety when walking around the city and from hotel to hotel or to offsite events. Increased police presence on city streets would help ease the concern of out-of-town guests.”

Civil Grand Jury interviews with many Moscone stakeholders, our personal observations and other sources highlight additional observations and specific safety concerns:

- Moscone and San Francisco Travel have not developed a custom app for conventioners - to report crimes, bad behavior, etc. - because convention planners prefer that conventioners use their own website or apps for their conventions. Consequently, San Francisco Travel works with convention planners to incorporate relevant information links they want for their conventioners. Large meeting planners especially develop their own apps and incorporate safety related information. Even so, visitors to San Francisco are reluctant to report crimes because they believe they might have to face the cost and hassle of returning to the city to testify at a trial.
- San Francisco Travel provides conventioners with recommended safe paths of travel between Moscone and their hotels.
- Moscone does not have security bollards, whereas other venues do. For example, the Chase Center in San Francisco has them, the Las Vegas Convention Center has them and the Los Angeles Convention Center has them.

- Security is a concern at all convention centers and is another aspect of competition between venues. For example, a recent Los Angeles Convention Center annual report highlighted security enhancements such as additional bike officers, more security training, and handpicked officers who are familiar with convention centers, leading to faster emergency response time.
- Moscone management and San Francisco Travel say there is a need to enhance Moscone's security staffing, including expanding security attendants' scope of duties to include security and greeting/concierge skills and duties that not only make guests feel more welcome, but safer.
- Drug abuse is fundamental to the challenges of insecurity, vagrancy and street conditions that Moscone faces. Indeed, the San Francisco Methamphetamine Task Force report¹⁵ states that impacts of methamphetamines include adverse consequences such as conferences relocating to other cities.
- Moscone's stakeholders uniformly understand that sustainable solutions to the City's street problems require compassion and addressing root causes, and they support solutions aimed at addressing those causes. At the same time, focusing on the immediacy of the street problems for visitors and conventioners, some of the Civil Grand Jury's research suggested that more rigorous enforcement of existing "quality of life laws" could be instrumental in managing street blight and insecurity around Moscone events.
- The police department is a critical foundation of security for conventioners and a positive convention experience. That foundation is supplemented by Moscone attendants, security staff contracted by convention sponsors, and police services and social worker services provided by Yerba Buena CBD. Still, based on convention planner feedback, this is not enough. Conventioners and convention planners demand more.

Industry Competition and Venue Selection – Convention Costs

Convention planners have many cities and convention venues from which to choose. There are on the order of 500 across the United States, and more internationally. The competition to host events is significant, and the cost of hosting a convention is a significant issue for convention planners.

In addition to Moscone convention center costs, convention planners and conventioners are concerned about other costs of hosting events in San Francisco. Some of these costs are outside of the City's direct control, hotel room rates for example, while others are under the City's control, like Transient Occupancy Taxes and other taxes.

San Francisco's Transient Occupancy Tax is currently at a level that implies negligible if any competitive room for increases. Before assessments, the current rate is 14.0%; however, it is

¹⁵ Rafael Mandelman and Grant Colfax, "San Francisco, Methamphetamine Task Force, Final Report 2019", San Francisco, San Francisco Department of Health, 2019, page 1 of Appendix D

16.75% in the hotel zone surrounding Moscone after including TID and MED assessments. This 16.75% rate is the 22nd highest of 150 cities¹⁶. Worse, it exceeds that of all cities most frequently mentioned as competitors for convention bookings. For example, it is 4.25% higher than in San Diego, 1.95% higher than in Washington DC, and 1.25% higher than in Los Angeles and Seattle.

Chart 4¹⁷ displays key criteria cited by convention and event producers for their selection of venues to host events. Civil Grand Jury stakeholder interviews confirm the importance of these criteria. Among the various criteria, cost is a prominent one.

Chart 4 Venue Selection Criteria		
Top Venue Criteria (% Event Producers selecting “very important”)	Top Host City Criteria (% Event Producers selecting “very important”)	Discounts and Other Terms That Event Producers Expect (% of survey participants)
<ul style="list-style-type: none"> ● Event management costs (91%) ● Exhibit hall size and quality (85%) ● Exhibitors and attendee costs (81%) ● Meeting room capacity and quality (79%) ● Exhibit space layout (77%) 	<ul style="list-style-type: none"> ● Hotel room availability (84%) ● Convention center size and quality (82%) ● Hotel room prices and quality (74%) ● Labor costs and service issues (71%) ● Facilities under one roof (70%) 	<ul style="list-style-type: none"> ● Hotel rebates or discounts (82%) ● Exhibit hall discounts (75%) ● Having everything under one roof (73%) ● Other venue or hotel related service discounts/credits (49%)

¹⁶ Thomas Hazinski and Joseph Hansel, “2019 HVS Hotel Lodging Tax Report – USA”, Chicago, HVS Global Hospitality Services, 2019, pages 10 - 13

¹⁷ Michael Hughes, “Convention Center & Event Industry Outlook - San Diego Convention Center Corporation BOD”, San Diego Convention Center, March 2014.
<https://www.visitsandiego.com/sites/default/files/Red7MHughes.pdf>, pages 8 - 10

CSL International quantified how Moscone 2018 rack rates (rates before any discounting) compare to averages across ten competing venues, in some cases using assumptions made to take differing pricing structures into account to facilitate comparisons with other convention centers' pricing structures. (A new, increased Moscone pricing policy with increased rates was approved 11/11/2019 and is in effect from 01/01/2020.) Chart 5¹⁸ summarizes the report's comparison of Moscone's and competitors' rates as follows:

Chart 5 Summary Comparison of Published Rental Rates			
Cost Component	Exhibit Rate Per Net Square Feet	Ballroom Rate Per Gross Square Feet	Meeting Rate Per Gross Square Feet
Moscone	\$0.44	\$0.47	\$0.44
Benchmark/Average	\$0.35	\$0.29	\$0.28
Percent Adverse Gap	25.7%	62.0%	57.1%

The same report¹⁹ summarizes typical discounts for renting convention facilities and notes that Moscone offers discounts of up to 25%. However, it clarifies that such discounts at Moscone are infrequently offered and typically amount to less than \$200,000 per year, versus 7 of 10 competing venues that typically offer larger percentage discounts.

Conclusion

The Civil Grand Jury commends San Francisco's Moscone Convention Center and the multiple organizations and individuals involved in making it successful. Though Moscone sometimes flies under our citizens' radar, it is important for all to know what a valuable and well managed San Francisco asset is the Moscone Convention Center.

¹⁸ CSL International, "Analysis of Convention Industry, Pricing Discounting and Licensing Practices and Policies", New York City, Convention, Sports & Leisure, International LLC, 2018, page 1

¹⁹ CSL International, "Analysis of Convention Industry, Pricing Discounting and Licensing Practices and Policies", New York City, Convention, Sports & Leisure, International LLC, 2018, page 6

Notwithstanding, the Civil Grand Jury also observes the important challenges San Francisco faces to sustain a strong convention business.

Overall, Chart 6 summarizes some of San Francisco’s main strengths, weaknesses, threats and opportunities as a destination for conventions, highlighting both Moscone-specific and city-wide aspects of hosting a convention in San Francisco.

Chart 6 SWOT Analysis	
Strengths	Weaknesses
<p><u>Moscone facility</u>: modern, flexible configurations, column free ballroom, technology, etc.</p> <p><u>San Francisco</u>: strong brand, urban connection, pre- and post-event sightseeing, culture, arts, entertainment, and other attractions</p> <p><u>SFO</u>: international gateway city, ample lift and accessibility</p>	<p><u>High costs</u>: Moscone rents and services, labor, restaurants, hotel rooms, hotel taxes</p> <p><u>Mobility</u>: urban congestion, getting to/from Moscone and hotels</p> <p><u>Visitor perceptions</u>: filth and bad behavior in streets, insecurity</p> <p><u>Hotel sizes</u>: a single large event may need to contract with many hotels</p>
Threats	Opportunities
<p><u>Outside Moscone</u>: failure to improve conditions on the streets</p> <p><u>Costs</u>: inadequate incentives to compete with other venues</p> <p><u>Competition</u>: other cities’ investments in and promotion of their venues</p> <p><u>Hotels</u>: insufficient rooms blocked for large conventions</p> <p><u>Development and Maintenance</u>: insufficient ongoing maintenance or inadequate future capital investments</p>	<p><u>Cost</u>: respond to cost problem with additional event subsidies</p> <p><u>Outside Moscone</u>: respond to problems in area streets with additional sidewalk steam cleanings, more Bigbellies, and more frequent street sweeps and graffiti removal than what Yerba Buena CBD can provide</p> <p><u>Security</u>: increase police presence, install bollards, increase Moscone attendants’ security and service skills</p>

Client post-event surveys and local Moscone stakeholders are clear and compelling in asserting that convention costs and street conditions near Moscone and its supporting hotels demand attention from the City. San Francisco needs to build tomorrow today. San Francisco’s Moscone

Convention Center can have a strong future, if the City appropriately mitigates identified risks, continues investing in Moscone, and continues to skillfully manage its operations.

FINDINGS

Based on the facts set forth above, the Civil Grand Jury highlights here its principal Findings.

Finding #	Findings	Required Responses
1	MED and TID assessments to support convention sales and San Francisco Travel are a key support to Moscone’s competitiveness and success.	<ul style="list-style-type: none"> (i) Mayor (ii) City Administrator (iii) Director of Convention Facilities Department (iv) Director of Office of Economic and Workforce Development (v) Board of Supervisors
2	Currently, strong Moscone and San Francisco value propositions attract corporate and association conventions to the city, underpinning a robust convention business.	<ul style="list-style-type: none"> (i) Mayor (ii) City Administrator (iii) Director of Convention Facilities Department (iv) Board of Supervisors
3	Moscone's primary economic benefit to San Francisco is indirect, deriving from conventions that help fill hotel rooms and support local travel and tourism-related activities.	<ul style="list-style-type: none"> (i) Mayor (ii) Board of Supervisors (iii) Director of Office of Economic and Workforce Development (iv) Controller, Office of the Controller, Office of Economic Analysis Division

<p>4</p>	<p>Moscone’s convention business supports a significant travel and tourism-based workforce that is largely local, vital and diverse.</p>	<ul style="list-style-type: none"> (i) Mayor (ii) Board of Supervisors (iii) Director of Office of Economic and Workforce Development (iv) Controller, Office of the Controller, Office of Economic Analysis Division
<p>5</p>	<p>Economic activity due to Moscone’s conventions is a significant part of the City’s entire tourism sector, about one fifth of it.</p>	<ul style="list-style-type: none"> (i) Mayor (ii) City Administrator (iii) Director of Convention Facilities Department (iv) Board of Supervisors (v) Director of Office of Economic and Workforce Development (vi) Controller, Office of the Controller, Office of Economic Analysis Division
<p>6</p>	<p>Compared to many cities’ competing venues, high local hotel costs, labor costs, and Moscone facility costs make contracting future conventions a significant challenge (notwithstanding current MED and TID assessments).</p>	<ul style="list-style-type: none"> (i) Mayor (ii) City Administrator (iii) Director of Convention Facilities Department (iv) Board of Supervisors

7	Compared to some cities' competing venues, convention planner and conventioneer concerns about insecurity (real and perceived) in San Francisco make contracting and retaining future conventions a significant challenge.	<ul style="list-style-type: none"> (i) Mayor (ii) City Administrator (iii) Director of Convention Facilities Department (iv) Chief of Police (v) Board of Supervisors
8	Unwelcome street behaviors and uncleanliness that bother convention attendees and exhibitors have been important reasons for convention planners of some medium and large size events to select venues in other cities.	<ul style="list-style-type: none"> (i) Mayor (ii) City Administrator (iii) Director of Convention Facilities Department (iv) Chief of Police (v) Board of Supervisors
9	In the face of San Francisco's challenges in the areas of (i) event hosting costs, (ii) street blight and (iii) unwelcome street behavior, increasing Moscone's pricing discounts could at least partly offset these to more effectively attract and retain convention events.	<ul style="list-style-type: none"> (i) Mayor (ii) City Administrator (iii) Director of Convention Facilities Department (iv) Board of Supervisors (v) Controller, Office of the Controller, Office of Economic Analysis Division

RECOMMENDATIONS

Pursuant to the above Findings, the Civil Grand Jury recommends the following actions.

Recommendation #	Recommendation	Associated Findings	Required Responses
1	Renew the current Tourism Improvement District that expires December 31, 2023 to at least maintain then current levels of TID assessments and other terms no less favorable than the current agreement.	F1, F4, F5, F6	(i) Mayor (ii) City Administrator (iii) Director of Convention Facilities Department (iv) Director of Office of Economic and Workforce Development (v) Board of Supervisors
2	Starting with FY 2021/2022 city budget, supplement current MED assessments with an additional general fund allocation of at least \$2,500,000 to provide additional discounts to Moscone gross rental charges, targeting multi-year deals with priority organizations, subject to case by case approval by the City's Director of Convention Facilities.	F3, F4, F5, F6, F9	(i) Mayor (ii) City Administrator (iii) Director of Convention Facilities Department (iv) Director of Office of Economic and Workforce Development (v) Board of Supervisors

3	Effective with conventions taking place after July 1, 2021, the Police Department must assign at least an additional 3 uniformed beat patrol officers per 10,000 expected event attendees, dedicated to patrolling areas extending four or more blocks from any side of Moscone Convention Center during the 8 busiest convention hours overlapping daily start and end times.	F7, F8	(i) Chief of Police (ii) Mayor (iii) Director of Convention Facilities Department (iv) City Administrator (v) Board of Supervisors
4	By June 30, 2021, establish a task force comprised of at least (i) ASM Global, (ii) Community Behavioral Health Services, (iii) Convention Facilities Department, (iv) the San Francisco Hotel Council, (v) San Francisco Police Department, and (vi) San Francisco Travel, to develop a comprehensive strategic plan for event security and street management, to achieve a goal of 25% or fewer “needs improvement” responses in convention post-event surveys for security and street cleanliness.	F7, F8	(i) Chief of Police (ii) Mayor (iii) Director of Convention Facilities Department (iv) City Administrator (v) Board of Supervisors

REQUIRED RESPONSES

Pursuant to Penal code section 933.05, the Civil Grand Jury requests responses as follows:

Required Respondents	Findings	Recommendations
Mayor	F1, F2, F3, F4, F5, F6, F7, F8, F9	R1, R2, R3, R4
Board Of Supervisors	F1, F2, F3, F4, F5, F6, F7, F8, F9	R1, R2, R3, R4
Director of Convention Facilities Department	F1, F2, F5, F6, F7, F8, F9	R1, R2, R3, R4
City Administrator	F1, F2, F5, F6, F7, F8, F9	R1, R2, R3, R4
Controller, Office of the Controller, Office of Economic Analysis Division	F3, F4, F5, F9	None
Director of Office of Economic and Workforce Development	F1, F3, F4, F5	R1, R2
Chief of Police	F7, F8	R3, R4

Appendixes

A. Glossary

ASM Global Company contracted by San Francisco to operate Moscone.

Average Daily Rate (ADR) Hotel room revenue divided by number rooms sold.

Convention Gathering of individuals typically from a common industry or trade.

- Association Convention: event sponsored by a professional association focused on furthering the interests of the industry or a trade group.
- Corporate Convention: event sponsored by a given corporation focused on its business interests.

Convention Planner Individual whose role is to select and negotiate a venue, plan meeting agendas, coordinate event exhibitors, etc. (used interchangeably with “event planner” and “meeting planner”).

Exhibitor Person, organization or contractor responsible for managing the display area a company uses to exhibit products or convey a message.

Occupancy Hotel rooms sold divided by rooms available.

Revenue Per Available Room (RevPAR) Hotel rooms revenue divided by rooms available.

San Francisco Travel Association Destination marketing organization, or convention and visitor bureau, whose goal is to promote the long-term development and marketing of the City.

San Francisco Tourism Improvement District (SFTID) Community Benefit district established in 2008 for the purpose of strengthening the local tourism hotel industry through hotel-specific marketing and promotional activities through San Francisco Travel. The SFTID provides for an assessment of 0.75% or 1.00% (by zone, depending on hotel proximity to the main San Francisco tourism infrastructure) levied on gross hotel room revenue.

San Francisco Moscone Expansion District (SFMED) Community Benefit District established in 2013 for the purpose of financing the recently completed expansion of the Moscone Convention Center and to attract more and larger Conventions The SFMED

provides for an assessment of 0.3125% or 1.25% (by zone, depending on hotel proximity to the main San Francisco tourism infrastructure) levied on gross hotel room revenue.

San Francisco Tourism Improvement District Management Corporation

(SFTIDMC): Non-profit organization that manages SFMED and SFTID. It is governed by a board of industry representatives and oversees the use of funds assessed by SFMED and SFTID to attract conventions and other meeting and leisure visitors to San Francisco.

Transient Occupancy Tax (TOT): 14.0% tax on rental of accommodations for stays of less than 30 days, also known as the hotel tax. It is collected by hotel operators and short-term rental hosts/sites and remitted to the City.

Venue Location of an event (convention center, hotel meeting room, etcetera).

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C. Key Stakeholder Organizations

The following organizations provided input to the Civil Grand Jury’s investigation, interviews and documentation. They are key contributors to Moscone’s success.

- ASM Global
- International Union of Operating Engineers, Stationary Engineers, Local 39
- International Union of Painters and Allied Trades District Council 16
- International Alliance of Theatrical Stage employees and Moving Picture Machine Operators of the United States and Canada Theatrical Employees Union Local B-18
- San Francisco Convention Facilities Department
- San Francisco Hotel Council
- San Francisco Office of Economic and Workforce Development
- San Francisco Travel Association
- SEIU United Service Workers West
- Yerba Buena Community Benefits District



CITY AND COUNTY OF SAN FRANCISCO 2019-2020 CIVIL GRAND JURY

FOR IMMEDIATE RELEASE

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*** PRESS RELEASE ***

Sustain Our City's High Performing Moscone Convention Center

San Francisco, CA, October 1, 2020 – The 2019-2020 Civil Grand Jury (SFCGJ) today released a report focusing on the challenges Moscone Convention Center faces in attracting and retaining clients. The Moscone Convention Center is one of the nation's leading convention venues. It drives about a fifth of the City's approximately \$10 billion travel and tourism sector, generates local jobs, fills hotel rooms and restaurant seats, and generates substantial tax revenue for the City.

The SFCGJ's findings of potential adverse trends in future convention bookings and hotel occupancy rates should concern San Francisco. Principal among the potential longer term adverse trends are conventioners' concerns about the cleanliness and perceived safety of San Francisco's streets, event sponsor reticence spurred by high San Francisco costs, and the difficulty of blocking sufficient hotel rooms in a small number of hotels.

In the near term the COVID-19 fallout continues to wreak havoc on the City's convention business, as it has with hotels, restaurants and other travel and tourism business in general. However, the SFCGJ's report focuses on The Moscone Convention Center's long-term success, having studied challenges present before COVID-19, leading to recommendations to mitigate challenges to Moscone's ongoing success in the years after recovery from COVID-19.

The Superior Court selects 19 San Franciscans to serve year-long terms as Civil Grand Jurors. The Jury has the authority to investigate City and County government by reviewing documents and interviewing public officials and private individuals. At the end of its inquiries, the Jury issues reports of its findings and recommendations. City and County agencies identified in the report must respond to these findings and recommendations. The Board of Supervisors conducts a public hearing on each Civil Grand Jury report.

Civil Grand Jury reports may be viewed online at <http://civilgrandjury.sfgov.org/report.html>.

###

BOARD of SUPERVISORS



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MEMORANDUM

Date: October 7, 2020
To: Honorable Members, Board of Supervisors
From: *ACC* Angela Calvillo, Clerk of the Board
Subject: 2019-2020 CIVIL GRAND JURY REPORTS

On October 1, 2020, the 2019-2020 Civil Grand Jury issued a press release, publicly announcing issuance of three reports, hand delivered to each office on September 29, 2020 (electronic copy attached), entitled:

- **Strengthen our Behavioral Health Services**
- **Sustain Our City's High Performing Moscone Convention Center**
- **A Recycling Reality Check: What Actually Happens to Things We Put in Our Blue Recycling Bins?**

Pursuant to San Francisco Administrative Code, Section 2.10, in coordination with the Government Audit and Oversight (GAO) Committee Chair, the Clerk will schedule public hearings before the GAO Committee within the necessary timeframes to provide the Board sufficient time to review and formally respond to the findings and recommendations.

Pursuant to California Penal Code, Sections 933 and 933.05, the Board must:

1. Respond to the report within 90 days of receipt, or no later than December 30, 2020; and
2. For each finding the Department response shall:
 - agree with the finding; or
 - disagree with the finding, wholly or partially, and explain why.
3. For each recommendation the Department shall report that:
 - the recommendation has been implemented, with a summary of how it was implemented;
 - the recommendation has not been, but will be, implemented in the future, with a timeframe for implementation;
 - the recommendation requires further analysis, with an explanation of the scope of the analysis and timeframe of no more than six months from the date of release; or
 - the recommendation will not be implemented because it is not warranted or reasonable, with an explanation.

Continues on following page

The Budget and Legislative Analyst will prepare three resolutions, outlining the findings and recommendations for GAO's consideration, to be heard at the same time as the hearing on the report. These matters are anticipated to be scheduled for hearing in December 2020.

If you have any questions, please contact John Carroll, Assistant Clerk, at john.carroll@sfgov.org ~ (415) 554 4445.

Attachments: October 1, 2020 Press Release; and
 October 1, 2020 CGJ Reports

jec:vy:ams

c: Honorable Garrett L. Wong, Presiding Judge
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Sally Ma, Mayor's Office
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