

Market Street Arts

A Recovery Plan for the Mid-Market Neighborhood

Developed for the
Mid-Market Business Association
Mid-Market Foundation

By
Urban Place Consulting Group, Inc.

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Executive Summary

Mid-Market is unique, thanks to its **world-class arts and entertainment venues, transit hub, and central location**. In spite of its many positive features, the neighborhood faces staggering retail and office vacancy rates, performance venues lack ancillary businesses, and a recent surge in new residents have found themselves in a neighborhood with scarce amenities..

When Mid-Market faced hard economic times in the decades past, a public-private recovery plan (i.e., the Central Market Strategy of 2011) yielded substantial investment in the neighborhood, including major economic transformations, new housing, refurbished buildings, and revamped streetscapes. Change was palpable through the end of the 2010s, until the COVID-19 pandemic and persistent open-air drug dealing set back Mid-Market's progress.

Market Street Arts is the Mid-Market Business Association & Foundation's (MMBA&F) public-private recovery plan for what the neighborhood urgently needs today. The plan is the result of a multi-year community engagement and data analysis process led by Urban Place Consulting Group, Inc. Findings from this process, including contributions from national experts, determined the recovery plan must capitalize on the creative infrastructure in the Mid-Market corridor, including the five major performance venues and dozens of area arts organizations.

Guided by the vision of Mid-Market as an internationally-recognized arts, culture, and entertainment haven, **Market Street Arts** will invest in attracting diverse artists, art organizations, and creative entrepreneurs to vacant storefronts, support at-risk, long-standing, and new art institutions in the Mid-Market area, and develop a three-year plan to strengthen Mid-Market's reputation.

In the plan's first year, **Market Street Arts** will welcome more than 15 local arts organizations in its five inaugural Creative Hubs, which are MMBA&F-managed and subsidized spaces for creative uses in formerly vacant storefronts. The plan will also launch a public events series, inviting the public to experience live music, murals, and window installations along Market Street. **Market Street Arts** programs are the connective tissue for the neighborhood, creating joyful opportunities for residents and visitors to discover the area's existing and new retailers and cultural organizations. The Creative Hubs and public events programs are on-the-ground actions that will reposition the area's potential.

To succeed, this plan needs sustained political support and public funding, in addition to private funding. The Mid-Market Foundation has been successful in funding this effort, but more investment is needed. Without a resourced strategy for recovery, the neighborhood is certain to face a further decline in ground-floor retail tenants, lose vital arts institutions, and further the negative perception of the area—and San Francisco.

Introduction

Market Street has been a critical driver of economic activity in San Francisco since the American Theatre opened in January 1907 after the earthquake and fire leveled the City. The theater was located in what we know as Mid-Market, at 7th and Market Streets. During that time and in the 115 years that followed, Mid-Market has been a vital part of the City's recovery, and its past success was a critical contributor to San Francisco earning the reputation as "The City that Knows How." San Francisco's future, once again, lies in the success of Market Street.

Market Street Arts is a recovery plan and a set of actions for Mid-Market. The plan capitalizes on the creative infrastructure of San Francisco's historic theater district, which includes buildings and public spaces along Market Street between 5th and Van Ness. The vision driving this plan sees a transformation for the area, one that will shed the neighborhood's current hardships and allow Mid-Market to become a world-renowned arts, culture and entertainment destination and haven, on par with elite international cultural districts such as the Quartier des Spectacles in Montreal.



Patrons awaiting Hamilton at the Orpheum Theatre

How Did We Get Here

The spine of the city and grandest corridor in San Francisco, Market Street is a big, broad way, teeming with life and opportunity. The street intersects numerous neighborhoods, starting at the Embarcadero and terminating in Twin Peaks. The heart of Market Street is Mid-Market—Market Street between 5th and Van Ness Streets—and has long been considered a neighborhood of its own, one with unique challenges and opportunities.

Also known as Central Market, Mid-Market is a nexus linking San Francisco’s smaller, intimate neighborhoods, such as the Castro and the Tenderloin, with Downtown San Francisco. The neighborhood also connects San Francisco with the entire Bay Area through major transit hubs, including Civic Center Station and Powell Street Station.

Mid-Market is home to top arts and cultural organizations, expansive public spaces, thousands of socio-economically diverse residents, multinational corporations, and beloved small businesses. The tides of global economic forces and only-in-San Francisco phenomena all intersect here.

As film came to dominate entertainment work at the turn of the 20th century, Mid-Market saw the opening of vaudeville theaters and cinema venues such as the Warfield Theatre and the Golden Gate Theatre in 1922, as well as the Orpheum Theatre in 1926. These built on adjacent entertainment destinations constructed in San Francisco during this era, including the San Francisco Opera House.

By the mid-century, Market Street’s theater golden age crashed due to a combination of global market volatilities and the innovation of television, which allowed people to enjoy entertainment at home. During this time, the construction of BART tore up major sections of Market Street. This construction lasted about a decade, starting in 1964. Consequently, small businesses shuttered along the corridor.

Mid-Market’s decline was recognized by the City and County of San Francisco as far back as 1962 when SPUR published [What to Do About Market Street](#). As BART construction ceased, Market Street once again became a destination for live performance venues in the 1970s when “...the Warfield, Orpheum, and Golden Gate theaters were given new purpose by music promoter Bill Graham and live theater promoters including Carole Shorenstein Hays.” ([SF Chronicle, 2019](#))



BART construction in 1960s along Market Street

The momentum continued for decades. In 1999 and 2006, respectively, saw the construction of multiplexes, the AMC Metreon 16 and Westfield San Francisco Centre (both a block off Market Street), and investment in the Yerba Buena Gardens and Convention Center. All adjacent to the Mid-Market area, these venues helped to spur a new vision for the area.

These arts & entertainment investments inspired civic action, and in the 2000s, the City and County of San Francisco invested considerable resources and energy into realizing positive changes for the neighborhood at scale. In collaboration with the private sector, the City and County launched two plans for Mid-Market, including the [Central Market Economic Strategy of 2011](#) (which featured the well-known Payroll Tax-Exemption that lured Twitter, Uber, Zendesk, Square, and more) as well as the [Central Market / Tenderloin Strategy of 2015](#). Additionally, the City and County launched [Better Market Street in 2009](#).

These strategies led to significant transformations in the Mid-Market neighborhood, including:

- 21 buildings were refurbished or constructed, major companies took over long-vacant properties (SF Chronicle, 2019)
- Retail vacancies dropped from a rate of 30% down to 20% (OEWD, 2011 and 2014); separate data showed vacancies reduced to 11% in 2017 (CoStar via the San Francisco Department of Real Estate, 2011-2015)
- The number of residents in Mid-Market grew by 33% between 2019 and 2023 due to housing development that was attracted—and made possible—by these strategies (at least 2,315 new units) (Placer, 2022; SF Chronicle, 2019)
- The launch of Better Market Street, a streetscape redesign for Market Street, including a safer and more inviting bike route for cycling commuters
- Ted Egan, Chief Economist for the City and County of San Francisco, stated the profound growth (e.g., 3% increase in retails vs. citywide decline of 1%, \$6 million increase in payroll and gross receipt taxes; \$750,000 increase in sales taxes) in Mid-Market would not have been possible without the City and County's focused economic strategies for the area (SF Chronicle, 2019)

These transformations led to the stabilization and growth of small businesses, attracted corporations to the area, and enabled revolutionary models of support for the arts & entertainment stakeholders in the area. For example, the **American Conservatory Theater (ACT)** rehabilitated the Strand **Theater**, the **Community Arts Stabilization Trust (CAST)** was founded and created opportunities for arts organizations to purchase property (e.g., the Luggage Store Gallery, Counterpulse), and a number of public and private grants were awarded to dozens of arts organizations.

The Challenges Today

In the wake of the pandemic and the drug crisis that has seized downtown cores across all major U.S. cities, Mid-Market became ground-zero for persisting economic and public realm challenges in San Francisco. Despite major transformations made possible by the 2011 and 2015 Strategies, the Mid-Market neighborhood now faces worsening optics, potential loss of long-standing theaters and residents, ever-challenging public spaces, and continuing commercial and office space losses.

With no public strategies in place to revive the area's particular economy and public spaces, the last three years saw Mid-Market's ground floor retail vacancy rate crash to 40%, meaning 40 of the 99 available ground-floor retail spaces are vacant. (Urban Place Consulting Retail Tracking, July 2023). Moreover, recent conversations with area retailers and other commercial tenants have revealed that they are at risk of shutting down operations due to public safety concerns and the ongoing failure to tenant ground floor spaces, which provide consistent foot traffic. This is in addition to the loss of Westfield, Nordstrom, Nordstrom Rack, Old Navy, and the temporarily-closed Whole Foods.

San Francisco's health and reputation run directly through Mid-Market. The negative national and international news coverage of San Francisco largely ignores the recovered and thriving neighborhoods in the city, such as the Outer Sunset, Dogpatch, and other areas that have largely recovered. Instead, the media tends to cite the Mid-Market reality—the loss of tech headquarters, open air drug use in United Nations Plaza, and major closures of long-standing retailers.

Past plans achieved major economic transformations, yielded new residents, and led to improvements to public spaces. Had they been guided by a vision for the area that placed even more emphasis on Mid-Market's arts & entertainment roots, **could the neighborhood have been more resilient to the effects of the pandemic and crippling drug epidemic?**

Mid-Market's Opportunity, the Heart of Our City

Despite the distress Mid-Market faces, the area has enormous potential for a robust economic recovery.

Market Street Arts, our proposed plan for Mid-Market's economic recovery, will focus investment and connect the dots between the area's unique opportunities: top arts & entertainment venues that feature world-famous performers, one of the most highly-trafficked regional transit hubs on the west coast, and grand promenades and public spaces that offer a place for civic gathering and pride. Underpinning these opportunities is the recent history of successful public-private investment in the area.

Additionally, Mid-Market has dozens of arts organizations, brand new boutique hotels, unique restaurants and bars, streetwear brands, skate culture, galleries, murals and other public art installations, a raft of creative small businesses, and thousands of new, market-rate housing units.



Market Street at 7th Street, featuring a view of the Golden Gate Theatre

World Class Arts and Entertainment

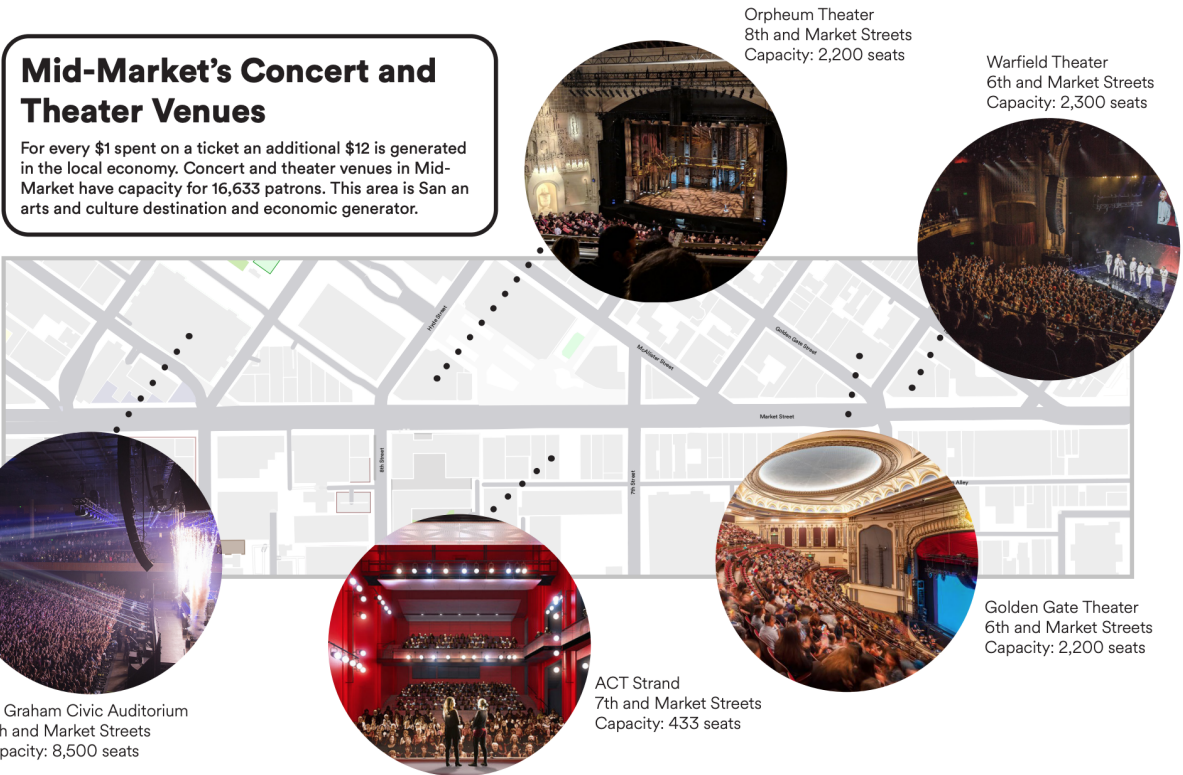
In the span of three city blocks on Market Street, between 6th and 9th, sit five of the City's largest and most respected live performance venues and arts organizations. Four companies run these five venues,

which represent over 16,000 seats and are responsible for the majority of daily visitors to the Mid-Market area on any day of the week that a venue is holding an event.

There is no other place on the West Coast that can claim this diversity of arts and entertainment in such a small, urban area, and that's why the theme of arts & entertainment is the cornerstone of *Market Street Arts*.

Mid-Market's Concert and Theater Venues

For every \$1 spent on a ticket an additional \$12 is generated in the local economy. Concert and theater venues in Mid-Market have capacity for 16,633 patrons. This area is San an arts and culture destination and economic generator.



- Orpheum Theater**
8th and Market Streets
Capacity: 2,200 seats
- Warfield Theater**
6th and Market Streets
Capacity: 2,300 seats
- Bill Graham Civic Auditorium**
9th and Market Streets
Capacity: 8,500 seats
- ACT Strand**
7th and Market Streets
Capacity: 433 seats
- Golden Gate Theater**
6th and Market Streets
Capacity: 2,200 seats

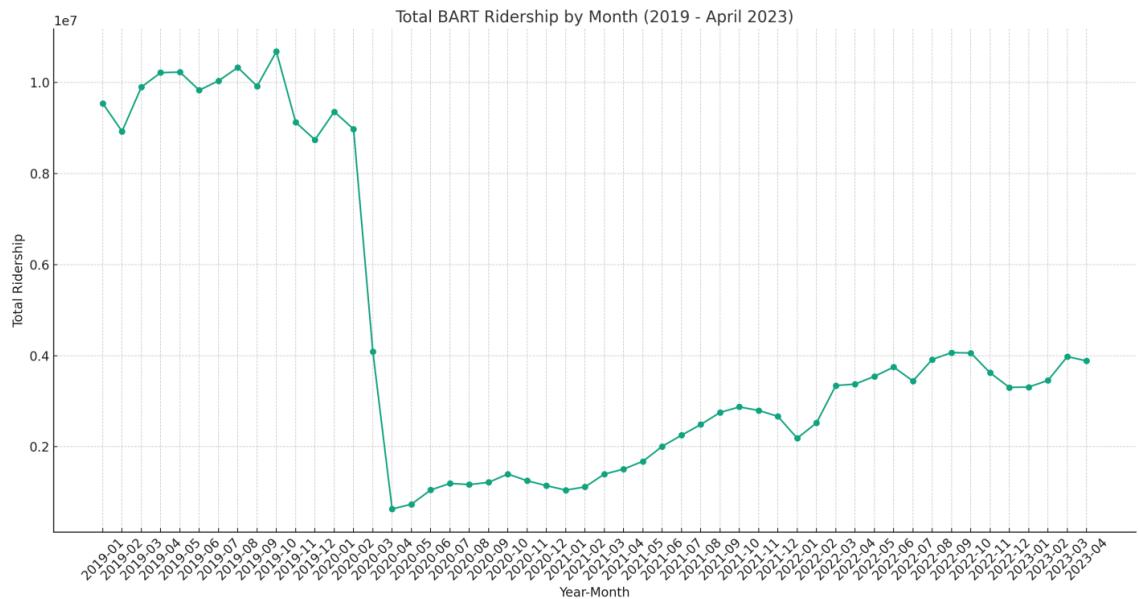
Not to be outdone by the physical beauty of these venues, the companies that operate these entertainment destinations are equally impressive. **Golden Voice**, which runs Coachella and a constellation of venues throughout California, book the **Warfield**, the same venue that opened in 1922 and boasts an artist signature room where you can find the sharpie scribbled tag of The Beastie Boys right next to the John Hancock of the country's 44th President Barack Obama. The **Golden Gate Theater**, which hosted the likes of Madonna and Sting during their last trips through San Francisco, and the **Orpheum**, which had the country's first sitdown run of *Hamilton* outside New York, are both operated by **Ambassador Theatre Group**, an international production company whose North American operation is headquartered in San Francisco. **Another Planet Entertainment**, which runs **Bill Graham Civic Auditorium** along with other iconic SF venues like The Independent and Castro Theatre, and produces Outside Lands, is a direct offshoot from local hero Bill Graham who invented modern concert promotion and trained APE's leadership. And lastly, **The Strand Theater** is run by **American Conservatory Theater**, the largest theater company in the region and a multi-Tony Award winner to boot.

Beyond the big name theaters in the area, arts organizations of all scales have found their way to Mid-Market and laid roots over the last several decades. Organizations such as the Asian Art Museum, **Counterpulse**, **the Luggage Store Gallery**, and **Root Division** complement the energy the major entertainment venues bring to Mid-Market. Together, arts & entertainment destinations, great and small, represent the pillars of culture for the neighborhood and the city and make up a vital ecosystem we must sustain, celebrate, and grow.

Transit Hub and Point of Connection

A destination for San Franciscans, regional visitors, and national and international visitors, Mid-Market has seen a steady return of foot traffic to the area since 2020. However, the public transportation in the area—namely BART—remains underutilized, according to statistics around ridership from the Bay Area Council and BART. In the Mid-Market area, there are two transit stations (Civic Center and Powell) where people can access both BART and MUNI trains. These stations are the most accessed stations after Embarcadero and Montgomery Stations.

BART points to perceptions of safety and cleanliness as contributing factors to low ridership. As of 2023, the monthly ridership on BART is equivalent to 40% of monthly ridership figures from 2019. Other metro areas are seeing rates of return closer to 70-80% compared to 2019 figures.



BART transit data

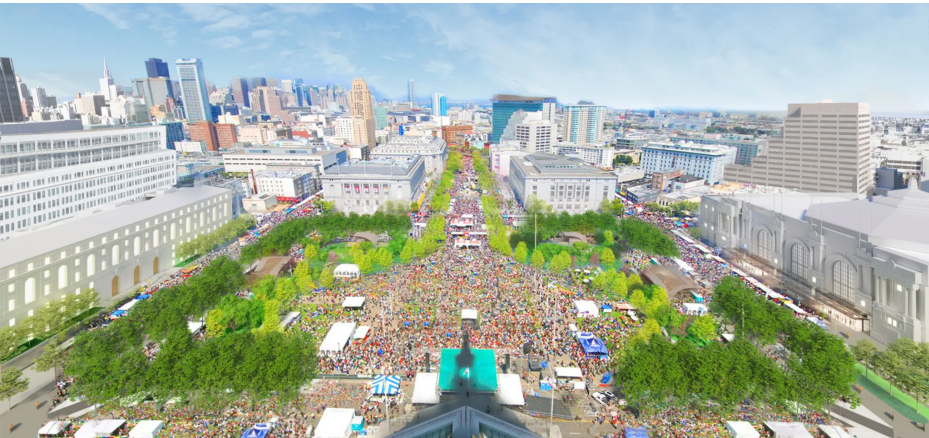
Beyond BART and MUNI trains, this section of Market Street includes the dedicated bike lane, sought-out and historical F-Train, proximity to the Van Ness rapid bus line, and is the corridor for nearly all major bus lines that move throughout the city.

Investment in Mid-Market's economic development will enhance public spaces with positive activations and invigorate publicly-facing ground floor areas. These initiatives and other efforts to infuse the neighborhood with joyful experiences support ongoing safety and cleaning endeavors. As a result, the region's two most significant transportation hubs will become even more welcoming, benefiting arts & entertainment patrons, tourists, San Francisco residents, and those who work and live in the neighborhood.

The Heart of the City

In 2010, when the San Francisco Giants won the franchise's first world championship since leaving New York in the 1950s, the atmosphere around the City was electric. Tens of thousands of fans packed Civic Center to watch Game 5, and when Brian Wilson whipped a fastball past Nelson Cruz to score the final out of the Series, nobody thought the ticker tape parade would be held in the Marina, Excelsior, or Richmond. Two days later, over 1 million packed Market Street to cheer on the champs as they paraded down the City's grand corridor, and piled into Civic Center to toast their hometown heroes.

The place people gather after the annual **San Francisco Pride Parade** concludes is Mid-Market—UN Plaza and Civic Center Plaza host the weekend-long Pride events and programs. Despite being a city with a population of fewer than one million people, San Francisco's Pride Parade remains one of the top-attended pride events nationally, rivaling New York City and Los Angeles.



From the Pride Parade, to the St. Patrick's Day festivities on Market Street, to comedy festivals like ClusterFest and Warriors and World Cup watch parties in Civic Center, **Mid-Market was designed to be, and always will be, the beating Heart of the City.**

A Growing Neighborhood with a Track Record of Strategy Success

Recent history backs up this potential for recovery. While challenges persisted, over the last 20 years, public-private investment in Mid-Market was prompted by focused recovery strategies. The Central Market Economic Strategy of 2011 and Central Market / Tenderloin Strategy are the two efforts credited by developers who were inspired to pursue new hotels, new housing units, and other real estate investments in the area, including refurbishing long-neglected office and retail spaces, transforming them into Class-A spaces that house **Dolby, Twitter, and Ikea**.

Despite shake-ups in the office space sector and retail sector in the area post-2020, Mid-Market continues to gain new residents thanks to the housing development that kicked off because of the strategies in the 2010s. With over 2,000 new residents calling Mid-Market home since 2019—and an additional 2,657 housing units in development as of spring 2023—public-private strategies have turned Mid-Market into a growing neighborhood in a city that has seen a net population decline since 2020. While a number of these new units are market rate housing, Mid-Market and adjacent neighborhoods have long been home to permanently affordable housing options for families, seniors, transient youth, and adults. The affordable housing stock is diverse—SROs, multi-room units—and continues growing under the visionary work of hyper-local and regional affordable housing developers and preservation efforts.

Past strategies brought together area community benefit districts, the Mid-Market Business Association & Foundation, and other area event producers to launch successful public space projects alongside the City of San Francisco, including the Civic Center Initiative, Helen Diller Playgrounds, Market Street Prototyping Festival, and several urban design projects by the Exploratorium. These partnerships were made possible by past strategies and remain in place today, primed for a new approach to drive forward a vision for the area's plazas and sidewalks.

Recovery plans work for Mid-Market and will again because this particular neighborhood needs strategic investment and focus to help it evolve and prevent any further decline.



An excerpt on development projects in the San Francisco Chronicle (2021)

Developing a Recovery Plan

In 2019, **Mid-Market Business Association & Foundation (MMBA&F)** was granted funding from the Office of Economic and Workforce Development (OEWD) to focus on critical Mid-Market public realm and economic efforts. The MMBA&F hired **Urban Place Consulting Group, Inc.** to lead this work, an organization with 30+ years of national experience leading neighborhood strategies and serving community-based organizations. While the initial focus of this work was safety solutions, the MMBA&F knew that safety solutions alone could not solve the challenges this neighborhood endures.

This plan continues safety work while launching essential economic recovery work. Importantly, this plan aligns with the **City and County of San Francisco's Downtown Recovery Plan** and that plan's strategic areas of focus and investment.

Since 2022, as the dust settled from the economic upheaval brought on by the COVID-19 pandemic, the MMBA&F began defining and developing a recovery plan for the neighborhood, working in collaboration with area stakeholders, including businesses, property owners, residents, civic partners, and cultural organizations. This process has been called [Re-Think, Re-Envision, Re-Experience Mid-Market](#) (RRR Mid-Market). RRR Mid-Market was guided by ongoing, robust community engagement and research, including:

- Four public community stakeholder focus groups and gatherings with consistent attendance (i.e., 30+ stakeholders present in person or via Zoom) that involved presentations and discussions around: Arts & entertainment, future of retail, ground-truthing data, and a comprehensive overview of RRR Mid-Market findings
- Dozens of one-on-one meetings with area property owners, businesses, brokers, residents, and nonprofits
- Data collection and analysis
- Consultation from a national retail expert—MJB Consulting—and a national arts and cultural expert—NOW Art
- Call for Creative Concepts

After a year and a half, this process yielded a recovery plan for Mid-Market: **Market Street Arts**. In developing **Market Street Arts**, community engagement, consultants, and research revealed the area's greatest community and economic strength: **Mid-Market is the Bay Area arts and culture destination**. Nearly all businesses in the area—from restaurants to streetwear retailers—rely on the arts, cultural reputation, and regular events in the area for their livelihoods.

Multiple theaters and concert venues in Mid-Market cumulatively have capacity for over 16,000 patrons. They are the primary driver for pedestrian activity in the area and always have been, despite the loss of significant office tenants (Placer, 2023). A national study found that for every \$1 spent on a ticket, an additional \$12 is generated in the local economy (NIVA, 2020), and our research indicates that this impact is felt amongst the diverse retailers in the Mid-Market business community.

With this economic driver in mind, the **Market Street Arts** recovery plan is designed to address the challenges in the neighborhood with near and long-term solutions that support a greater vision for the neighborhood, one that reinforces Mid-Market as the premier arts and cultural destination in the Bay Area, the West Coast, and eventually, the World.



Fans in line for a show at the Warfield

Findings from National Arts & Entertainment and Retail Experts

Urban Place Consulting sought the services of national arts & entertainment experts as well as a retail expert to study, ground truth, and posit solutions for the area’s immediate challenges and opportunities: supporting arts & entertainment and stabilizing the health of ground floor retail.

NOW Art

NOW Art’s consultation identified specific opportunities and methods to engage and support the arts & entertainment community of the Bay Area while activating vacant ground-floor retail spaces and public space.

Key recommendations from NOW Art include the concept of “Creative Hubs,” or a program to make vacant ground floor spaces easily accessible to artists, art organizations, and creative entrepreneurs. Solicited through a “Call for Creative Concepts,” tenants will be organized by “themes,” establishing “Creative Hubs” throughout Mid-Market that can stand-alone as destinations and also play key roles in the existing arts & entertainment ecosystem.

NOW Art determined this approach as the ideal first-step in launching activations in the area because (1) the Creative Hubs can serve as new, exciting destinations for visitors and residents of Mid-Market and (2) reposition ground floor retail spaces in the area, which continue to suffer with tenant retention.

Creative Hubs guide a significant portion of the immediate goals, strategies, tactics, and outcomes outlined in this recovery plan. **At least three Creative Hubs will be implemented by the end of 2023 and throughout 2024.**

MJB Consulting

Throughout winter and spring in 2023, MJB Consulting researched and authored a report detailing an assessment and retail vision for the future of Mid-Market. The report details specific action items to support existing retailers and strategically attract new tenants that align with the area’s strengths: arts & entertainment, culture (e.g., trendy hotels, streetwear sector), and amenities for the new residents to the area.

Specific retail potentials identified include:

- Build on the streetwear destination reputation (e.g., Supreme, Thrasher, BAIT)
- Build on the theater anchors with “proto-hipster” arts & entertainment uses as well as new, complementary food and beverage options
- Convenience goods and services struggle, but stand to adapt to the growing residential presence in the area
- Vacant storefronts stand to cater to the specific needs and preferences of the area’s niche immigrant submarkets

Proposed actions include:

- Support the Initiatives of Existing Merchants
- Facilitate Active Uses
- Restrict Non-Active Uses
- Reconsider Internalized Amenities (e.g., tenant-only gyms)
- Mitigate Impacts of Streetscape Projects
- MMBA&F to Play a Proactive, Leadership Role in Retail Attraction

These findings are reflected in the goals, strategies, tactics, and outcomes of this recovery plan. **The role of funding and political will to enable—or stymie—these findings, which are included in greater detail throughout the goals of this plan.**

Can a Recovery Plan Really Work?

Before explaining **Market Street Arts**, this report must address the question: Can **Market Street Arts**, or any recovery plan, really work for Mid-Market? As has been acknowledged in prior sections, past public-private plans have yielded wins. Can it happen again? The success of this plan hinges on more retail offerings coming to an area with rising ground-floor vacancies due to concerns around the safety of retail staff and security. **Market Street Arts** also wants to deliver new, creative uses in vacant buildings and public spaces. Yet, patrons of existing Mid-Market arts & entertainment venues cite unsafe public space dynamics and negative transit experiences in the area as reasons they avoid frequent visits to their beloved venues in Mid-Market.

As part of this plan and core to the mission of MMBA&F, all efforts to improve safety for Mid-Market will continue, including the continuation of the MMBA&F Community Based Safety Program, launched in 2019 in collaboration with the City and area stakeholders. MMBA&F will also continue advocacy efforts on behalf of the neighborhood to yield transformative action from City and County, State, and Federal agencies with the power to curb open-air drug dealing, a dynamic that results in regular violent confrontations between dealers and a high concentration of open-air drug use of extremely lethal substances by people struggling with addiction in the area's public spaces. If Mid-Market is to become the destination for arts & entertainment in the Bay Area, the real and perceived sense of safety must change. Problematic, illegal dynamics adjacent to storefronts remain undeniably frustrating and overwhelming for all stakeholders in Mid-Market and are the primary reason dozens of Mid-Market businesses' closed up shop in 2023, according to businesses, brokers, and property owners interviewed by MJB Consulting.

This being said, should all energy to help Mid-Market, including staff and monetary investments, solely go towards safety, the soul of Mid-Market will lose hope and fade along the way. For Mid-Market to not only persist but thrive, safety interventions must play out in parallel with economic revitalization. Ground-floor vacancies invite more negative activity into public spaces and disinvestment in the neighborhood. These lead to a loss of pedestrian traffic, sales tax revenue, and deter new businesses from entering the area. Filling them with positive uses as well as the public spaces around them is essential. The five large theaters in Mid-Market cannot be swiftly replaced; they are uniquely designed for major audiences and boast facilities capable of hosting international performers and Broadway shows. These venues are the economic drivers for the area. The real, data-backed reasons people still come to Mid-Market are arts & entertainment venues and large-scale civic events, which is why the plan must deliver solutions to support these venues and build supportive, creative ecosystems around them.

This plan does not present goals or outcomes that will address every problem afflicting Mid-Market, but the plan does present a pragmatic-yet-visionary set of solutions that work with the area's in-place, long-standing strengths. The area's unique infrastructure (e.g., theaters, transit hubs, new housing, and hotels) cannot be easily removed, but they can shutter. Unlike past plans, **Market Street Arts** is designed around starting with what works in Mid-Market, not what could work.

The Recovery Plan: *Market Street Arts*

The Mid-Market Business Association & Foundation officially launched **Market Street Arts** in the summer of 2023. The plan is guided by a clear vision for the area and will be implemented by the MMBA&F in collaboration with private and public sector partners. **Market Street Arts** includes specific goals, strategies to implement these goals, and anticipated outcomes of this work. Importantly, the plan is designed to be iterative and evolve to meet the ever-changing nature of the area. **Market Street Arts** can serve as the natural continuation of past economic strategies, which the City and County led over the last 15 years.

During the RRR Mid-Market process, three critical takeaways surfaced. The plan addresses these through its goals, strategies, tactics, and metrics for success:

Takeaway #1:

Stop the trend of extreme ground floor retail vacancy and attract new, diverse tenants.

Takeaway #2:

Support the at-risk, long-standing, and new art institutions in the area.

Takeaway #3:

Develop a three-year plan to strengthen Mid-Market as an internationally recognized arts, culture, and entertainment haven. A desired destination and point of connection between the Downtown San Francisco neighborhoods and greater San Francisco.

Vision

From performances and art installations to “Creative Hubs” in vacant ground floor spaces and community programs, **Market Street Arts** is creating a critical mass of positive activity and diverse retail uses that layer on top of the existing major arts & entertainment venues (The Big 5 listed above), and highlight smaller, still no less critical organizations like **Alonzo King LINES Ballet, Asian Art Museum of San Francisco, Bindlestiff, Jonathan Carver Moore Gallery, Luggage Store Gallery, CounterPulse, the EXIT Theater, SAFE House for the Arts, Intersection for the Arts**, and more.

Market Street Arts honors the area’s rich history of arts, culture, and commerce with initiatives that invite local artists, entrepreneurs, and organizations to develop creative activations throughout its vacant retail spaces and public spaces. Underpinning these visible outcomes is the work to build alliances between public and private sectors, including departments within the City and County of San Francisco and major investments from larger businesses and developers in the area. **Market Street Arts** will change the reality and the perception of Mid-Market.

Defining Success

This plan was designed to yield near-term and long-term successes for the Mid-Market neighborhood that will address the Mid-Market neighborhood’s ongoing challenges and move the neighborhood towards a future where Mid-Market is the premier destination for arts & entertainment. Each goal consists of specific strategies and tactics as well as a timeline and the envisioned outcome for each tactic.

<p>Goal #1: Capitalize on Mid-Market’s creative infrastructure to realize an internationally recognized arts & entertainment destination.</p>	<p><i>What Success Will Look Like:</i> An increase in day-to-day, hour-by-hour visitors to Mid-Market that patronize arts & entertainment destinations of all scales; new arts destinations in formerly vacant spaces that host Bay Area art organizations and creative businesses.</p>
<p>Goal #2: Foster a thriving, unique commercial corridor.</p>	<p><i>What Success Will Look Like:</i> Ground-floor retail space vacancy that remains at or below 10%, and retail options that are regarded as only-in-San Francisco destinations and cultural touchstones.</p>
<p>Goal #3: Ensure safe experiences in public spaces.</p>	<p><i>What Success Will Look Like:</i> Increased pedestrian traffic, reduction in crime and drug dealing, and an increase in the number of regular, positive programs and events taking place in public space.</p>
<p>Goal #4: Strong neighborhood leadership.</p>	<p><i>What Success Will Look Like:</i> MMBA&F board, staff, and members will have a seat at the table with public and private sector decision makers and serve as the voice of the neighborhood.</p>
<p>Goal #5: Increase investment in the neighborhood.</p>	<p><i>What Success Will Look Like:</i> Robust and stable funding sources for positive and necessary programs to enhance the Mid-Market economy and public spaces.</p>
<p>Goal #6: Change the perception of the neighborhood.</p>	<p><i>What Success Will Look Like:</i> Regular, positive media coverage of Mid-Market.</p>

Goals, Strategies, Tactics, Outcomes, and Timeline

Goal #1: Capitalize on Mid-Market’s creative infrastructure to realize an internationally recognized arts & entertainment destination.

Strategies	Tactics	Outcomes	Timeline to Launch as of Spring 2023		
			First 6 Months	Within 1 Year	Within 2 Years
Bring joyful, dynamic public activations to public spaces	Launch call for concepts to solicit ideas	Dozens of vetted concepts to choose from and implement into joyful, dynamic experiences to public spaces	x		
	Build off and leverage existing partnerships and efforts in the area	Build on momentum in the area	x		
	Identify locations for sidewalk events / programs	Link different areas of activation in ground floor spaces; 30 programs per year	x		
	Continue alley events / programs	Continue past successes and learn from past challenges; 30 programs per year	x		
	Identify vacant or tenanted ground floor spaces for events / programs	Highlight vacant spaces potential and existing businesses; activate at least 3 vacant spaces and at least 3 existing businesses	x		
	Partner with programmers at UN Plaza to continue and launch more public events.	Build on momentum in the area to transform the experience and perception of UN Plaza into a hallmark for joyful experiences in the heart of the city	x		
	Build off and leverage existing partnerships and efforts in the area	Dozens of concepts to choose from and develop into projects	x		
Establish a cluster of Creative "Hubs" in vacant ground floor spaces	Launch call for concepts to solicit ideas	Dozens of vetted concepts to choose from and develop into viable creative ‘businesses’ in ground floor vacancies	x		
	Master lease vacant spaces and provide technical support to enable accessible tenancy.	Minimum of three consistently active "hubs" with dynamic experiences that draw visitors and improve perception and experience.	x		

	Partner Creative Hubs with area arts & entertainment, cultural groups, and other entrepreneurial uses.	Near and clear, sought-out opportunities for specific area artists, organizations, and businesses	x	x	
	Align tenants with specific themes: Literary, Art/Tech, Creative Incubators, Fashion/textile, Makers etc.	Multiple partnerships among arts/culture organizations within and across all hubs increase visitorship and experience with expanded offerings and active storefronts throughout the week, day and night.	x	x	
Support and partner with long-standing arts, entertainment and cultural organizations	Through email and social media, build and maintain relationships through consistent communication and cross-promotion of events.	Regular cross-promotion and partnerships ensure cohesion and maximize reach, drawing new audiences to the area while improving perception	x		

Goal #2: Foster a thriving, unique commercial corridor.

Strategies	Tactics	Outcomes	Timeline to Launch as of Spring 2023		
			First 6 Months	Within 1 Year	Within 2 Years
Support existing, prospective, and new businesses and properties	Promote the area through positive MMBA messaging / information distribution	New customers at small businesses, increased positive perception	x		
	Develop and maintain property owners and area broker partnerships	Increased retail retention and attraction	x		
	Secure city departments points of contact for troubleshooting and advocacy with the City	Reduced stress, cost, and turnaround time for physical improvements	x		
	Pursue and manage funding for retail improvements	Increased investment in the area to improve sidewalk experience and business sustainability	x		
	Provide information about safety solutions and options	Ensure community led safety solutions and stronger support network among merchants	x		
Research and publish information on the retail conditions of the area	Publish and move forward on key actions identified in June 2023 Mid-Market Retail Report by MJB Consulting	Increase in retail retention and tenancy	x		
	Equip civic partners with relevant data and retail report findings	Increase in hyper-local government support aligned with the <i>Market Street Arts</i> vision	x		
Recruit retailers to the area.	Work with Amazon to bring back Whole Foods and Ikea to find additional tenants.	Whole foods returns and Ikea secures additional tenants		x	
	Partner with area brokers to build targeted recruitment strategies.	New "good fit" tenants in the neighborhood		x	
Advocate for policy reform and new policies that remove barriers to entry for prospective commercial and retail uses	Identify new solutions for loading options for businesses impacted by car-free Market Street	New loading areas		x	
	Leverage the recently-passed Downtown Recovery legislation	New retail uses		x	x
	Incentivize office-to-housing conversions and other adaptive land use projects	Increased tenancy of vacant or partially-vacant buildings			x

Goal #3: Ensure safe experiences in public spaces.

Strategies	Tactics	Outcomes	Timeline to Launch as of Spring 2023		
			First 6 Months	Within 1 Year	Within 2 Years
Maintain MMBA-led Safety Program	Partner with Urban Alchemy to deploy services	Street conditions and program quality improves. Positive feedback, including survey responses	x		
	Support businesses, properties, and events as needed	Stakeholders request and receive satisfactory support	x		
	Strategic alignment with other safety programs, public or private	Services are coordinated, resulting in efficiencies. Specific area needs are met	x		
Increase positive activity in public spaces	Design a schedule for MMBA&F-run public activations that covers challenging times of day, specific blocks, etc.	Increase in the number of MMBA&F run events	x		
	Work with business partners to bring their energy out into the sidewalk and plazas through events, outdoor seating, streetscape improvements, etc.	Active and safe sidewalk uses. Sales and foot traffic increase.	x		
Implement physical improvements, including streetscape improvements (e.g., crosswalk design) and lighting	Hire local artist to design and paint crosswalks on Market between 5th and 9th	Amplify pedestrian safety and encourage pedestrian activity			x
Advocate for safety solutions on behalf of Mid-Market stakeholders	Convene community stakeholders to distribute information around safety initiatives for the neighborhood	Active participation from stakeholders	x		
	Lead community voice / consensus around safety	Policy makers respect listen to and seek out MMBA&F to develop and improve safety initiatives for Mid-Market	x		

Goal #4: Strong neighborhood leadership.

Strategies	Tactics	Outcomes	Timeline to Launch as of Spring 2023		
			First 6 Months	Within 1 Year	Within 2 Years
Build and leverage MMBA&F Board members	Recruit high-ranking members from partner organizations	Board seats are full; members are well-informed and engaged	x		
	Task members with responsibilities such as sitting on the Arts Advisory Committee	Members advance the improvement of Mid-Market, regularly share ideas and communicate	x		
Evolve alliance with neighborhood CBDs and other organizations	Partner with the Tenderloin Business Coalition, TLCBD, Mid-Market CBD and other neighborhood organizations around funding and programs	Improved working relationships and alignment around neighborhood improvement goals and strategies	x		
Maintain authentic relationships with community stakeholders - businesses, residents, property owners, etc.	Maintain active touchpoints (email, meeting, face to face meet and greet), work with, listen to and support stakeholders	Increased membership base	x		
Serve as the point of contact and community leader in advocacy with government actors in the neighborhood	Regularly communicate with city officials and convey stakeholder needs and solutions.	Regular meetings with policy makers and adoption of MMBA&F proposed solutions	x		
Build MMBA&F staff to implement and sustain the work	Hire talented and committed people who understand the neighborhood	MMBA&F has an enjoyable workplace and employees have a manageable workload	x		

Goal #5: Increase investment in the neighborhood.

Strategies	Tactics	Outcomes	Timeline to Launch as of Spring 2023		
			First 6 Months	Within 1 Year	Within 2 Years
Pursue and manage government funds for area efforts	Apply for public grants for all program areas on an ongoing basis	Increased grant funding	x		
	Grantee management (as grantee)	Deliverables met in a timely manner within budget	x		
	Subgrantee management	Subgrantee meets deliverables in a timely manner within budget	x		
	Submit requests for one-off and ongoing investment from the City, State and Federal government	Investments meet the needs of the area	x		
Pursue and manage private funds for area efforts	Pursue private foundation and corporate investment, one-off or ongoing	Increased ongoing and one-off investments via grants, donations, and other area investments		x	
	Lead MMBA members to aligned, strategic neighborhood investment	Increased and aligned investment by local developers, properties, and businesses		x	

Goal #6: Change the perception of the neighborhood.

Strategies	Tactics	Outcomes	Timeline - Launching Spring 2023		
			First 6 Months	Within 1 Year	Within 2 Years
Proactively and reactively manage media coverage of the neighborhood.	Hire a publicist and build out a messaging toolkit	Messaging and toolkit is created and readily adapted by media and other influencers, increase in positive press	x		
Express a clear vision for the future of the neighborhood	Create outreach materials and promote the vision	People can clearly explain and participate in <i>Market Street Arts</i>	x		
Document neighborhood success stories	Hire video crew and photographers for openings, events, activations and festivals	Photography and video of events is shared on socials and other media	x		

Implementing *Market Street Arts*

While many other neighborhoods are experiencing a ‘comeback’, the local, national, and international reputation of San Francisco comes through the heart of the city. This plan fosters civic pride, once again showing the world San Francisco’s know how.

The current investment and comprehensive budget detailed below reflects multiple types of contributions to **Market Street Arts: monetary and in-kind investments**. The dollar amount is the best attempt to quantify the value of both real and anticipated funding as well as in-kind investments, which include but are not limited to the reduction or waiving of rent for retail spaces, tenant improvements or other physical improvements, pro bono services, and so on.

Current Investment

To date, area businesses and the City and County of San Francisco have provided funding to the Mid-Market Foundation to develop and implement components of the **Market Street Arts** recovery plan.

This investment represents a portion of the comprehensive budget in the next section and includes the support required to launch and complete a number of our goals’ strategies, including the creation of **at least four creative hubs that will last one to two years, one season of public events, staff support for MMBA&F, and a new approach for telling the story of Mid-Market.**

The Mid-Market Foundation is committed to further fundraising for these efforts, but **greater investment is needed from both the public and private sectors in order to fully realize the vision and goals of the plan.** Funding for **Market Street Arts** must come from two sources: public agencies and private partners. As a public-private partnership, **Market Street Arts** can rely on shared interest, diversity of investment, and multiple partners. This will ensure long-term viability no matter the economic hurdles (or opportunities) ahead.

Importantly, this recovery plan and goals have been launched and will forge ahead with whatever funding can be secured. Greater, comprehensive investment will allow near term successes and transformations to grow and be sustained.

The comprehensive budget outlined in the next section reflects the greatest potential for investment in addition to the investments secured as of August 2023.

Comprehensive Budget

In order to realize the grand vision of Mid-Market as an international, thriving arts and entertainment destination, robust and ongoing investment is essential.

The same takeaways that guided the goals, strategies, and anticipated outcomes of the **Market Street Arts** recovery plan align with the investment opportunity this plan asks the City and County of San Francisco and the private sector to support **in addition to investments made as of August 2023**.

These investment opportunities, listed in detail below, present (1) funding or in-kind investments and (2) ongoing efforts that would support this funding. Additionally, these opportunities align with the structure of the *Mayor's Downtown Recovery Plan*, the Office of Small Business, and the Community Economic Development teams.

Two-Year Budget Recommendation for Market Street Arts:

- \$8 million for Year One (FY 2023-2024)
- \$7 million for Year Two (FY 2024-2025)

Investment Opportunity #1:

Stop the trend of extreme ground floor retail vacancy and attract new, diverse tenants.

Proposed Funding Support: \$5.25 million year one, \$4.25 million year two.

Alignment with Mayor's Downtown Recovery Plan, Strategies 2, 4, and 9

Making it easy and appealing to operate a business in Mid-Market is essential for attracting new tenants and keeping existing businesses—which includes art & culture venues as well as nonprofits—to this area. There are many adjacent areas and options that simply do not possess the same range and type of challenges found in Mid-Market.

- **Two year program to attract new and retain existing tenants.**
\$3 million the first year and \$2 million the second year to create and operate a hyperlocal, nimble, and easily accessible “Mid-Market Tenant Support Program” for Mid-Market ground-floor businesses (Note: “businesses” includes nonprofits and arts & entertainment and other cultural organizations), which will include:
 - Project management/support through permit and construction
 - Tenant Improvement cost allowance

- Design and Engineering cost allowance
 - Building Permit cost reductions
 - Aid solutions for businesses needed to adapt to car-free Market Street, including but not limited to new pick-up and drop-off challenges as well as loading and unloading
- **Incentivize and sustain new tenants.**
 \$2 million / year (two year) commitment to support new businesses in their first years of tenancy in Mid-Market program, which may include:
 - Rent subsidies
 - Property and sales-tax rebates for first 1-2 years in business
 - Permitting costs, including liquor licenses
 - Encroachment Permit cost reduction
- **Reposition the retail potential of Mid-Market.**
 \$250,000 / year (two year) commitment to provide direct assistance to the ongoing efforts of area brokers and government agencies to attract tenants and fill vacancies.
 - Develop and implement recruitment strategy for the area based on the 2023 Retail Market Condition report published by Mid-Market Business Association & Foundation (partially funded by the OEWD RFP 224 grant).
 - Develop and produce retail leasing collateral and events in partnership with area brokers.

Investment Opportunity #2:

Support the at-risk, long-standing, and new art institutions in the area—the anchors for the future Downtown San Francisco Arts, Culture and Entertainment (ACE) Zone.

Proposed Funding Support: \$1.75 million / year

Alignment with Mayor’s Downtown Recovery Plan, Strategies 1, 2, 6, and 7

Mid-Market is home to the largest off-Broadway theaters in the San Francisco Bay Area—the Orpheum, the Golden Gate Theater, two of the largest music venues—the Warfield and adjacent Bill Graham Civic Auditorium, and dozens of other, active cultural institutions (e.g., ACT Strand, the Luggage Store, Counterpulse and adjacent Asian Art Museum). This is the ideal area to launch the ACE Zone efforts as part of the Downtown Recovery Plan.

These institutions need a vibrant neighborhood ecosystem of businesses to serve their patrons, and area businesses stand to modify their operations to leverage the pedestrian volume from performances and

art shows.

- **Ensure the areas around venues are clean, safe, and welcoming.**
Continue funding MMBA&F's Community Based Safety Program, dedicating funding from that program to a "Roving Clean and Safe ACE Team," including increased power washing and ambassador staffing for large performances in Mid-Market.
- **Incentivize businesses to operate in the evening.**
\$1 million / year to subsidize permits and/or nighttime operations for ancillary businesses (e.g., food and drink) to ensure vibrant neighborhood-wide evening activities and options for art & cultural venue patrons.
- **Create new, positive experiences in our public spaces.**
\$750,000 / year supporting art programming and other passive and active experiences along Market Street and adjacent alleys to ensure an overall positive, joyful experience for arts & cultural venue patrons.

Investment Opportunity #3:

Develop a three-year plan to strengthen Mid-Market as an internationally recognized arts, culture and entertainment haven. Utilizing its point of connection between the Downtown San Francisco neighborhoods and greater San Francisco to build it as a desired destination

Proposed Funding Support: \$1,000,000

- **Build and maintain a public-private program for Mid-Market.**
\$1,000,000 / year in grant funding to continue the development and evolution of a hyper-local economic strategy for Mid-Market.

Political Will

As of 2023, the City and County has two neighborhood economic strategies in place that relate to Mid-Market, however, they sit adjacent or only partially consider the neighborhood. They do not focus on Mid-Market nor publicly recognize the importance of Mid-Market.

- The Tenderloin Community Action Plan - Similar to Mid-Market, the Tenderloin has unique challenges and deserves such a focused and well-supported strategy.
- The Mayor’s Downtown Recovery Plan - a bold and ambitious initiative, yet all neighborhoods served by the Plan do not possess the same level of challenges as Mid-Market.

In order for Mid-Market to realize economic recovery, the City and County must embrace the vision and implementation plan presented in this document. The City and County must provide strategic funding and support for *Market Street Arts* that aligns with the Mayor’s Downtown Recovery Plan and the Tenderloin Community Action Plan.

Beyond City and County support lies the need for state and federal agency alignment. Considering the Spring 2023 decisions by the State of California to bolster the presence of law enforcement in the Mid-Market/Tenderloin area and ongoing efforts to fund or study the future of economic development in Downtown cores by the State and federal agencies, alignment at all levels of government with private sector actions is vital to the future health of this neighborhood.

Adopting *Market Street Arts* at every level of government will attract private investment and create a designated avenue for public sector investment.

Alignment with City and County Goals

A great deal of the funding and support (e.g., staffing, policies, etc.) secured and still needed stands to not only align with existing plans, but may also align with other existing services and functions of the City and County.

For example, the Mid-Market Retail Report prepared by MJB Consulting as part of this plan, which was delivered to the MMBA&F in the spring of 2023, proposed a number of policy changes to allow increased ease and access for retail in the neighborhood. In June 2023, Mayor London Breed and Supervisors Matt Dorsey, Joel Engardio, and Myrna Melgar introduced legislation to facilitate easier permitting for small businesses, encourage economic recovery and growth, and fill commercial vacancies in San Francisco.

Should this legislation be approved by the Planning Commission and enacted, several of the key areas of action identified in the Mid-Market Retail report will be realized, proving our shared goals and alignment, including:

- Allow more business uses on the ground floor
- Lift restrictions on bars and restaurants
- Incorporate new liquor license for music venues
- Ease legalization process for existing outdoor patios

- Remove certain public notice requirements
- Enable priority processing for nighttime entertainment, bars, and restaurants

Additionally, the legislation stands to ease code adjustment requirements for office-to-housing conversions, which may make all the difference for certain prospective projects in Mid-Market.

What Happens if We Do Nothing?

Prior to the pandemic, in 2019, challenges persisted in the Mid-Market. And yet, those challenges pale in comparison to how Mid-Market would have fared in the 2010's without focused, resourced government—and private sector—investment. The 13+ commercial buildings that were renovated would likely still be sitting shuttered. The confidence banks and private equity had to invest in new buildings—especially new housing—in this area simply would not have occurred without a City and County-backed strategy for this stretch of Market Street. And the vacancy rate, which sat at 30% in 2011, would not have been reduced by two-thirds by 2017.

These successes from the 2010s will be leveraged so long as the City and County of San Francisco and private stakeholders invest in the **Market Street Arts** vision and implementation plan. These investments will sustain the past wins—a direct result of City and County support—and ensure that the area does not fail in a moment of natural energy and opportunity.

Should there be no investment in this recovery plan—moreover, no investment to realize this recovery plan—Mid-Market will suffer and nosedive. The neighborhood stands a chance if we act today. Action must occur this year. All that is required now is a commitment from the City and County and members of the Mid-Market (and Bay Area's) private sector. We only need to look at recent history to see what progress is possible.

Committing to the neighborhood with a plan rooted in the area's history while building a vision brimming with arts and entertainment is the necessary bold vision that can transform Mid-Market into San Francisco's internationally recognized cultural destination.

About Mid-Market Business Association & Foundation (MMBA&F)

The Mid Market Business Association (MMBA) is a 501c6 that advocates on behalf of businesses, property owners, and other stakeholders along Market Street between 5th and Van Ness and surrounding areas. The Mid Market Foundation (MMF) is a 501c3 nonprofit established in 2020 that accepts charitable donations and seeks funding to conceive, implement, and manage transformative programs. The Mid-Market Business Association & Foundation has a multi-year history of serving this neighborhood and partnering with the local Community Benefit Districts in the area.

The MMBA&F's collective vision is a safe and clean business setting that fosters a sense of community, inclusion, and contribution by and for everyone. Through its **Market Street Arts** program, the Mid-Market corridor can thrive as a home to a strong business community, which leads to an increased quality of life and a more beautiful and welcoming neighborhood for current and future residents and businesses.



About Urban Place Consulting

The Urban Place Consulting team has over 75 combined years of experience working in 26 states reshaping and reviving business districts. We have worked in Mid-Market and the Tenderloin for the past seven years and thoroughly understand the economic, social, and institutional issues facing the neighborhood.

Our team members that have worked on this strategic plan and represent the Mid-Market Business Association & Foundation include:

Steve Gibson is the Executive Director of the Mid-Market Business Association & Foundation and has provided consulting services to downtowns for 33 years. His role is overall management and keeper of the vision. Steve provides public and political outreach.

Fernando Pujals serves as the Deputy Director of the Mid-Market Business Association & Foundation. On this project, he is responsible for communication and community outreach, which includes working with arts organizations and property owners to develop activations. Fernando began his work in Mid-Market leading a storytelling program that evolved from the San Francisco Mayor's 2015 Civic Center/Tenderloin Strategy, and he also served as Senior Manager for the Tenderloin CBD overseeing both communications and public maintenance.

Cassie Hoeprich provides program management, research, and city government relations. Cassie has worked in the area for nearly a decade, with past positions in the San Francisco Planning Department, the Mayor's Office, and the Office of Economic and Workforce Development.

Rob Ready provides arts & entertainment production support and small business support. Rob has over a decade of experience in building communities from disparate groups through live event production and administration, including his time as a co-owner and co-founder of the Tenderloin-based Piano Fight venue.

Rena Leddy is an advisor. Rena has 30 years of experience in management positions with business improvement districts, including President & CEO of three business improvement districts. She has a depth of experience in public space activation and developing programs to attract new businesses.