PRESENTATION OVERVIEW

1. Neighborhood Profile

2. Neighborhood Strategy Process

3. Next Steps
Excelsior & Outer Mission Neighborhood Commercial District (NCD)
### DEMOGRAPHIC PROFILE

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
<th>Citywide Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>POPULATION</strong></td>
<td>63,620</td>
<td>840,770</td>
</tr>
<tr>
<td><strong>HOUSEHOLDS</strong></td>
<td>17,610</td>
<td>353,290</td>
</tr>
<tr>
<td><strong>FAMILY HOUSEHOLDS</strong></td>
<td>13,400</td>
<td>2.3</td>
</tr>
<tr>
<td><strong>FAMILY HOUSEHOLDS</strong></td>
<td>76.1%</td>
<td>65%</td>
</tr>
</tbody>
</table>

- **FOREIGN BORN**
  - **52.9%**
  - vs 35% citywide

- **AVERAGE HOUSEHOLD SIZE**
  - **3.6**
  - vs 2.3 citywide

- **AVERAGE FAMILY HOUSEHOLD SIZE**
  - **4.2**
  - vs 3.3 citywide

### OWNERS

<table>
<thead>
<tr>
<th>Tenure by Household</th>
<th>Excelsior and Outer Mission</th>
<th>San Francisco</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
<td>64%</td>
<td>64%</td>
</tr>
<tr>
<td>Renter</td>
<td>36%</td>
<td>36%</td>
</tr>
</tbody>
</table>

DEMOGRAPHIC PROFILE

RACE & ETHNICITY

- **Asian**: 51%
- **White**: 27%
- **Latino/a**: 20%
- **Other/two or more races**: 1%

**Source**: US Census American Community Survey 2011-2015

LINGUISTIC ISOLATION (LI)

- **Spanish LI**: 23%
- **Asian Pacific LI**: 34%
- **Other European LI**: 37%
- **Other LI**: 0%

**Source**: US Census American Community Survey 2011-2015

AGES

- **0-4 years**: 5%
- **5-17 years**: 12%
- **18-34 years**: 25%
- **35-59 years**: 21%
- **60 and over**: 36%

**Source**: US Census American Community Survey 2011-2015
DEMOGRAPHIC PROFILE

MEDIAN HOUSEHOLD INCOME
$70,610
vs $81,950 citywide

MEDIAN FAMILY INCOME
$73,320
vs $96,730 citywide

UNEMPLOYMENT RATE
9%
vs 7% citywide

JOB SECTORS EMPLOYING NEIGHBORHOOD RESIDENTS

<table>
<thead>
<tr>
<th>Sector</th>
<th>Neighborhood</th>
<th>Citywide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Services</td>
<td>30%</td>
<td>17%</td>
</tr>
<tr>
<td>Managerial and Professional</td>
<td>28%</td>
<td>53%</td>
</tr>
<tr>
<td>Sales and Office</td>
<td>22%</td>
<td>21%</td>
</tr>
<tr>
<td>Product Transport and Material Moving</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>Natural Resources Construction and Maintenance</td>
<td>9%</td>
<td>4%</td>
</tr>
</tbody>
</table>

EDUCATION

- High school or less: 26% citywide
- Some college AA degree: 20% citywide
- College degree: 33% citywide
- Graduate professional degree: 21% citywide

SF Planning Commission Hearing

**High Injury Network**

- Muni bus line
- Muni train line
- High Injury Network


### MUNI Bus Routes

<table>
<thead>
<tr>
<th>Type</th>
<th>Routes</th>
<th>Source: San Francisco Municipal Transportation Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>North-South</td>
<td>14, 49, 52, 14R, 14X, 88BART Shuttle</td>
<td></td>
</tr>
<tr>
<td>East-West</td>
<td>43, 91 OWL, 54, 29, 44 8BX</td>
<td></td>
</tr>
</tbody>
</table>

**Glen Park Station**

- 8,300 riders/day

**Balboa Park Station**

- 18,000 riders/day

**Geneva & Mission**

- Boardings: 7,313
- Alightings: 7,087

Source: San Francisco Municipal Transportation Agency

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_Sources:
- High Injury Network: Vision Zero Fatality Reporting Map
- BART Ridership: 2015 BART Station Profile Study_
PUBLIC & CIVIC INSTITUTIONS

- Public K-12 Schools (including public charter schools)
- Parks, Recreation, & Open Space
- Excelsior and Outer Mission Neighborhood Commercial District

- City College of SF
- McLaren Park
- Crocker-Amazon Playground
- Persia Triangle: Heart of the Neighborhood
- Public Art
- Excelsior Mural
- Public K-12 Schools
- Parks, Recreation, & Open Space
- Excelsior and Outer Mission Neighborhood Commercial District

- Over 398 acres of park land & recreation assets over 10 sites
- 15+ religious institutions
- 2 childcare centers on Mission St.
HOUSING

Market-Rate Projects in the Pipeline
100% Affordable Housing
Jewish Home of San Francisco
Excelsior and Outer Mission Neighborhood Commercial District

PROJECTS IN THE PIPELINE < 10 Units

<table>
<thead>
<tr>
<th>TOTAL</th>
<th>Market rate</th>
<th>Affordable</th>
</tr>
</thead>
<tbody>
<tr>
<td>908</td>
<td>509</td>
<td>399</td>
</tr>
</tbody>
</table>

18,270
HOUSING UNITS
in Excelsior & Outer Mission
vs. 383,680 citywide

82.3%
SINGLE FAMILY HOUSING
vs. 31.9% citywide

### HOUSING STOCK & HOUSING COSTS

#### MEDIAN LIST PRICES AND RENT OF SINGLE FAMILY PROPERTIES

<table>
<thead>
<tr>
<th>Zip Code 94112</th>
<th>Median Home Value</th>
<th>Median Rent</th>
</tr>
</thead>
<tbody>
<tr>
<td>$917,500</td>
<td>$3,816</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>San Francisco</th>
<th>Median Home Value</th>
<th>Median Rent</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1,194,300</td>
<td>$4,285</td>
<td></td>
</tr>
</tbody>
</table>

Source: Zillow Home Value Index Summary, Zillow Rental Index Summary (July 2017)

#### AFFORDABLE RENTAL & SALES PRICES FOR A 4 – PERSON HOUSEHOLD*

<table>
<thead>
<tr>
<th>Income Level</th>
<th>Sales Price</th>
<th>Rent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Low-Income (up to 50% of Area Median Income)</td>
<td>$147,000</td>
<td>$1,300</td>
</tr>
<tr>
<td>Low-Income (up to 80% of Area Median Income)</td>
<td>$260,000</td>
<td>$2,000</td>
</tr>
<tr>
<td>Moderate-Income (up to 120% of Area Median Income)</td>
<td>$432,000</td>
<td>$3,000</td>
</tr>
<tr>
<td>Middle-Income (up to 140% of Area Median Income)</td>
<td>$519,000</td>
<td>$3,500</td>
</tr>
</tbody>
</table>

*Assumes a 3-bedroom unit.

Source: Mayor’s Office of Housing and Community Development, San Francisco, 2015

### Owner Housing Cost Burden

- Less than 30% of income spent on housing costs: 0.5%
- 30-50% of income spent on housing costs: 18.4%
- 50% of income spent on housing costs: 61.4%
- Not computed: 19.7%

### Rent Burden

- Less than 30% of income spent on gross rent: 7.2%
- 30-50% of income spent on gross rent: 38.5%
- 50% of income spent on gross rent: 30.6%
- Not computed: 23.7%

NEIGHBORHOOD COMMERCIAL DISTRICT

Variety of Goods & Services Contributing towards a “20 Minute Neighborhood”

Fresh Produce, Grocery Stores & Ethnic Markets

Global Cuisine—over 70 eating & drinking places

Essentials: Post Office, Pharmacies, Hardware, Urgent Care, Laundry, Cleaners

7 + Financial Institutions – Credit Unions, Local & National Banks

High Numbers of Salons, Auto Repair, Optometrists, Dentists.

Challenged by vacancy and retail mix.
WHAT IS A NEIGHBORHOOD STRATEGY?

VISION

GOALS

STRATEGIES

IMPLEMENTATION
**TIMELINE**

**Ongoing**
- Relationship-building

**May 2017**
- Kick-off meeting
- Workshops + report

**June thru July 2017**
- Survey + report

**ACTIVITIES**
- • 30 one-on-one meetings with neighborhood leaders
- • 150+ community members attended
- • 150+ community members attended
- • 10 city agencies participated
- • 5 “pop-up” workshops
- • 250+ people participated
- • Workshop report published

**OUTPUTS**
- • Survey received 970 responses
- • Survey results published
The draft provided an overview of the project area.

- 31 neighborhood stakeholders
- 21 meetings to date
- Subgroups:
  1. Land Use & Housing
  2. Mobility
  3. Public Realm
  4. Businesses & Service Providers
WORKING GROUP

• **Purpose:** The Working Group will establish goals for the future of the neighborhood; identify, prioritize, and reach consensus on the strategies that can realize those goals.

• **Why Establish a Working Group:**
  — Build Relationships through Consistent Attendance
  — Promote Team Work & Compromise
  — Encourage New & Diverse Voices:
    • Homeowners & Tenants, Shop owners, Property Owners, Seniors & Young People, Seasoned Advocates & New Neighbors— and more!

• **Work To Date:**
  — Over 60 people applied; 31 selected
  — Held 21 meetings, tours, & walks since July 2017
  — Open to and Encourage Participation of All Members of Public
"I am retired now, and I want to make a positive contribution somehow: it’s cool to have this opportunity to brainstorm and guide the future of the neighborhood."

"...I'm taking away...a better understanding of our planning process, learning about different perspectives of group members and a better understanding of my neighborhood."
ULYSSES | AKA “The Excelsior Guy”

Homeowner, lives with his mother and 2 sisters, SFPD Academy, resident of Mission Terrace near Balboa Park Station, 25 years old.

“We need to create a plan...for the neighborhood. We are going to have lots of new and longtime residents. I am passionate about connecting these people—especially youth.”

PHOTO

SUSAN | Safety and Community Engagement Advocate

Mother, wife, homeowner since October 2013, bi-racial household, resident of the Outer Mission

“I was motivated to join the working group to improve the safety and quality of life issues in hopes to see the neighborhood become a place where I can envision my daughter growing up in.”
WORKING GROUP

COMMUNITY MEMBERS

Aaron Goodman
Adhi Nagraj
Alan Leung
Anton Jaber
Allyson Ritger
Barbara Fugate
Charlie Sciammas
Chuck Kong Sui
Danielle Bennett
David Hooper
David Latterman
Delia Fitzpatrick
Estela Garcia
Faye Lacanilao
Jason Serafino-Agar
Jeff Rocca
Kabir Seth
Katherine Taylor
Lea Sabado
Lisa Hartmayer
Marco Montenegro
Maribel Ramirez
Mel Flores
Nevada Lane
Rena Macapagal
Roberto Guerrero
Sean Ingram & Andrea Ferruci
Simonne Joseph Moreno
Summer Koide
Susan Lam
Ulysses Rivas Canjura

CITY STAFF

Jorge Rivas, OEWD
Sharon Carrins, Public Works
Kelli Rudnik, Public Works
Cindy Heaves, MOHCD
Matt Lasky, MTA
Kim Walton, MTA
Nick Smith, MTA
James Pappas, Planning
Seung Yen Hong, Planning
Ru’a Al-Abweh, Planning
Aaron Yen, Planning
ASSETS

DIVERSITY

BUSINESS MIX

TRANSIT

CIVIC SPACES

CULTURE & COMMUNITY

COMMUNITY GROUPS
WHAT WOULD BEST IMPROVE YOUR EXPERIENCE OF MISSION? OF GENEVA?

CLEANLINESS

BUSINESS MIX

SAFETY & SECURITY

GREENING THE STREET

HOUSING

GETTING AROUND
As our neighborhood changes, we support, sustain, and enhance what makes our neighborhood special: our families, economic and ethnic diversity, small businesses, & local gems.
NEXT STEPS
NOW THROUGH FEBRUARY 2018

1. Refine strategies & prioritize
2. Circulate draft strategy
3. Focus Groups for feedback on strategy
4. Incorporate feedback
5. Publish final strategy
6. Begin implementing Phase 1

Begin Phase 2