



D O W N T O W N
SAN DIEGO
P A R T N E R S H I P

2020 ANNUAL REPORT

A LETTER FROM OUR CEO & CHAIR

To our members, friends and community,

Like it has been for many of you, this has been an unprecedented year for Downtown San Diego due to COVID-19. But in the face of those challenges, we have seen our community's ability to adapt, innovate and support one another in new ways time and again. As an organization that has seen more than 40 years of growth, challenges overcome, and dreams realized in Downtown, we are confident there is a bright future ahead.

Through the uncertainty of this year, we adapted our processes, goals and strategies. We have worked in new ways and provided new services to better meet the needs of our members, businesses, property owners, and residents.

In addition to the team's nimble response to meet this new reality, we are proud of all they have accomplished this year. Our Downtown Partnership Clean & Safe team of essential employees maintained our staunch commitment to staff health and safety while still providing excellent maintenance, safety and outreach services for our community – in most cases 24 hours a day, seven days a week. We found new ways to engage with our members through virtual programming and benefits, and our first ever socially-distant, outdoor Installation Celebration including the final KEVTalk was a great success!

We reinvigorated our Political Action Committee and rose to the occasion to advocate for immediate solutions like financial and regulatory support and policies to help our members and business community stay afloat. We were also at the table alongside regional leaders including both Mayor Faulconer and then mayoral candidate, now Mayor Todd Gloria to plan for the needs of our region's recovery.

This year, we also made time for reflection as an organization and discussion among our team and Board to reinvigorate our commitments to diversity, equity and inclusion. This included laying out tangible ways our efforts can help create a more welcoming Downtown from a focus on board representation to public art.

We are all looking forward to better days ahead and know that our mission to advance the economic prosperity and cultural vitality of Downtown is more important than ever. In the year to come we're excited to work together on further defining the character of our neighborhoods through placemaking and beautification projects; continuing to support the businesses that help give Downtown its unique character; building creative programs to support the cultural vibrancy of our neighborhoods; and supporting big projects that are going to transform Downtown into an up-and-coming industry cluster for the life science and tech industries like those by Kilroy Realty, IQHQ and Stockdale Capital Partners.

As this year ends, we want to thank all our members, vendors, business community, property owners, and Downtown residents for the numerous adjustments they have had to make this year. A special thank you to our Board of Directors who are a continual source of inspiration, encouragement, and support.

In the months and year to come, we encourage you to stay involved and invite you to come rediscover all that Downtown San Diego has waiting for you. Our vibrant neighborhoods are open for business and ready to bring you your next outdoor adventure, delicious meal, great find, or opportunity for your business and ideas to grow. We are honored to continue serving as the voice of Downtown with your support and confidence.

Best,

PRESIDENT & CEO
BETSY BRENNAN



Betsy Brennan

BOARD CHAIR
JAMES LAWSON



[Signature]

OFFICERS

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Presidio PAG, Inc.

Vice Chair

Chanelle Hawken

Cox Communications

Immediate Past Chair

Sumeet Parekh

HP Investors, LLC

Treasurer

Phil Rath

Rath Miller

Chief Legal Officer

Bill Sauls

William H. Sauls, Attorney at Law

Secretary

Rana Sampson

Union Bank

President & CEO

Betsy Brennan

Downtown Partnership

ECONOMIC PROSPERITY

CURBSIDE SAN DIEGO



- 25% increase in sales at participating locations
- 5 additional Curbside locations being implemented as part of a pilot project
- 12 business, hospitality industry, neighborhood, environmental and mobility groups joined us in support of Curbside initiative

In May of 2020, the Downtown Partnership along with strategic partners released its Curbside San Diego proposal in response to the economic shutdown caused by COVID-19. The proposal, which advocated for the flexible use of the public right-of-way to assist businesses with outdoor operations, quickly took shape with launch of a pilot project adjacent to Achilles Coffee in the Cortez neighborhood. From there the program expanded in various forms throughout Downtown, including a 1,600 square-foot outdoor parklet located in the Columbia District, supported by a generous sponsorship from U.S. Bank. With the support of the Downtown community, our board and stakeholders, not only did this program further Downtown San Diego as a national leader in the creative use of public space, it also continues to expand and assist businesses.

LOYALTY PROGRAM



- \$22,000 of investment raised from donors to support participating businesses
- \$45,000 of total revenue generated in ten days of digital gift cards sales thanks to donor discount incentive
- \$80,000 projected overall impact of Downtown Loyalty with third sale late 2020 thanks to donor support

We know local businesses in our hospitality industry in Downtown San Diego who had to temporarily close or pivot their services because of COVID-19 are facing an uphill battle. Thanks to the support of our donors and the City Center Business District – a special district under our management – the Downtown Partnership was able to offer special deals from those local businesses. Your donations of funding were used to offer gift cards or packages at discounted prices, getting a great deal for new Downtown Loyal customers and directing immediate much-needed revenue to participating businesses. Over three successful sales the Downtown Loyalty store became an easy, digital way for Downtown residents and visitors to support small businesses they know and love and be introduced to the others that create Downtown’s unique vibe.

ADVOCACY

The Downtown Partnership builds upon more than 40 years of successful advocacy and expertise to advance the needs of our members, property owners, businesses and residents. Representing San Diego through the California Downtown Association, we successfully lobbied in the State Legislature to both pass and oppose items important to Downtown. The reputation behind our diverse membership also empowered the Downtown Partnership to advocate for future-forward projects that will transform Downtown's skyline. In a year of unprecedented voter turnout, we saw tremendous member engagement around the reinvigoration of our Political Action Committee, including successful endorsements in the race for Mayor and the City Council district that includes Downtown. Insight from our members also helped prepare our President & CEO, Bestsy Brennan, to serve on Mayor Faulconer's Responsible COVID-19 Economic Reopening Advisory Group as well as Mayor Todd Gloria's Back to Work SD, a Blueprint for Our Recovery.



- **\$159,000 raised to spend on local races and initiatives**
- **\$1.3 million advocated for to commence design of the Gaslamp Promenade**
- **5 Get Out the Vote murals installed in collaboration with Facebook's Artist in Residence Program**

CULTURAL VITALITY

SOCIAL EQUITY & RACIAL JUSTICE PLACEMAKING

In August 2020, residents, visitors and the Downtown workforce were greeted by a powerful art installation along Broadway highlighting the work of San Diego-based artist Anthony Tyson to inspire ongoing conversations about the movement to change the course of unnecessary violence levied against Black communities. The Downtown Partnership believes strongly in its duty to ensure organizational efforts are promoting equality and addressing systemic injustice and racial discrimination wherever they exist. While we recognize that one project will not bring back those who are victims of racism and violence, with your support we hope to help inspire discussion and foster a greater sense of cultural vibrancy through placemaking, particularly projects that highlight historically disadvantaged cultural institutions and artists.



- **7 artists responded to our public call, expanding our network of talent from under-represented communities of color**
- **9 positive media placements secured to bring light to this important topic**
- **20 donors contributed to make this effort possible through exclusively private funding**

HOMELESS OUTREACH

In 2020 the Committee on Downtown Homelessness was officially formed to have dedicated time for planning and discussion of proactive action the Downtown Partnership can take on this important issue. Your support has also meant that our homeless outreach team has been able to continue making a big difference even in the face of the realities of COVID-19. Whether it was conducting outreach to provide access to food, water, personal protective equipment and hygiene kits, working alongside our collaborators for Operation Shelter to Home at the Convention Center, or continuing to be an access point for our unsheltered residents to get off the street and begin a new chapter of their lives, our homeless outreach team has proven time and again why they are recognized as a best practice team throughout the region. Special thanks to the Lucky Duck Foundation, Union Bank, Bank of America, San Diego Housing Commission, The ROCK Church and County Supervisors Cox, Gasper and Fletcher for their support through donations and grants.



40 coordinated outreach events with other providers to emphasize access to homeless services



6,400 meals, **9,800** waters distributed during shelter-in-place orders when access to food and water was extremely limited thanks to the Lucky Duck Foundation



293 unsheltered clients reconnected to their support systems through the Family Reunification Program



93 unsheltered clients assisted into permanent housing

MAINTENANCE & SAFETY

As with any year, our Downtown Partnership Clean & Safe Maintenance and Safety Ambassadors were the familiar faces caring for Downtown's neighborhoods. But this year, with your confidence, they did all that and more as the essential employees there for our neighborhoods through COVID-19. In a matter of months, they proactively increased pressure washing of sidewalk blocks by 20% and doubled efforts to sanitize high touchpoints in the public right of way. They provided janitorial and pressure washing services for enough miles of Downtown's sidewalks to make it almost a full round trip from San Diego to New York and continued to beautify our neighborhoods and gateways through landscaping and improvements. With your support, they added additional safety patrols, so Safety Ambassadors are present in Downtown 24 hours a day for the first time in 10+ years. They were also there for Downtown's neighborhoods through 23 days of protest activity, making sure to respond quickly to any property damage or maintenance needs.

- **112,724** security checks conducted in Downtown
- **48,265** visits conducted to Downtown businesses
- **75,704** blocks of sidewalk cleaned
- **21,465** blocks of sidewalk pressure washed
- **786.47** tons of trash collected
- **38** corner planters added

MEMBERSHIP & PROGRAMS

Over the course of the year, Downtown Partnership members have experienced unparalleled access to cutting-edge programming, advocacy, conversation, and leaders that are driving the future of the Downtown market and the region. Members are finding more value than ever in opportunities to connect with the Downtown Partnership's diverse network of professionals and leaders all while making the needs of their businesses and industries heard, receiving exclusive information and updates, and being part of Downtown's active advocacy and policy priorities.

PROVIDING VALUE IN 2020

We adjusted our member benefits to a virtual access model to best support our members with ways to stay active, connected and involved given the changes of COVID-19. Through our Convos Over Coffee interview series, we highlighted how members across a wide range of sectors were adapting and what excited them about the future for Downtown San Diego. We implemented semi-monthly membership updates to bring attention to exclusive member engagement opportunities, events and resources. We also held focus groups to understand how we could best represent and support businesses in our community when asked to provide input to State, City and County elected officials and government agencies about reopening.

VIRTUAL PROGRAMMING

The Downtown Partnership was quick to pivot from traditional in-person events and meetings to dynamic virtual programming. In March, we launched a webinar series with expert panels to ensure our members had timely information and updates important to the continuation of their businesses. In Q3, our webinar series evolved into Fed & Educated, a virtual educational series offering turnkey solutions to today's most prevalent business challenges. Thanks to the support of our members, we were able to adapt quickly and continue to provide unique virtual content.

NEW IN MEMBERSHIP

UNDERREPRESENTED BUSINESS ENTERPRISES MEMBERSHIP PILOT

After important discussions with many of you about the Downtown Partnership's commitment to cultivating a culturally diverse membership base and Board of Directors in order to lead and govern effectively, we announced the Underrepresented Business Enterprises Membership Pilot Program. Together we hope to foster economic inclusion and provide individuals and businesses with the opportunity to engage with their community, share their voice and vision, and provide their expertise.

MEMBERSHIP HIGHLIGHTS

- 15 virtual programs hosted since March 2020
- 3,000+ webinar registrants
- 40+ featured speakers, from elected officials to industry experts

Tishman Speyer is a leading owner, developer, operator and fund manager of first-class real estate in 27 key markets across the United States, Europe, Asia and Latin America.

Tishman Speyer develops, builds and manages premier office, residential and retail spaces for industry-leading tenants, as well as state-of-the-art life science centers through its Breakthrough Properties venture. Its visionary leadership team and on the ground experts are unparalleled in their ability to foster innovation, anticipate global and local needs, and cultivate new initiatives, such as its tenant amenities platform Zo., and its flexible space and co-working brand Studio. Since its inception in 1978, Tishman Speyer has acquired, developed, and operated 420 properties, totaling 184 million square feet, with a combined value of approximately \$97 billion (US). Its current portfolio includes such iconic assets as Rockefeller Center in New York City, The Springs in Shanghai, TaunusTurm in Frankfurt, and the Mission Rock neighborhood currently being realized in San Francisco.



TISHMAN SPEYER

On the coast of America's finest city, comes a magnificent waterfront development ideal for the advancement of life sciences.

RØDD

The RESEARCH
AND DEVELOPMENT
DISTRICT



IQHQ Giving progress a home

**DOWN
TOWN
SAN
DIEGO**

**DOWNTOWN
SAN DIEGO
PARTNERSHIP**



**grow
urban**

A Tree Planting Movement

Help Downtown bloom and grow!

You can help replenish Downtown's urban canopy by supporting Grow Urban – our Downtown tree-planting initiative to bring back more than 200 missing trees.

To buy a tree or donate visit:
downtownsandiego.org/growurban

A FOCUS ON LIQUIDITY, SUSTAINABILITY & THE YEARS AHEAD

When the effects of COVID-19 first started in March 2020, we focused on two goals:

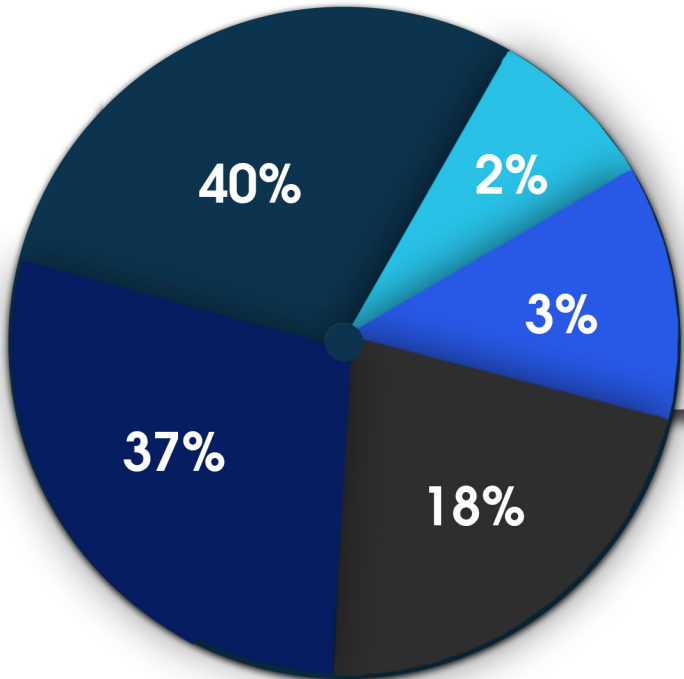
- 1) Understanding its short-term financial effects and making immediate changes to lengthen our cash flow.
- 2) Scenario planning for all revenue lines based on known risks and reflecting pivots to our model in our annual budget.

On the membership side, the Downtown San Diego Partnership projected a 30% loss of revenue. The Clean & Safe program increased its assessment contingency and made budgetary adjustments accordingly.

Our immediate actions implemented in late March/early April allowed us to decrease expenses and focus on our short term sustainability plans.

As we move forward as an organization, our community’s trust in us to manage our budget so we may continue serving San Diego is imperative. That’s why it is important you know that our focus on liquidity, organizational sustainability and effective budgetary monitoring will continue to be our drivers in the months and years to come.

■ DOWNTOWN SAN DIEGO PARTNERSHIP BUDGET*



- COMMUNITY PROMOTION | \$10,000
 - BANNERS | \$36,000
 - PROGRAM FEES | \$248,000
 - MEMBERSHIP | \$481,000
 - EVENTS | \$533,000
-
- TOTAL : \$1.3 MILLION**

■ CLEAN & SAFE BUDGET*

GENERAL BENEFIT (NON PROFIT)	\$ 306,000
CONTINGENCY	\$ 460,000
CEP	\$ 336,000
BEAUTIFICATION	\$ 745,000
CITY FEE	\$ 150,000
ADMINISTRATION & STAFF EXPENSES	\$ 942,000
SAFETY	\$ 2,773,000
MAINTENANCE	\$ 4,430,000
TOTAL	\$ 10.1 MILLION

TOTAL COMBINED FUNDS UNDER MANAGEMENT: \$11.4 MILLION

*Approximated budget figures



A THANK YOU TO OUR MEMBERS

In a year of hard choices, we are honored to continue advancing the economic prosperity and cultural vitality of Downtown San Diego with your support.

FOUNDERS CIRCLE MEMBERS

Ace Parking | American Medical Response | Bank of America | BOSA Development | California Apartment Association | Carleton Management, Inc. | Carrier Johnson + CULTURE | Cavnac & Associates | CBRE | Centerplate | Citywide Group of Companies, Inc. | City Wide Protection Services, Inc. | City Wide Cleaning Services, Inc. | Cox Communications | Cushman & Wakefield | Dentons US LLP | Dynalectric San Diego | EMMES Realty Services of California LLC | Flocke & Avoyer Commercial Real Estate | Gafcon, Inc. | Gensler | Hensel Phelps | HP Investors, LLC | IQHQ, Inc. | JMI Realty | Lankford & Associates, Inc. | reproHAUS/signHAUS | San Diego Gas & Electric | San Diego Padres | ScoutRED | Sheppard Mullin Richter & Hampton LLP | Sycuan Band of the Kumeyaay Nation | Turner Construction | Wakeland Housing and-Development+ Corporation

SUSTAINING LEVEL MEMBERS

Allied Universal | Buchalter | Clark Construction Group - California, LP | C.W. Driver | davisREED Construction, Inc. | Fox Sports San Diego | Higgs Fletcher & Mack LLP | JPI Companies | Kaiser Permanente | Kilroy Realty Corporation | LeBeau Realty & Associates | MA Engineers, Inc. | Pandr Design Co. | Republic Services, Inc. | Scripps Health | SSP America | Stockdale Capital Partners, LLC | Suffolk | Swinerton | The Casey Brown Company | Union Bank | U.S. Bank | Verizon | Wells Fargo Bank

THANK YOU TO OUR DONORS

DOWNTOWN LOYALTY

Cavnac & Associates | CBRE | City Center BID | East Village Association | Jim Dawe J.C. Ward | HP Investors | Juniper Strategic Advisory | LaBeau Realty | Presidio Public Affairs Group | Rana Sampson | Union Bank

SOCIAL EQUITY & RACIAL JUSTICE PLACEMAKING

Ace Parking | Alex Guyott | American Medical Response | Bank of America | Betsy Brennan | Cisterra | California Strategies | Cavnac | Cushman Foundation | David Hazan | e3 Civic High | Higgs, Fletcher & Nack | Hyatt | Intesa Communications Group | Katz & Associates | Michelle Brega | Rana Sampson | TSA Construction Inc. | Visual Asylum | Padres Foundation: honoring Johnny Ritchey

LOOKING TO THE FUTURE

If you're still considering a membership, we encourage you to get in touch with us to talk through the bright future that's in store for Downtown and the important role our members and the Downtown Partnership team are going to play in getting us there.

Visit downtownsandiego.org/apply to learn more. Or contact Kaitlin Phillips, Senior Vice President of Membership & Events at kphillips@downtownsandiego.org.

To learn more about the accomplishments of the Downtown Partnership Clean & Safe team over the past fiscal year, visit downtownsandiego.org/clean-and-safe/pbid-meetings-reports

To learn more about the work of the City Center Business Improvement District over the past year, visit downtownsandiego.org/build-your-business/bid



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