



Presidio Planning Socioeconomic Analysis Report

*A Supplement to the
Final General Management Plan Amendment
Presidio of San Francisco
July 1994*

Golden Gate National Recreation Area
California



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**PRESIDIO PLANNING
SOCIOECONOMIC ANALYSIS REPORT**

Prepared for the
National Park Service

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INTRODUCTION

In late 1994 management of the Presidio of San Francisco will be transferred from the United States Department of the Army to the National Park Service. The Presidio will then become part of the Golden Gate National Recreation Area. This socioeconomic analysis report examines the social and economic consequences of four alternatives for management and use of the Presidio of San Francisco under the National Park Service's administration. This document identifies and analyzes the principal social and economic impacts associated with each of the alternatives.

Background

The Presidio is situated just south of the Golden Gate Bridge at the north-western edge of the San Francisco peninsula. It encompasses an area of 1,480 acres and is occupied by hundreds of historic structures, historic forests, native and exotic plant species and an abundance of wildlife. The Presidio was first established by the Spanish in 1776, has been a United States Army Base since the 1840's, and was designated a National Historic Landmark in 1962.

The Presidio is currently in the process of conversion from management by the Department of the Army to operation by the National Park Service (NPS). Once the transfer of responsibility is completed, the Presidio will be managed as a part of the Golden Gate National Recreation Area (GGNRA) pursuant to park enabling legislation passed in 1972.

Planning for the Presidio began in the spring of 1990. Public hearings were held in 1990 and 1991 to gather comments on ideas for the Presidio's future and to identify concerns. In December 1991, based on the ideas and public input gathered in the "visioning" phase, the Park Service produced the *Presidio Concepts Workbook*. Out of this planning work, four development alternatives for the Presidio's future were identified for detailed analysis in a set of two documents released in October 1993: the *Draft Presidio General Management Plan Amendment and Draft Environmental Impact Statement* (NPS 1993). The *Final Presidio General Management Plan Amendment and Final Environmental Impact Statement* (NPS 1994) were prepared after consideration of public agency and citizen review. This *Presidio Planning Socioeconomic Analysis Technical Report* is one of a group of supporting summaries and supplemental studies.

The *Final General Management Plan Amendment* for the Presidio proposes overall concepts for the Presidio's future use. The plan outlines the management and implementation strategies for converting the Presidio, establishes program themes and general tenant selection criteria, proposes a governance structure for administration and presents a phased action plan for managing the transition to the Presidio's new future.

The *Final Environmental Impact Statement* presents the four alternatives for management and use of the Presidio, and analyses the environmental consequences of those alternatives. The document provides a full discussion of the significant environmental impacts associated with the alternatives, and it identifies mitigating measures to avoid or reduce adverse effects.

This *Presidio Planning Socioeconomic Analysis Technical Report* is a supporting document for the *Final General Management Plan Amendment* and *Final Environmental Impact Statement*. The technical analysis identifies the types and extent of the

socioeconomic impacts associated with each of the four alternatives for management and use of the Presidio.

Purpose of the Report

The primary objective of this report is to provide analysis of the socioeconomic impacts of each of the development alternatives under consideration for the Presidio's future management and use. The principal impacts associated with each of the development alternatives are identified and quantified in order to evaluate their magnitude, scope and effects.

The report examines the projected social and economic impacts on both the City of San Francisco and the Bay Area Region. The analysis determines the projected impacts on the local population - discussing the effects of the different development alternatives on population growth, employment and school enrollment in the area. The report also evaluates the anticipated fiscal and economic impacts on the City of San Francisco under each of the alternatives and estimates the potential for revenue generating by concession operations of food, lodging and retail services within the Presidio. In addition, effects on local health care services and housing are determined.

The report has been developed in close consultation and cooperation with the NPS Presidio Planning Team.

Organization of the Report

The report is separated into nine main chapters and an appendix of supporting information:

Chapter I: Socioeconomic Environment. This chapter describes the current baseline conditions of the area surrounding the Presidio. It also provides brief descriptions of the major governmental agencies involved in planning and providing services for the region.

Chapter II: Population, Employment and School Enrollment. This chapter provides the methodology and estimates for the future population, employment and school enrollment impacts anticipated for each of the Presidio reuse alternatives. This section includes employment and building area estimates according to land use categories.

Chapter III: Presidio Payroll. The direct payroll impacts of the Presidio operations under each reuse alternative are provided in this chapter. The payroll estimates are presented according to land use categories.

Chapter IV: Potential New Bay Area Economic Impacts. The direct and secondary economic benefits of the Presidio reuse are estimated using input - output multiplier analysis. The benefits to the City's economy and the Bay Area's economy are provided and the analysis compares the total new employment and earnings impacts between the four reuse alternatives. These benefits from the reuse are compared to the negative impacts of the military closure. Construction employment impacts are also estimated.

Chapter V: Fiscal Impacts. The first part of this chapter provides the methodology and results of the analysis of the fiscal impacts, in terms of both revenues and costs, to the City of San Francisco. Cost impacts are estimated for the principal city services: police, fire, emergency medical services, storm drainage, water and wastewater services.

Transportation services are discussed in the *Presidio Transportation Planning and Analysis Technical Report* (Peccia & Associates 1994). The anticipated revenue increases from property taxes (possessory use tax), sales taxes, business taxes, and several other "general government" revenue sources are also estimated. The fiscal model used in this analysis is provided in detail in Appendix A of the report. A separate section in this Chapter contains estimates of increased sales tax revenues to the State of California General Fund and to the Bay Area Rapid Transit District. Finally, Chapter V contains estimates of increased revenues to San Francisco public schools from special sales tax revenues and Federal Impact Aid Program reimbursements.

Chapter VI: Market Overview of Non-Profit Organizations as Potential Tenants.

This chapter describes the nature of the non-profit "market" in San Francisco and the Bay Area. It also presents the results of a limited telephone survey of respondents to the Call for Interest and profiles the operations of several other Bay Area developments that have targeted non-profit tenants. Reference sources containing listings of non-profit organizations are provided in Appendix B.

Chapter VII: Food, Lodging, and Retail Revenue Projections. The future concession revenues are estimated in this chapter. The methodology used in the analysis and the revenue differences between reuse alternatives are discussed in this part of the report. The revenue projections for each reuse alternative are provided in Appendix C.

Chapter VIII: Health Care Services and Medical Research. This chapter examines the projected effects on the local health care system and economy associated with different utilization of the two existing health care complexes within the Presidio: the Letterman complex and the vacant U.S. Public Health Service hospital. The impacts under the four reuse alternatives are examined.

Chapter IX: Housing. This chapter estimates the housing supply and demand at the Presidio and in the surrounding region as a result of Presidio employment under each of the reuse alternatives. The analysis also calculates the expected net effects of the Presidio housing demand on the surrounding region. These effects are estimated under each of the different reuse alternatives.

Alternatives Overview

A general philosophy for managing the lands within the Golden Gate National Recreation Area is provided in the 1980 *General Management Plan* and is currently being supplemented by *Final General Management Plan Amendment* and *Final Environmental Impact Statement*. All of the alternatives are consistent with the objectives of the general management plan.

Four alternatives have been formulated for future management and use of the Presidio:

Alternative A. (Proposed Action) Diverse Programming / Environmental Stewardship - Public / Private Partnerships

Alternative B. (No Action / Minimum Requirements) Public Sector Enclave

Alternative C. Expanded Open Space / Restoration / Interpretation - Traditional NPS Management

Alternative D. Partial Military Reuse - Public / Private Partnership

The alternatives differ primarily in their approach to overall management, level of resource preservation and enhancement, and diversity and extent of visitor programs. Alternatives A and D call for a congressionally authorized partnership institution to work with the National Park Service in providing overall management at the Presidio; Alternatives B and C propose the use of existing federal authorities for management. Alternatives A and C offer more diverse and extensive visitor programs and recreational opportunities; Alternatives B and D involve fewer such visitor programs and opportunities. A summary of the alternatives follows:

Alternative A:

The vision for the Presidio is to transfer it into a park setting "ready to house a network of national and international organizations devoted to improving human and natural environments and addressing our common future." Proposed activities and programs will contribute to historical and natural interpretation, cultural and environmental awareness, scientific discovery, outdoor recreation, and other visitor experiences. Upgraded infrastructure, rehabilitated facilities and landscapes, and new management practices will support activities and programs throughout the park.

The National Park Service will be responsible for overall management of the Presidio, and a federally chartered institution will be created to assist in managing park partners and tenants. A museum/visitor center will be established at the main post, and smaller visitor contact stations will be developed throughout the rest of the park. Park partners will offer extensive programs on the Presidio's resources and history and on global issues, and they will promote cultural diversity and international understanding.

The main post will be a visitor activity and global center with a broad range of environmental and cultural programs. A conference center will be developed at Fort Scott. Legislation will be requested to extend the park boundary to include the Public Health Service hospital, which will be used for conference and residential education activities. The Letterman complex will be used as a science research and education center. A large number of nonhistoric buildings and a few historic buildings will be removed to enhance cultural, natural, and recreational settings. Recreational resources throughout the park will be developed for public use. The Sixth Army will remain at the Presidio and will retain approximately 1.8 million square feet of building space under a use and occupancy agreement.

Alternative B:

This alternative would be the minimum action alternative. The NPS would be responsible for overall management of the park, but building uses and other lease arrangements would become the responsibility of the General Services Administration. No buildings would be removed. Visitor and recreational programs and activities would be concentrated in existing open space areas. The Public Health Service hospital would remain outside the park boundary.

Alternative C:

Alternative C would be the alternative for management most similar to other NPS properties. The NPS would be solely responsible for management of the park. Most nonhistoric structures would be removed. Cultural and natural resources protection, restoration and interpretation would be emphasized. The Letterman complex would be legislatively removed from within the park boundary so that it could be used for non-park

activities, and the Public Health Service hospital would remain outside the park boundary.

Alternative D:

This alternative would be similar to alternative A, except that the Department of Defense would continue to use and manage the Letterman complex and about 650 housing units. The Public Health Service hospital would remain outside the park boundaries.

Highlights of the Analysis

- All of the reuse alternatives have similar or lesser land use and population densities than those currently at the Presidio.
- Direct Presidio employment projections for the alternatives show a range of between 2,600 and 4,200 for the year 2000; and between 3,200 and 5,400 jobs for the year 2010. This compares with current Presidio employment of approximately 5,500.
- Annual payroll earnings (in current dollar terms) within the Presidio are projected to range between \$76 million and \$141 million for the year 2010. This compares with current annual payroll earnings of \$70 million at the Presidio.
- Between 1,180 and 2,100 construction jobs would be directly generated annually in the construction industry between 1994 and 2000. During the second phase of implementation, annual construction jobs at the Presidio are projected to range between 440 and 620 depending on which of the alternatives are adopted.
- Indirect employment effects will about double the total jobs associated with the Presidio in the region.
- Concessions revenues from Presidio employee, resident and visitor expenditures on food and beverages, retail and lodging services would range between \$20.6 - \$27.7 million annually in the year 2000, and would range between \$29.0 - \$42.5 million annually in the year 2010.
- By the year 2010, Presidio housing is estimated to meet between approximately 45 percent and 103 percent of the projected employee housing demand under the various alternatives. In any case, no major new housing demand is expected in San Francisco.
- Police, fire and emergency medical services will be provided by the National Park Service, and therefore are expected to have no significant impact on city services.
- The City of San Francisco will be reimbursed by the National Park Service for city sewage and water use; these services are available and the rates paid for these services will cover the costs.

- Various revenues to the City of San Francisco will increase substantially since no taxes are currently generated by the military use of the Presidio. The city could expect between \$2.8 - \$4.1 million in additional revenues annually from sales, possessory use, hotel, and business taxes if all taxes are applicable.
- Annual retail sales tax revenues to the State from Presidio retail activities would range between approximately \$1.2 - \$1.5 million by the year 2010.
- Annual retail sales tax revenues to the Bay Area Rapid Transit District from Presidio retail activities would range between approximately \$108,000 - \$133,000 by the year 2010.
- Presidio reuse would generate net revenue increases ranging from approximately \$137,000 to \$402,000 annually for San Francisco public schools.

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I. SOCIOECONOMIC ENVIRONMENT

A. Bay Area Region

The area within 50 miles of the Presidio of San Francisco is referred to as the Greater San Francisco Bay Region. It is a major western U.S. population, economic, and financial center. The Bay Area includes nine counties with a total population of 6,023,577 in 1990. The counties include: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma. The Bay Area has one fifth of the state's total population of 29,760,000.

1. Population

The Bay Area has been undergoing a decentralization of population and employment over the last 50 years. In 1940 two thirds of the people and jobs were in San Francisco and Alameda counties. By 1990 only one third lived in these two counties and 39 percent of the jobs were there. The region is an amalgam of heavily urbanized areas with smaller urban and suburban communities scattered in the valleys surrounding the urban core and the Bay. There are five Primary Metropolitan Statistical Areas in the region: Oakland, San Francisco, San Jose, Santa Rosa-Petaluma, and Vallejo-Fairfield-Napa. Between 1990 and 2010 the Bay Area population is expected to increase by 1.5 million, a 25 percent increase. This growth rate is slightly less than the 30 percent increase experienced over the past 20 years.

2. Employment

The economic base of the Bay Area is highly diversified. The Bay Area is one of the nation's centers for high technology companies supporting the computer, electronic, medical, and defense industries. Approximately half of the 503,930 manufacturing jobs are in high technology. Other major manufacturing industries in the region include food processing, steel fabricating, printing and publishing, light manufacturing, and warehousing. In addition, both San Francisco and Oakland are major shipping ports. The Bay Area is a major center for banking and finance for the western United States. Medicine and education are leading service sector industries with several nationally and internationally recognized institutions. Tourism is also a major part of the Bay Area economy. In 1991, the San Francisco Visitor and Convention Bureau estimates 13.2 million people visited the City of San Francisco and spent \$3.9 billion.

The Bay Area's total number of full and part time jobs was approximately 3,114,449 in 1990. The Association of Bay Area Governments forecasts that regional employment will increase to 3,631,100 by 2000 and to 4,128,080 by 2010 - a one-third increase for the region in the 20-year period. This compares to an 83 percent increase from the 20-year period of 1970 to 1990.

As shown in Tables 1 and 2, in the next 20 years the region's employment is expected to continue to be concentrated in services, wholesale and retail trade, and manufacturing sectors.

Table 1.1: Bay Area Employment Projections, 1990 - 2010
(Number of Employees)

<i>Industry</i>	<i>1990</i>	<i>2000</i>	<i>2010</i>
Agriculture, Mining	34,640	33,520	31,570
Construction	168,120	200,930	210,000
Manufacturing	503,930	570,790	632,910
Transportation, Commerce, Utilities	190,590	225,810	260,470
Wholesale Trade	190,530	221,290	254,250
Retail Trade	525,540	604,710	688,260
Finance, Insurance, Real Estate	231,280	246,970	260,480
Services	1,010,990	1,258,900	1,511,850
Government	258,820	268,210	278,290
TOTAL	3,114,440	3,631,130	4,128,080

Source: Association of Bay Area Governments (July 1992 projections)

Table 1.2: Bay Area Employment Projections, 1990 - 2010
(Percent of Total Employment)

<i>Industry</i>	<i>1990</i>	<i>2000</i>	<i>2010</i>
Agriculture, Mining	1	1	1
Construction	5	6	5
Manufacturing	16	16	15
Transportation, Commerce, Utilities	6	6	6
Wholesale Trade	6	6	6
Retail Trade	17	17	17
Finance, Insurance, Real Estate	7	7	6
Services	33	35	37
Government	8	7	7
TOTAL	100%	100%	100%

Source: Association of Bay Area Governments

3. Housing

The San Francisco Bay Area has some of the nation's highest housing costs. Over the last decade increases in new housing construction grew markedly in the east, south, north bay suburban counties. Land, construction, and living costs are well above the national average. Low density housing and employment development at the fringes of the Bay Area, where land costs are lower, has helped create a dispersed land use pattern which increases the need for automobile travel. These conditions may increase as the Bay Area's employment base grows, and competition increases for the limited supply of housing within reasonable commuting distance (U.S. Army Corps of Engineers [USACE] 1991).

B. City of San Francisco

1. Population

As suburbanization and decentralization occurred in the Bay Area, the population in San Francisco decreased 13 percent between 1950 and 1980. However, from 1980 to 1990 the population increased 7 percent to approximately 724,000. From 1990 to 2010 the City's population is forecast to increase 8 percent to 778,900 (Association of Bay Area Governments [ABAG] 1992). The City and County of San Francisco is one of the most densely populated areas in the United States. The City has a land area of 46 square miles and a population density of 24.2 people per acre.

In the last decade San Francisco's population became increasingly diverse. The 1990 Census reported an ethnic breakdown of approximately 47 percent White, 29 percent Asian, 14 percent Hispanic, and 11 percent Black. Asian, Pacific Islander, and Hispanic origin populations grew while other ethnic group populations declined. San Francisco has a particularly high proportion of relatively recent immigrants from Asia and South America (San Francisco Department of City Planning 1991a).

2. Employment

San Francisco is an office, retail and services center. Many corporate headquarters are located in downtown San Francisco and the City has regional offices of several Federal departments and agencies. The City is a regional center for health care and health research. Services, the largest industry sector in 1990 accounting for 38 percent of the employment, is expected to increase to 46 percent of employment in San Francisco by 2010 (ABAG 1992). These services include business and finance, accounting, travel, advertising, personnel, legal, engineering, private educational, medical professional, and non-profit organizations.

Job growth was stagnant between 1980 and 1985. Since then jobs have increased in business and legal services, health, education, social services, retail trade, and hotels. Job losses have continued in finance, communications, construction, wholesale trade, and manufacturing. Between 1990 and 2010 employment in San Francisco is expected to increase about 5,000 jobs annually (ABAG 1992).

3. Tourism

Due to the San Francisco's desirability, tourist, convention and trade show activities contribute substantially to the local economy. Despite an increase in hotel room inventory, room occupancy averages still exceed the national average. Total visitor spending has been estimated at roughly \$3.9 billion in 1991, or \$10 million per day, with out-of-area visitors spending three-fourths of this total. An 11 percent transient occupancy tax provided the City with an estimated \$76.6 million in revenues in 1992-93. Approximately 66,400 jobs are directly related to tourism and visitor spending. With 87 percent of visitors reporting a visit to Fisherman's Wharf, 68 percent to the Golden Gate Bridge, and 29 percent to Alcatraz, tourist sites along the northern waterfront are already highly visited (San Francisco Convention and Visitor Services 1992).

4. Housing

Housing in the City of San Francisco itself is in limited supply, and ownership is out of reach for many residents. Approximately one-third of housing units in San Francisco are owner-occupied, and two-thirds of San Francisco residents are renters. The median price of a home in San Francisco was \$275,000 in 1992. The average rent for a San Francisco two-bedroom apartment was \$990 in 1992 compared to \$780 in the Bay Area. San Francisco had an estimated 328,471 housing units in 1990, and relatively low vacancy rates. There is a shortage of housing for low and moderate income groups, and as a result, the City has a number of efforts underway to develop or rehabilitate affordable housing for rental or purchase. The City also has a large and growing number of homeless people who live in City shelters and on the streets (San Francisco Mayor's Office of Housing and Community Development 1992).

5. Health Care

There are 47 acute care hospitals in the eight-county Bay area and 8 general acute care hospitals in San Francisco. Within San Francisco the acute care hospitals have 4,841 beds according to the State of California Annual Report of Hospitals, 1989. San Francisco has 38 percent of the total 12,762 beds in the Bay Area. The Bay Area has health care institutions that have national and international reputations. These include the teaching and research hospitals at the University of California, San Francisco and Stanford University. Kaiser Permanente, the largest managed health care organization in the country, is headquartered in Oakland.

Within San Francisco there is more than an adequate number of acute care hospital beds. While there is a demand for additional chronic care beds, changing health care practices have resulted in acute care patients being treated on an out-patient basis and reduced length of time for stays in hospitals. Because of economics and the need to provide a full spectrum of research and care options, there have been a number of mergers of hospitals in San Francisco in recent years. This follows a nationwide trend toward hospital consolidation. The hospital market in San Francisco is also highly competitive with smaller, independent hospitals being acquired or merged with larger health care organizations. San Francisco also has a long tradition of non-profit hospitals. There are no private acute care hospitals in San Francisco.

Hospitals in San Francisco have been constrained in expanding their physical plants by limited available land, zoning requirements and neighborhood opposition to expansion into residential areas. For example, St. Mary's was prevented by the California Supreme Court from using eminent domain to acquire and demolish residences in order to build an office building. Davies Medical Center's plans for a heliport were successfully opposed by a neighborhood organization. UCSF was prevented from expanding the Parnassus campus by neighborhood opposition and a "peace agreement" was formulated limiting the space and the population of the campus, and establishing boundaries for development. UCSF has numerous campuses and sites comprising nearly 6 million square feet of space and is conducting a long-range strategic planning process in order to meet future facility needs, particularly for research and training facilities. The City of San Francisco is actively assisting UCSF in identifying potential sites within San Francisco to accommodate the University's future needs; their needs are based on a shortage of laboratory space which affects their ability to receive research funds.

In addition to providing health care services, the health care industry is a major employer and contributor to the economy. In San Francisco, hospitals employ over 30,000 people

(San Francisco Planning and Urban Research Association [SPUR] 1991). UCSF is the largest, non-government employer in San Francisco with a staff of over 14,000. UCSF is also a major recipient of federal health research funds. In FY 91 the institution received \$150 million.

C. Surrounding Neighborhoods

1. Population

The Presidio is bordered by the Marina planning district on the east and the Richmond planning district on the South. The total population of these districts is about 127,300. The population density in the Marina district is about 36 people per acre and the Richmond district has about 17 people per acre. In many of the census tracts directly bordering the Presidio, more than 81 percent of the population is white (San Francisco Department of City Planning 1991b).

2. Land Use

The land uses in the Richmond District to the south and the Marina District to the east and tend to become more commercial in character as they extend toward the city center. Commercial strips with hotels, retail stores, and restaurants near the Presidio occur on several streets, including Lombard Street, and Geary Boulevard. California, Sacramento, Clement, Union, and Chestnut Streets provide neighborhood level retail and restaurant services. A full range of commercial support services can be found in each of the neighborhood shopping districts near the Presidio. However, most of these districts are not within easy walking distance of the Presidio. City policies encourage incorporation of convenient retail support service in major activity centers to discourage the need for auto travel to accomplish daily errands.

Community facilities in the adjacent neighborhoods are provided by a range of private, non-profit and public organizations. Branches of the San Francisco public library are located in the Marina, Presidio Heights and Richmond Districts. San Francisco City College classes are offered in local schools and churches, including the Marina Middle School and Fort Mason. The Jewish Community Center at Presidio and California Streets provides a range of recreational activities and child care. As in most City neighborhoods, active recreation facilities are fairly limited, particularly for organized sports, and the closest public pools are nearly 1 mile from the Presidio. Community services City-wide have been cut back severely in recent years due to continuing budget shortfalls, and as a result, branch library hours, school programs, and other public services are also very limited.

Most lands bordering the Presidio, on the Bay and Pacific Ocean sides, have been irrevocably permitted to the Department of Interior. There is a nearly continuous system of waterfront open space which extends on either side of the Presidio. On the west, this system includes Baker Beach, Land's End, Ocean Beach (connecting there to Golden Gate Park), and Fort Funston, and along the northern Bayfront it includes Crissy Field, the Marina Green, Fort Mason, and Aquatic Park. This network of open space is a major tourist attraction and recreational resource for the Bay Area. At the southern boundary of the Presidio are the City of San Francisco's Julius Kahn Playground and Mountain Lake Park.

3. Housing

The Presidio is surrounded by desirable neighborhoods with some of the most expensive housing and areas of scenic beauty in San Francisco. Adjacent to the Presidio are Presidio Terrace, Presidio Heights, Seacliff, the Marina, and Richmond Districts. As in most San Francisco neighborhoods, narrow lots are densely developed with single family houses, flats or apartment buildings. In the Marina district, half of the residential buildings have 10 or more units. In the Richmond district 17 percent of the residential buildings have 10 or more units, and 28 percent are single family homes. The major employment center, the Financial District, is located two miles or more to the east. There are about 64,000 housing units in the Marina and Richmond Planning Districts (San Francisco Department of City Planning 1991b).

D. Other Governmental Agencies

Following are a description of the major government agencies which are involved in planning, land use and environmental control, and providing services in San Francisco and the Bay Area.

City and County of San Francisco (CCSF) - Many CCSF departments are linked into the conversion process via a Memorandum of Understanding through which a City Task Group, and City Planning Commission and other liaisons were established. Through these means, City interests and concerns have been and will continue to be addressed. The NPS has been cognizant in Presidio planning consistency with a majority of the objectives of "The Master Plan for the City and County of San Francisco (n.d.)."

San Francisco Bay Regional Water Quality Control Board - This regional board is a permit authority concerned with surface and ground water quality and stormwater discharges, and administers the Federal Clean Water Act. Water supply and treatment, sewer, and stormwater system modifications are of interest to this agency. Infrastructure improvement studies are being undertaken with input by the board.

Bay Area Air Quality Management District (BAAQMD) - BAAQMD regulates stationary pollution sources and establishes plans to meet ambient air quality standards consistent with the Clean Air Act of 1970. BAAQMD's air quality modeling and projections were utilized in analyzing effects of the plan. Air emission permits would be the responsibility of relevant park partner tenants.

Metropolitan Transportation Commission (MTC) - The MTC created in 1970 is the Bay Area agency responsible for approving transportation projects receiving federal funding, allocating and prioritizing funding resources, and evaluating and setting guidelines for transportation services, including transit service and bridge tolls. Transportation sections of the plan were assembled with the 1991 "Regional Transportation Plan for the San Francisco Bay Area" objectives in mind. Programming for regional improvements could include state highway and alternative transportation system demonstration projects.

Bay Conservation and Development Commission (BCDC) - The BCDC is a permit authority established by the state in 1965 to review development proposals within its jurisdiction, eastward from the Golden Gate and 100 feet inland from the highest tide. This agency would be interested in implementation actions affecting public access, potential wetland reclamation and any dredging or other actions associated with water ferry-related development at Crissy Field.

Golden Gate Bridge, Highway and Transportation District (GGBHTD) - The District administers permitted lands surrounding the south terminus of the Golden Gate Bridge and regional bus service from Marin County. GGBHTD needs for an improved maintenance area and coordination concerns for regional transit will be elements considered in the plan.

California Environmental Protection Agency (Cal EPA) - This agency represents the state in oversight of hazardous clean-up activities. The Army would have the primary responsibility for remediation, and cooperation with regulatory agencies. The Army's environmental remediation process has begun with Cal EPA involvement, and is expected to continue.

California Department of Transportation (Caltrans) - The Presidio lies in California Department of Transportation District 4. Due to the existence of two major highways, U.S. 101 and State Route 1, effects on traffic are being assessed in Presidio planning, and communication begun on future highway improvements, such as Doyle Drive upgrades currently under discussion.

California Coastal Zones Conservation Commission - This regional commission, California Coastal Commission, jurisdiction is outside of the Golden Gate. This agency would likely be interested in any developments proposed affecting water quality and quantity, sewage treatment, and stormwater discharge as they relate to the Presidio's west coast section.

California Department of Toxic Substances - This state agency will be involved with the Army's remediation of toxic waste sites throughout the Presidio.

U.S. Army Corps of Engineers (USACE) - As the federal permit authority for projects affecting navigable waterways, the USACE approves the disposal of dredging materials in the San Francisco Bay. The agency would review any wetland reclamation or water ferry actions implemented. The USACE is also a partner in reshaping the Presidio's infrastructure system. Current improvement projects and potential innovative technology projects are being coordinated with the Corps.

U.S. Coast Guard - The Coast Guard would not only be interested in projects affecting navigation in concert with the USACE, but is a key figure in the emergency response network in the Bay and sea. The Coast Guard facility was abandoned at the Presidio, however, a helipad remains. The future of the helipad may be of interest to this agency.

U.S. Department of Defense - The Department of Defense is the primary party of interest in the Presidio conversion and a major player in the Presidio's future. Numerous actions specified in agreements which have been or are now being negotiated require ongoing commitment and cooperation, including hazardous waste remediation and potential military reuse of some Presidio facilities.

Additionally, the California Department of Fish and Game, the State Historic Preservation Office, the U.S. Environmental Protection Agency, the U.S. Fish and Wildlife Service, and the Advisory Council on Historic Preservation have interest in aspects of the Presidio plan as described in the Final Environmental Impact Statement.

II. POPULATION, EMPLOYMENT, AND SCHOOL ENROLLMENT

A. Methodology

The estimates of the future population, employment, and school enrollment impacts of the four Presidio reuse alternatives are based on data provided by the National Park Service regarding the types and quantities of facilities which would be provided within the park. The land use data for each alternative are summarized in Table 2.1. Following are explanations of the assumptions and techniques used to estimate future Presidio population, employment, and school enrollment impacts based on these data. The results of the analysis for each alternative are discussed in the Impact Analysis section which follows this Methodology Section.

1. Presidio Population Estimates

This analysis distinguishes between resident population and guest population. Resident population includes those people living in Presidio housing units and dormitory/group housing facilities allocated for staff or military use. Guest population includes those people living in Presidio housing units and dormitory/group housing facilities allocated for guest use.

The estimates of future Presidio resident population are based on the number of housing units which would be available for staff or military use in the Presidio under each of the reuse alternatives. The number of residential housing units available in the various Presidio reuse alternatives is substantial, ranging from about 250 units up to almost 1,100 units. Many residents will be housed in these dwellings; however, it is difficult to state with certainty the number of occupants who would live in these housing units because of the many different types of housing present and a lack of information about the types of occupants who would eventually replace the current residents. To estimate future Presidio residents, the number of available family housing units was multiplied by an average household size of 3.2 persons. The average household size is based on the City of San Francisco's average family household size of 3.21 persons per household (U. S. Census 1990). In comparison, the 1990 statewide average for California family households was 3.32 persons. This analysis assumes that all Presidio housing units remaining under each alternative will be occupied in both 2000 and 2010.

Dormitory/group housing occupancy is estimated on the basis of one occupant per bed. The Park Service has estimated the total number of beds which would be present under each alternative for the years 2000 and 2010.

The analysis estimates the guest population in terms of the average number of overnight visitors staying at the Presidio per night by applying the occupancy factors shown in Appendix C to the visitor accommodations assumptions which are detailed in Appendix D. The analysis assumes that some facilities in the Public Health Service hospital, which would be available in Alternatives A and D in both 2000 and 2010, would not be used for guest accommodations until after the year 2000. While this analysis estimates the average number of overnight guests likely to use Presidio lodging facilities on a given night, Appendix D shows the total capacities of Presidio lodging facilities for each alternative; this represents the upper limit of the number of overnight visitors who could stay at the Presidio if all guest facilities were fully booked.

Table 2.1: Proposed Presidio Building Area by Land Use

Land Use (Square Feet)	Alternative A		Alternative B		Alternative C		Alternative D	
	2000	2010	2000	2010	2000	2010	2000	2010
Dormitory	448,727	484,792	340,551	340,551	342,108	342,108	369,952	369,952
Industrial	322,204	312,299	342,949	342,949	322,459	301,352	362,323	360,767
Infrastructure	78,295	46,153	80,168	80,168	46,343	46,318	47,197	47,197
Institutions	468,601	571,531	125,802	125,802	117,559	117,559	456,016	454,536
Medical/Research	844,759	844,759	796,840	796,840	0	0	796,840	796,840
Military	139,661	139,661	142,562	142,562	137,242	137,242	137,886	137,886
Office	887,594	886,990	1,323,861	1,323,861	1,042,669	975,124	1,106,148	1,037,825
Residential	1,774,083	1,167,670	2,021,758	2,021,758	1,871,319	750,056	1,861,301	1,793,823
Retail	307,682	142,823	179,803	179,803	179,592	157,190	196,270	179,902
Warehouse	446,873	414,245	609,233	609,233	488,731	460,694	667,940	495,820
Totals	5,718,479	5,010,923	5,963,527	5,963,527	4,548,022	3,287,643	6,001,873	5,674,548

Note:

Assumes 171,140 square feet of new construction by 2000, and 221,240 by 2010 in Alternative A.

Assumes that 50,000 s.f. of Presidio-wide new construction occurs in the Institutions category, and 50,000 s.f. occurs in the Office category.

Source: National Park Service.

2. Public School Enrollment Estimates

According to the U.S. Department of Education, 844 dependents of Presidio military and civilian employees were enrolled in San Francisco Unified School District in the 1990-1991 school year (U.S. Department of Education 1994). According to the *Base Closure Final Environmental Impact Statement* (USACE 1991), approximately 3,000 dependents of Presidio employees lived within the five-county area (which includes San Francisco) in 1990.

School enrollment impacts for the San Francisco Unified School District due to children living in staff housing in the Presidio have been estimated for each of the four Presidio reuse alternatives, based on the assumption that certain Presidio housing units will be used as permanent residences by people employed at the Presidio and their families. It is also assumed that a limited number of housing units would be used by families of military personnel stationed in the San Francisco area. In each alternative, San Francisco Unified School District enrollment from Presidio school children would be less than the enrollment when the Presidio was in use by the military. Estimation of the number of Presidio school children required several steps, as follows.

First, it was assumed that the only Presidio housing which would potentially accommodate school aged children would be those residential housing units allocated to staff or military use. Housing used for guest accommodations or staff dormitory accommodations was assumed not to contribute to school enrollment. However, it should be recognized that some additional school enrollment may arise from a short-term population of visiting teachers or researchers at the Presidio who may occupy facilities considered guest accommodations for the purpose of this analysis.

The estimated number of school aged children present at the Presidio was derived by determining the proportion of school aged children who would be expected in a given residential population. Data from the U.S. Census for the nine-county Bay Area (counties of Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, and Sonoma) were used to determine the proportion of school aged (5 to 18 years) children within the total population. This proportion was then applied to the total permanent staff and military population estimated to be present in each reuse alternative to estimate the number of Presidio school aged children.

The next step involved accounting for school aged children who might not enroll in public school. This was accomplished by determining public school enrollment as a percentage of all school aged children present in San Francisco. These calculations were based on U.S. Census data, but only for San Francisco. This same percentage was applied to the total school aged children estimated for each alternative in order to estimate public school enrollment.

It should be noted that the San Francisco Unified School District may qualify for federal reimbursement for students enrolled within the District who are dependents of people living or working at the Presidio. The U.S. Department of Education administers the Federal Impact Aid program as a reimbursement to cover school costs for dependents of persons residing or working on federal property. Chapter V of this report estimates potential federal Impact Aid Program payments to the San Francisco Unified School District.

3. Presidio Employment Estimates

Under National Park Service management, the Presidio's buildings will house many different organizations and businesses. With a total building floor area ranging between 3.3 and 6.0 million square feet for the various alternatives, the reuse of the Presidio has the potential to replace many of the number of jobs which were present during the U.S. Army's tenure in the Presidio. If future tenants utilize Presidio space at intensities which are similar to national and local averages for the various types of facilities, the total Presidio employment could range from approximately 3,200 persons to 5,400 persons in 2010. This is in comparison to the estimated 1991 Presidio employment of about 5,600 persons (*Final EIS, Base Closure of the Presidio of San Francisco*, USACE 1991.) Only limited information is available at this time regarding the types of tenants which may occupy the available space and how they may utilize these spaces. Furthermore, a full market analysis has not been conducted in order to check assumptions regarding the absorption of space in the Presidio. Therefore, these estimates should be considered preliminary and subject to revision as more information becomes available regarding future Presidio tenants and market conditions.

The first step in estimating future Presidio employment was to determine the total space available for different types of land uses. The National Park Service Presidio Planning Team has developed total building area summaries for seven land use categories for each of the four Presidio reuse alternatives, as outlined below:

Dormitory. The Dormitory land use consists of overnight accommodations for park visitors and staff. The employment generated by this land use would be primarily housekeeping staff.

Industrial. The Industrial land use consists of various types of buildings which were formerly used by the Army for activities such as machine shops, repair shops, etc. Future uses of these buildings might include activities such as job skills training centers, building rehabilitation workshops, repair, and maintenance facilities. Employment in the industrial land use category is expected to consist primarily of skilled labor in various trades.

Institutions. The Institutions land use category encompasses various types of social and cultural-related uses including museums, educational facilities, interpretive centers, and other types of visitor facilities. Employment in this category would include Park Service staff, museum docents, and interpretive guides.

Medical/Research. The most significant component of the Medical/Research land use would be what is currently known as the Letterman complex. This complex consists of the Letterman Army Institute of Research (LAIR) and the Letterman Army Medical Center (LAMC). Future users of the facility are also expected to be involved in medical and research activities, and employment will include a range of occupations and professions, including researchers, technicians, administrators, and support staff.

Office. The Office land use will be one of the most prevalent land uses in the Presidio. Offices will be located in buildings of many different types, and will also house a variety of organizations, depending on the programmatic goals of the various reuse alternatives. Park tenant offices may house general business, public service outreach, governmental or administrative services. Employment in this land use category can be expected to range through all professional levels.

Retail. The retail land use will consist primarily of convenience shopping facilities for Presidio visitors, employees, and residents. Destination shopping facilities to serve San Francisco and the rest of the region are not proposed for the Presidio. Employment in this category will consist of food service workers, cashiers, managers, and other service-related positions.

Warehouse. Most activities in the warehouse land use category are expected to be of a very low intensity, oriented more towards long term storage of materials, rather than intensive distribution activities. Relatively little employment is expected to be generated in the Presidio's warehouse spaces. Employment in this category might include equipment operators and security guards. Note that some existing warehouses are included in other categories for future conditions due to projected changes in use.

Building area subtotals, developed by the Park Service for each land use category for each reuse alternative, indicate the amount of building space available to accommodate new employment (Table 2.1). This information was combined with an assumption of space absorption rates to estimate how much of the available space would be occupied in each of two different years, 2000 and 2010. For the purposes of this analysis, the total occupancy rate for each land use category was assumed to be 70 percent in 2000 and 90 percent in 2010. The 2010 occupancy assumptions represent stabilized occupancy, and therefore, present a "best case" assumption of potential Presidio employment. The same occupancy rates were assumed for the transportation analysis and in that case represent the "worst case" of potential traffic generation. Actual occupancy rates may vary, depending on the programmatic goals and market demand for each type of space.

The next step in the employment estimation process was to develop average employment density assumptions for each of the land use categories in the NPS building reuse summaries. The average employment density assumptions developed for use in this analysis are based on average employment density data published by the Institute of Traffic Engineers (ITE), in *Trip Generation*, 5th Ed. (ITE 1991) and the City of San Francisco Citywide Travel Behavior Survey (San Francisco City Planning Department 1993a). Table 2.2 contains a listing of the various Presidio building reuse categories, the assumed average employment density for each category, and the corresponding ITE land use code. In some cases, the average employment densities published in the ITE manual have been adjusted downward, due to expected differences in the utilization of space in the Presidio. The adjustments are explained in the table.

The area available for each land use was multiplied by the assumed occupancy rate to determine the occupied space for each land use in a given time period. The last step was to divide this amount by the assumed average employment density for each land use to obtain the total potential employment.

Table 2.2: Presidio Population and Employment Density Factors

RESIDENTIAL POPULATION DENSITIES (a)

<u>Land Use</u>	<u>Population Density</u>
Residential Housing Units	3.2 persons per unit
Staff Group Housing/Apartment Units	1 person per bed

EMPLOYMENT DENSITIES

<u>Land Use</u>	<u>Employment Density</u>	<u>ITE Code</u>
Industrial	750 square feet per employee	120- Adjusted upward from 550 square feet
Institutions	1,000 square feet per employee	n.a. - NPS estimate
Medical/Research	550 square feet per employee	610- Adjusted upward from 350 square feet based on CTBS data
Office	385 square feet per employee	750- Adjusted upward from 275 square feet based on CTBS data
Retail	500 square feet per employee	n.a.
Warehouse	5,000 square feet per employee	150- Adjusted upward from 750 square feet
Dormitory	0.125 employees per bed	n.a.

Note:

(a) Appendix D shows occupancy assumptions for guest lodging facilities.

Sources: Institute of Transportation Engineers; National Park Service; Robert Peccia & Associates; City of San Francisco Citywide Travel Behavior Survey, 1993; Bay Area Economics.

B. Impacts

This section details the results of the population, employment, and public school enrollment impact analysis for each of the four Presidio reuse alternatives. The section is arranged into four sub-sections; one for each of the four reuse alternatives.

1. Alternative A

a) Population Impacts

Following are descriptions of the population impacts of the proposed project. These population impacts distinguish between staff and visitors, and residential space versus apartment/group housing space. Table 2.3 shows total availability of residential units and dorm units under each of the Presidio reuse alternatives and calculates the total residential populations which would be accommodated in the Presidio. Approximately 4,700 people lived within the Presidio in 1990.

In this alternative, approximately 3,400 residents and 390 overnight guests would populate the Presidio on a daily basis in year 2000. By the year 2010, substantial numbers of housing units would be removed, decreasing the resident population to about 2,000. The guest population would increase to approximately 720 guests on a given night in the year 2010. The increase in overnight visitor population is due to an expected increase in the number of dormitory/group housing beds in service for guest use between 2000 and 2010, combined with an increase in the expected guest lodging occupancy rates.

b) Public School Enrollment Impacts

The total permanent household population (including staff and military families) of the Presidio would be approximately 3,000 persons in the year 2000 and 1,600 persons in 2010. These residential populations are estimated to result in enrollment of about 380 and 200 children in public schools, respectively. The results of the public school enrollment estimates for each of the four reuse alternatives are shown in Table 2.4. In the year 2000, the estimated Presidio enrollment impact would be approximately 0.59 percent of the 1990 S.F. Unified School District enrollment of 65,078 students (about 845 were dependents of uniformed and civilian military employees). This would drop to 0.31 percent by 2010 due to a reduction in occupied Presidio housing units. The year 2000 enrollment would be equal to 46 percent of the number Presidio employee dependents enrolled in San Francisco public schools in 1990. This figure would drop to 24 percent by 2010.

Table 2.3: Presidio Population Estimates

Alternative A	Year 2000		Year 2010	
	Units	Occupants	Units	Occupants
Residential Units Occupied by Staff (a)	952	3,046	504	1,613
Guest Residential Units (b)	81	152	81	249
	Beds	Occupants	Beds	Occupants
Dormitory/Apt. Beds Occupied by Staff (c)	384	384	384	384
Guest Dorm/Conf. Ctr./Apt./Guest House Beds (d)	554	239	610	471
Total Residents		3,430		1,997
Total Guests		391		720

Alternative B	Units		Occupants	
	Units	Occupants	Units	Occupants
Residential Units Occupied by Staff (a)	1,142	3,654	1,142	3,654
Guest Residential Units (b)	39	94	39	144
	Beds	Occupants	Beds	Occupants
Dormitory/Apt. Beds Occupied by Staff (c)	634	634	634	634
Guest Dorm/Conf. Ctr./Apt./Guest House Beds (d)	75	48	75	74
Total Residents		4,288		4,288
Total Guests		142		218

Alternative C	Units		Occupants	
	Units	Occupants	Units	Occupants
Residential Units Occupied by Staff (a)	1,025	3,280	253	810
Guest Residential Units (b)	54	130	54	183
	Beds	Occupants	Beds	Occupants
Dormitory/Apt. Beds Occupied by Staff (c)	205	205	205	205
Guest Dorm/Conf. Ctr./Apt./Guest House Beds (d)	344	220	344	310
Total Residents		3,485		1,015
Total Guests		350		492

Alternative D	Units		Occupants	
	Units	Occupants	Units	Occupants
Residential Units Occupied by Staff (a)	1,059	3,389	1,004	3,213
Guest Residential Units (b)	81	152	96	243
	Beds	Occupants	Beds	Occupants
Dormitory/Apt. Beds Occupied by Staff (c)	255	255	255	255
Guest Dorm/Conf. Ctr./Apt./Guest House Beds (d)	664	214	664	551
Total Residents		3,644		3,468
Total Guests		365		794

Notes:

(a) Population density for staff housing units: 3.2 persons per unit. Assumes staff units are fully occupied. Staff housing units from Table 9.3, includes NPS/Partner Staff units and Military units.

(b) Figures in this table for Alternative A, year 2010 assume that 15 Kobbé Ave. housing units are used for guest dormitory accommodations, yielding an increase of 56 beds in the guest dormitory category, and a 15 unit reduction in the guest housing unit category. In Tables 9.2 and 9.3 this residential space is accounted for in the guest housing units category.

(c) Assumes that staff dorm beds are fully occupied, one person per bed.

(d) Available guest beds from Table 9.4. Guest Population figures are based on lodging occupancy rates shown in Appendix C, and the total guest capacities shown in Appendix D. As shown in Appendix D, figures allow for some double-occupancy of rooms.

Sources: National Park Service, Bay Area Economics.

Table 2.4: Presidio Public School Enrollment Estimates**Estimate of proportion school aged children (5 to 18 years) living in family residential units.**

This analysis assumes that the percentage of school aged children of the Presidio residential population will be equal to the percentage of school aged children in the 9-county Bay Area.

1990 Bay Area Population (a)	6,023,577
1990 School Aged Children	1,035,468
Percentage School Aged Children	17.19%

Estimate of number of school aged children present in Presidio by applying ratio from above.

	Alt. A		Alt. B		Alt. C		Alt. D	
	2000	2010	2000	2010	2000	2010	2000	2010
Presidio Household Population(b)	3,046	1,613	3,654	3,654	3,280	810	3,389	3,213
School Aged Population	524	277	628	628	564	139	583	552

Estimate of proportion of school aged children in San Francisco who enroll in public elementary or high school.

1990 San Francisco School Aged Children	88,709
1990 San Francisco School Aged Children Enrolled in Public Elementary or High School	65,078
Percentage Enrolled In Public School	73.36%

Estimate of number of Presidio resident children enrolled in San Francisco public schools.

	Alt. A		Alt. B		Alt. C		Alt. D	
	2000	2010	2000	2010	2000	2010	2000	2010
Presidio Public Elementary and High School Enrollment	384	203	461	461	414	102	427	405

Notes:

(a) Includes Alameda, Contra Costa, Marin, San Francisco, Solano, Napa, Santa Clara, Sonoma, and San Mateo counties.

(b) From Table 2.3 Includes only the population living in residential units occupied by staff.

Sources: National Park Service, U.S. Bureau of the Census, Association of Bay Area Governments, U.S. Department of Education, Bay Area Economics.

Table 2.5: Presidio Employment Generating Land Uses and Employment Estimates

Alternative A	Building Space		Estimated Employment	
	Year 2000	Year 2010	Year 2000	Year 2010
Dormitory	448,727	484,792	82	106
Industrial	322,204	312,299	301	375
Institutions	468,601	571,531	328	514
Medical/Research	844,759	844,759	1,075	1,382
Office	887,594	886,990	1,614	2,073
Retail	307,682	142,823	431	257
Warehouse	446,873	414,245	63	75
Total	3,726,440	3,657,439	3,894	4,782
Alternative B				
Dormitory	340,551	340,551	62	80
Industrial	342,949	342,949	320	412
Institutions	125,802	125,802	88	113
Medical/Research	796,840	796,840	1,014	1,304
Office	1,323,861	1,323,861	2,407	3,095
Retail	179,803	179,803	252	324
Warehouse	609,233	609,233	85	110
Total	3,719,039	3,719,039	4,228	5,438
Alternative C				
Dormitory	342,108	342,108	48	62
Industrial	322,459	301,352	301	362
Institutions	117,559	117,559	82	106
Medical/Research	0	0	0	0
Office	1,042,669	975,124	1,896	2,280
Retail	179,592	157,190	251	283
Warehouse	488,731	460,694	68	83
Total	2,493,118	2,354,027	2,646	3,176
Alternative D				
Dormitory	369,952	369,952	80	103
Industrial	362,323	360,767	338	433
Institutions	456,016	454,536	319	409
Medical/Research	796,840	796,840	1,014	1,304
Office	1,106,148	1,037,825	2,011	2,426
Retail	196,270	179,902	275	324
Warehouse	667,940	495,820	94	89
Total	3,955,489	3,695,642	4,131	5,088

Notes:**Employment Density (From Table 2.2)**

Dormitory	0.125 employees per bed, guest bed statistics from Table 9.2
Industrial	750 square feet per employee
Institutions	1,000 square feet per employee
Medical/Research	550 square feet per employee
Office	385 square feet per employee
Retail	500 square feet per employee
Warehouse	5,000 square feet per employee

Assumes overall occupancy rate of 70% for year 2000 for each land use type.
 Assumes overall occupancy rate of 90% for year 2010 for each land use type.

Sources: National Park Service; Institute of Transportation Engineers; Robert Peccia & Associates;
 Bay Area Economics.

c) Employment Impacts

Under Alternative A, the total employment-generating building space available in the Presidio would be just over 3.7 million square feet in year 2000, and would drop to just under 3.7 million square feet by 2010, when interim uses would cease. See Table 2.5.

In the year 2010, total potential employment in the Presidio would be approximately 4,800 persons, approximately 86 percent of the 5,600 Presidio jobs estimated by the Army in the *Base Closure EIS*. The greatest proportion of Presidio employment would be in the Office land use category, where there would be almost 2,100 employees. The next most significant land use category would be Medical/Research, with about 1,400 employees. With the exception of Institutions, all other employment categories would have fewer than 500 employees.

2. Alternative B

a) Population Impacts

Alternative B is different from Alternative A in that the population would not decline between 2000 and 2010. Essentially all of the space that would be present in 2000 would remain, and the residential population would remain at approximately 4,300 persons. The average daily overnight guest population is estimated to be approximately 140 persons in 2000, increasing to approximately 220 per night in 2010. This increase is due to expected increases in occupancy rates for guest facilities.

b) Public School Enrollment Impacts

In total, it is estimated that about 460 Presidio residents would enroll in public schools under this alternative. For Alternative B, the estimated public school enrollment is the same for both the year 2000 and the year 2010, since there is no change in the amount of available family housing in the intervening period. In the years 2000 and 2010, the estimated Presidio enrollment impact would be approximately 0.70 percent of the 1990 S.F. Unified School District enrollment of 65,078 students. The enrollment would be equal to 54 percent of the number Presidio employee dependents enrolled in San Francisco public schools in 1990.

c) Employment Impacts

Of the four alternatives, Alternative B would generate the most Presidio employment. By the year 2010, the Presidio employment base would be approximately 5,400 people. As in Alternative A, the largest amount of employment would be in the Office and Medical/Research land uses, with several hundred Industrial and Retail jobs, and approximately 100 jobs each in Dormitory, Institutions, and Warehouse. A notable difference between this alternative and Alternative A is that this alternative has almost 3,100 jobs in the office category, as opposed to about 2,400 jobs in this category for Alternative A Office employment. Although the amount of available building space would not change in Alternative B during the 2000 to 2010 time period, employment is assumed to increase due to an increase in overall building occupancy from 70 to 90 percent.

3. Alternative C

a) Population Impacts

Alternative C would have a year 2000 resident population of about 3,500 persons. This population would be sharply reduced between 2000 and 2010, declining to just over 1,000 residents in 2010. The overnight guest population would be approximately 350 per night in 2000, increasing to approximately 490 per night in 2010.

b) Public School Enrollment Impacts

Under Alternative C, there would be a large drop in the number of available family housing units in the Presidio between 2000 and 2010. Due to this reduction in housing, the estimated number of Presidio children enrolled in public schools drops from about 410 in the year 2000 to about 100 in the year 2010. In the year 2000, the estimated Presidio enrollment impact would be approximately 0.62 percent of the 1990 San Francisco Unified School District enrollment of 65,078 students. This would drop to 0.14 percent by 2010 due to a reduction in occupied Presidio housing units. The year 2000 enrollment would be equal to 48 percent of the number Presidio employee dependents enrolled in San Francisco public schools in 1990. This figure would drop to 11 percent by 2010.

c) Employment Impacts

Employment shown within the Presidio for Alternative C is substantially lower than the employment in the other three alternatives due to the definition of this alternative. Under Alternative C, the Letterman complex (LAIR and LAMC) would be excised from the park boundaries. Therefore, while the Medical/Research land use for this alternative shows zero space and zero employment, this space will actually exist outside the park boundaries. Within the park boundaries, total employment in 2010 would be approximately 3,200 persons, increasing from approximately 2,600 jobs in 2000. The office land use would generate over 70 percent of the employment in this alternative; about 2,300 jobs in 2010. In terms of employment generation, Industrial and Retail would be the next two most significant land uses, with about 360 and 280 jobs, respectively. The projected increase in employment between 2000 and 2010 is due to expected increases in Presidio occupancy.

4. Alternative D

a) Population Impacts

This alternative is similar to Alternative B, in that the resident population is not expected to change dramatically between 2000 and 2010 due to removal of housing units. The resident population would drop slightly from approximately 3,600 in 2000 to about 3,500 in 2010. The overnight guest population would be approximately 370 persons in 2000 and approximately 790 in 2010. The increase in overnight guest population is due to an expected increase in the number of beds in service for guest use between 2000 and 2010, combined with expected increases in occupancy rates.

b) Public School Enrollment Impacts

Under Alternative D, Presidio public school enrollment would be approximately 430 students in 2000 and about 410 in 2010. The slight reduction in 2010 is due to a

reduction in the number of housing units available for Presidio staff. In the year 2000, the estimated Presidio enrollment impact would be approximately 0.65 percent of the 1990 San Francisco Unified School District enrollment of 65,078 students. This would drop to 0.63 percent by 2010 due to a reduction in occupied Presidio housing units. The year 2000 enrollment would be equal to 50 percent of the number Presidio employee dependents enrolled in San Francisco public schools in 1990. This figure would drop slightly to 49 percent by 2010.

c) Employment Impacts

After Alternative B, Alternative D would have the second largest year 2010 employment of the four Presidio reuse alternatives. Total employment would be 4,100 persons in year 2000, increasing to 5,100 in year 2010. As in Alternatives A and B, the majority of jobs would be in the Medical/Research and Office sectors.

III. PRESIDIO PAYROLL

A. Methodology

Under National Park Service management, the Presidio will contain many different organizations employing substantial numbers of Bay Area residents. This employment will translate into income, which will in turn, contribute to the Bay Area economy. Based on the employment estimates discussed in the previous section, total payroll in the Presidio could potentially range between \$76 million and \$141 million per year when the Presidio reaches stabilized occupancy in year 2010. It should be noted that because these payroll estimates are based on the employment estimates described in the previous section, the payroll estimates must also be taken as preliminary indicators of future Presidio conditions, subject to revision as more detailed information becomes available.

To estimate total Presidio payroll from the number of jobs estimated for each Presidio reuse alternative, assumptions about average annual wages in each land use category were used. The analysis used estimated annual wages for jobs in various land uses developed by the San Francisco City Planning Department using 1992 data from the California Employment Development Department (San Francisco City Planning Department 1993b).

Table 3.1 shows each Presidio land use category, estimated annual employee wages, and explanations of the types of employment included in each category. In reality, each land use will have employees who fall into a range of occupational classifications, i.e., managers, clerical workers, technicians, etc. Therefore, these average annual wage estimates can only provide a rough estimate of the Presidio payroll for each reuse alternative. Generally speaking, the land uses with a preponderance of professional and technical employment are expected to have the highest average wages. The Retail and Dormitory land uses can be expected to have fewer skilled workers, and more part-time entry-level workers who will generally be paid lower wages.

To estimate total Presidio payroll for a given period, the analysis multiplies the number of jobs in each category by the corresponding annual wage levels. Because these calculations are based on the total Presidio employment, they do not differentiate payroll impacts that are new to the San Francisco Bay Area region from payroll impacts that could occur as a result of relocation of jobs from within the region. Chapter IV contains estimates of Presidio employment and payroll that would represent jobs and income new to the San Francisco Bay Area region.

Table 3.1: Estimated Average Annual Salaries for Presidio Employment

Land Use	Estimated Annual Wage S.F. County	Comments
Industrial	\$36,188	Based on wages in land uses including warehouses, factories, workshops, showrooms, and port facilities.
Institutions	\$28,237	Based on wages in land uses including theaters, museums, nightclubs, hospitals, libraries, schools, and churches.
Medical	\$32,943	Based on wages in Health Services sector as a whole.
Office	\$21,988	Based on wages in Membership Organizations sector.
Retail	\$19,186	Based on wages in land uses including stores, restaurants, bars, and commercial parking lots.
Warehouse	\$36,188	Same as Industrial; warehouse wages included in data for Industrial land use, above.
Dormitory	\$20,536	Based on wages in Hotels and other lodging places.

Sources: State of California, Employment Development Department, 1992, compiled by San Francisco City Planning Department, 1993.

B. Impacts

This section details the results of the payroll impact analysis for each of the four Presidio reuse alternatives. The impacts identified in this section are limited to the direct payroll impacts which would be created within the Park itself. The section is arranged into four sub-sections; one for each of the four reuse alternatives.

1. Alternative A

Table 3.2 provides estimates for future Presidio payrolls under each proposed alternative. These estimates were derived by multiplying total employment for each land use by the annual average payroll for the years 2000 and 2010. Total Presidio payroll would reach approximately \$129 million dollars in the year 2010 under Alternative A, increasing from the year 2000 total of \$103 million due to increasing occupancy of employment-generating space between 2000 and 2010. The 2010 payroll estimate represents an increase of about \$52 million per year over the combined civilian and military payroll estimated for Presidio operations in the 1991 Presidio base closure EIS (USACE 1991).

The relative distributions of total wages paid by each land use category generally follow the employment distributions; however, the importance of the large numbers of medical/research workers is magnified in the payroll data, since these workers, on average, are expected to be among the highest paid in the Presidio. These same patterns hold true for Alternatives B and D, as well.

2. Alternative B

Of the four alternatives, Alternative B would have the highest potential payroll, estimated to be approximately \$141 million in 2010. As in Alternative A, the most important sectors in terms of total payroll value are Medical/Research and Office. The potential payroll for this alternative is approximately \$64 million greater than the payroll reported in the Presidio base closure EIS.

3. Alternative C

As mentioned in the section discussing employment impacts, this alternative would have fewer jobs actually located in the Presidio boundaries, with the Letterman complex located outside of the park. For this reason, total payroll within the park would be substantially less than in the other three alternatives, totaling approximately \$63 million in 2000 and \$76 million in 2010. Approximately two-thirds of the total 2010 payroll for this Alternative would be in the Office sector. The year 2010 payroll would be just under the payroll reported in the Presidio base closure EIS.

4. Alternative D

Alternative D would generate the second largest total payroll of the four Alternatives, behind Alternative B. In 2000, total Presidio payroll would be about \$109 million. This would increase to \$135 million in 2010, exceeding the payroll reported in the base closure EIS by \$58 million.

Table 3.2: Estimated Presidio Payroll

	Payroll	
	Year 2000	Year 2010
Alternative A		
Dormitory	\$1,683,952	\$2,176,816
Industrial	\$10,892,588	\$13,570,500
Institutions	\$9,261,736	\$14,513,818
Medical/Research	\$35,413,725	\$45,527,226
Office	\$35,488,632	\$45,581,124
Retail	\$8,269,166	\$4,930,802
Warehouse	\$2,279,844	\$2,714,100
Total	\$103,289,643	\$129,014,386
Alternative B		
Dormitory	\$1,273,232	\$1,642,880
Industrial	\$11,580,160	\$14,909,456
Institutions	\$2,484,856	\$3,190,781
Medical/Research	\$33,404,202	\$42,957,672
Office	\$52,925,116	\$68,052,860
Retail	\$4,834,872	\$6,216,264
Warehouse	\$3,075,980	\$3,980,680
Total	\$109,578,418	\$140,950,593
Alternative C		
Dormitory	\$985,728	\$1,273,232
Industrial	\$10,892,588	\$13,100,056
Institutions	\$2,315,434	\$2,993,122
Medical/Research	\$0	\$0
Office	\$41,689,248	\$50,132,640
Retail	\$4,815,686	\$5,429,638
Warehouse	\$2,460,784	\$3,003,604
Total	\$63,159,468	\$75,932,292
Alternative D		
Dormitory	\$1,642,880	\$2,115,208
Industrial	\$12,231,544	\$15,669,404
Institutions	\$9,007,603	\$11,548,933
Medical/Research	\$33,404,202	\$42,957,672
Office	\$44,217,868	\$53,342,888
Retail	\$5,276,150	\$6,216,264
Warehouse	\$3,401,672	\$3,220,732
Total	\$109,181,919	\$135,071,101

Notes:

Assumed Wage Levels (See Table 3.1):

Use	Average Annual Wages
Dormitory	\$20,536 per year
Industrial	\$36,188 per year
Institutions	\$28,237 per year
Medical	\$32,943 per year
Office	\$21,988 per year
Retail	\$19,186 per year
Warehouse	\$36,188 per year

Assumes overall Presidio occupancy rate of 70 percent for year 2000 and 90 percent for year 2010.

Sources: National Park Service; Robert Peccia & Associates; U.S. Census Bureau, County Business Patterns 1989; U.S. Bureau of Labor Statistics; Bay Area Economics.

IV. POTENTIAL NEW BAY AREA ECONOMIC IMPACTS

The planning alternatives for reuse of the Presidio have the potential to generate jobs and increase household income in the Bay Area region and in the City of San Francisco. Some of these jobs will be generated at the Presidio, as described in Chapter II of this report and as summarized below. These jobs, and associated payroll, are direct economic benefits resulting from Presidio reuse. The Presidio reuse will also generate additional jobs and payroll in the surrounding region; these effects are characterized as secondary economic benefits.

A. Methodology

This chapter provides estimates of total (direct and secondary) economic benefits of Presidio activities in the region. These total economic benefits are estimated using input-output multipliers adopted from a recent analysis of the Bay Area economy (ABAG 1991).

The estimates are presented in five segments. The first segment summarizes the direct employment and payroll benefits from new jobs at the Presidio and the methodology used to transform direct benefits into total (direct and secondary) benefits. The second segment presents estimates of the total (direct and secondary) economic benefits in the region resulting from reuse of the Presidio. The third segment compares total employment and earnings impacts of the four Presidio planning alternatives. The fourth segment contrasts employment and income gained from Presidio reuse with employment and earnings lost from Presidio military closure. The fifth segment indicates the employment and payroll benefits resulting from construction activities at the Presidio.

To avoid overestimating the impacts of Presidio employment on the regional economy, it was necessary to estimate the proportion of Presidio jobs that will be new to the region, as opposed to those that will be relocated to the Presidio from elsewhere within the region. This is because jobs that will be new to the region increase employment opportunities and spending, while jobs transferred from within the region do not. Estimates of Presidio jobs that will be new to the region are given for each of seven different land use categories - dormitory, industrial, institutional, medical/research, office, and warehousing - expected to locate at the Presidio.

Dormitory. The Presidio's dormitory land uses will create new jobs in the hospitality industry. The new dormitory employment will be related to either staff or guest lodging uses. Most of the jobs will be new since the dormitory uses will be in support of activities which are tied specifically to the Presidio location, e.g., staff lodging for Presidio employees, or guest lodging for people visiting the Presidio. It is not expected that operators of Presidio dormitory space will relocate dormitory operations from other locations; however, according to research conducted by Bay Area Economics, some conference center clients might shift some of their conference center patronage from existing conference facilities in the region to proposed Presidio conference facilities. This could cause some existing conference center operators to reduce staff unless they could attract new clientele to replace business lost to the Presidio. Based on these assumptions, the analysis assumes that 80 percent of jobs in the dormitory category will be new jobs.

Industrial. The analysis assumes that 50 percent of Presidio employment in this sector will be new to the region. New industrial jobs may be created either through expansion of local organizations or attraction of organizations that are entirely new to the region.

Institutional. Institutional uses in the Presidio include museums, interpretative centers, churches, and public safety buildings. Most of these uses will be unique to the Presidio location, e.g., interpretive center for Crissy Field, and will not represent activities that will be transferred from other locations in the region. The analysis assumes that 70 percent of the jobs in the Institutions sector will be new to the region.

Medical and Research. The Presidio GMPA assumes that the Presidio's Medical/Research facilities will be used either by a local medical organization that needs to expand or by an organization that is moving to the region. The analysis assumes that 80 percent of the Presidio's Medical/Research employment will be new to the region.

Office. The response to the Presidio's "Call for Interest" indicates that Presidio office space occupants will include some local tenants that want to move but not expand, some local tenants that need to expand, and some tenants that are new to the Bay Area. The analysis assumes that 60 percent of Presidio office employment will be new to the region.

Warehouse. Most of the Presidio's warehouse facilities are expected to be used for storage by tenants using other types of space in the Presidio. For example, a museum tenant in the Institutional land use category might require warehouse space for materials that are not on display. The analysis assumes that 50 percent of Presidio warehouse employment will be new to the region, and 50 percent could be relocated from other parts of the region.

Retail. Most of the retail land use proposed for the Presidio will represent concession opportunities that are new to the region because they arise from Presidio visitor expenditures which are new to the region. The analysis assumes that 90 percent of the Presidio's retail employment will be new to the region.

These assumptions were used to refine estimates of total Presidio employment and payroll into estimates of Presidio employment and payroll new to the region, as shown in Table 4.1.

After identifying those jobs from each alternative that are new to the region, input-output analysis is used to estimate the total impact of Presidio reuse activities on the regional economy. With this analysis, employment and earnings changes at the Presidio are multiplied by input-output multipliers appropriate for the kinds of jobs anticipated at the Presidio to estimate the total impacts (direct and secondary) of Presidio activities on the County and regional economies.

The Park Service made a separate estimate of the construction expenditures anticipated under each alternative. The analysis converts these expenditure estimates into estimates of construction jobs by assuming 20.4 jobs created per million dollars in construction expenditures. The analysis estimates the income from construction using the assumption that each dollar in construction expenditures generates \$0.562 in income (ABAG 1991).

Table 4.1: Direct Employment and Payroll Expenditures New to S.F. Bay Area

Employment New to S.F. Bay Area	Alternative A		Alternative B		Alternative C		Alternative D	
	2000	2010	2000	2010	2000	2010	2000	2010
Dormitory	66	85	50	64	38	50	64	82
Industrial	151	188	160	206	151	181	169	217
Institutions	230	360	62	79	57	74	223	286
Medical	860	1,106	811	1,043	0	0	811	1,043
Office	968	1,244	1,444	1,857	1,138	1,368	1,207	1,456
Retail	388	231	227	292	226	255	248	292
Warehouse	32	38	43	55	34	42	47	45
Total Operations	2,694	3,250	2,796	3,596	1,644	1,969	2,769	3,420

Earnings (\$ thousands)	Alternative A		Alternative B		Alternative C		Alternative D	
	2000	2010	2000	2010	2000	2010	2000	2010
Dormitory	1,347	1,741	1,019	1,314	789	1,019	1,314	1,692
Industrial	5,446	6,785	5,790	7,455	5,446	6,550	6,116	7,835
Institutions	6,483	10,160	1,739	2,234	1,621	2,095	6,305	8,084
Medical	28,331	36,422	26,723	34,366	0	0	26,723	34,366
Office	21,293	27,349	31,755	40,832	25,014	30,080	26,531	32,006
Retail	7,442	4,438	4,351	5,595	4,334	4,887	4,749	5,595
Warehouse	1,140	1,357	1,538	1,990	1,230	1,502	1,701	1,610
Total Operations	\$71,483	\$88,252	\$72,916	\$93,785	\$38,434	\$46,132	\$73,439	\$91,188

Notes:

- (a) Construction payroll estimated assuming \$.562 income per dollar expenditures. Expenditures assumed distributed evenly over sixteen year period.
- (b) Figures are based on total employment and wage information from Tables 2.5 and 3.2, adjusted as discussed in text.

Sources: National Park Service, Bay Area Economics.

B. Impacts

As explained in Chapters II and III, direct employment and payroll benefits of Presidio reuse were estimated from the expected building space available under each land use alternative, the employee population expected to use that space, and those employees' estimated salaries. Total employment at the Presidio is shown in Table 2.5. Total Presidio payroll is presented in Table 3.2. Based on the assumptions discussed above, Table 4.1 summarizes the estimates of Presidio employment and income that would be new to the region under each of the four Presidio reuse alternatives.

1. Bay Area Input-Output Multipliers

The Association of Bay Area Governments recently completed an input-output study of the Bay Area economy (ABAG 1991). This study focused upon detailed accounts of money flows between thirty-eight different sectors of the Bay Area economy. This study provides measures of the total increase in jobs and payroll in the region generated by the direct increase in jobs or payroll in one enterprise in the region, such as in the Presidio. These measures are termed regional "multipliers."

Seven sectors in the Bay Area study were chosen to represent the seven businesses sectors expected at the Presidio (Table 4.2). The ABAG model provides two types of multipliers for each sector - a larger (type II) multiplier and a smaller (type I) multiplier. In theory, type II multipliers are used to estimate impacts from new jobs in a closed economy, in which all payroll is spent inside the region. In theory, type I multipliers are used to estimate impacts from new jobs in an open economy, in which all payroll is spent outside the region.

In practice, some payroll will probably be spent outside and some will be spent within the Bay Area. Accordingly, this analysis uses multipliers that represent the mid-point between the type I multiplier and the direct impact to estimate the impact of Presidio reuse within San Francisco County. To estimate the impact of Presidio reuse on the regional economy, the analysis uses multipliers that represent the mid-point between type I and type II multipliers. These assumptions are based on the ABAG input-output study documentation (ABAG 1991) and discussions with ABAG staff (personal communication, August 1993 and May 1994).

The regional and county multipliers used to estimate economic impacts in this section are presented in Table 4.2. A comparison of the regional and county multipliers suggests that approximately 70 percent of the total regional economic impact from Presidio employment that is new to the region will be felt in San Francisco itself.

Table 4.2: Multipliers Used to Estimate Direct and Secondary Employment and Earnings Impacts

Payroll Sector	Sector # (a)	San Francisco Bay Area		San Francisco County	
		Employment (b)	Earnings	Employment	Earnings
Dormitory	32	2.13	3.57	1.57	2.28
Industrial	24	2.96	2.67	1.98	1.84
Institutions	35	2.33	3.70	1.67	2.35
Medical	36	2.12	2.65	1.56	1.82
Office	37	1.59	2.71	1.30	1.86
Retail	30	1.85	2.36	1.43	1.68
Warehouse	26	3.53	2.81	2.27	1.91
Construction	6	2.30	2.77	1.65	1.89

Notes:

(a) Sector chosen in ABAG model which most closely approximates the sectors anticipated in the Presidio.

(b) Economic Multipliers for the San Francisco Bay Area. 1991 Following suggestion of ABAG representative, regional multipliers equal the average of type I and Type II multipliers. San Francisco County multipliers equal the average of one plus the type I multiplier.

Source: Association of Bay Area Governments.

2. Direct and Indirect Impacts of Presidio Reuse

The new income and employment impacts of each business type are estimated by applying the appropriate multiplier for a specific business (Table 4.2) to the number of jobs and payroll dollars for a particular land use at the Presidio that will be new to the region (Table 4.1). The resulting estimates of regional earnings and employment relating for each sector are shown in Tables 4.3a and 4.3b. Separate estimates are provided for each of the four planning alternatives at the Presidio for the years 2000 and 2010. Table 4.3a shows impacts to the Bay Area and Table 4.3b shows impacts within San Francisco County.

The estimates presented in Tables 4.3a and 4.3b emphasize the relative impact of office-related and medical-related business at the Presidio for generating jobs and income in the region. The numbers also suggest the relatively smaller economic impact of the industrial and institutional land uses and the significantly smaller impact of the retail, warehouse and dormitory business activities for jobs and income generation in the San Francisco and regional economies.

Office-related business at the Presidio is expected to account for roughly half the new jobs and income generated in the Bay Area and the City of San Francisco for all years and planning alternatives covered. Under Alternative A for the year 2000, office activities are estimated to generate 1,500 new jobs and \$58 million in new earnings in the Bay Area with approximately 1,300 jobs and \$39 million earnings in San Francisco alone. By 2010, employment and income in the Office land use category is expected to increase. In the region, there would be approximately 2,000 new jobs in the Office land use category, generating new income of approximately \$74 million. The year 2010 impact in San Francisco would be approximately 1,600 of these Office jobs, with an estimated payroll of \$51 million.

Medical-related business at the Presidio is estimated to generate slightly less than a fifth of the new jobs and income generated in the Bay Area and the City for Alternative A and slightly less than a third of the new jobs and income generated in the Bay Area and the City for alternatives B and D. (No medical related business is planned for Alternative C.) Under Alternative A for the year 2000, medical related business is expected to generate 1,800 new jobs and \$75 million in new income in the Bay Area, including 1,300 new jobs and \$52 million in new earnings in San Francisco. By 2010, new regional medical activity would increase to 2,300 jobs and \$96 million in payroll, while the impact in San Francisco would be 1,700 new jobs and \$66 million in payroll.

Under Alternative A, new industrial business is expected to generate about 450 jobs in the Bay Area and approximately \$15 million in payroll in the year 2000. The number of new Industrial jobs would increase to about 550 and the income generated would increase to about \$18 million by the year 2010. New Industrial business is expected to generate about the same number of jobs and income in Alternative C, and somewhat more jobs and payroll for other alternatives. The institutional sector, under Alternative A in the year 2010, is expected to generate about 840 new jobs and \$38 million in payroll for the Bay Area. This same sector would generate about 670 new jobs and \$30 million in income in Alternative D. The institutional sector will generate significantly fewer new jobs and income in the region for Alternatives B and C.

Table 4.3.a: Total (Direct Plus Secondary) Employment and Payroll Impacts New to the Bay Area Region**Employment and Payroll Impacts in Bay Area Region (a)**

Employment	Alternative A		Alternative B		Alternative C		Alternative D	
	2000	2010	2000	2010	2000	2010	2000	2010
Dormitory	140	181	106	136	82	106	136	176
Industrial	445	554	473	609	445	535	499	640
Institutions	535	838	144	184	134	173	520	667
Medical	1,823	2,344	1,720	2,212	0	0	1,720	2,212
Office	1,540	1,978	2,296	2,953	1,809	2,175	1,918	2,314
Retail	718	428	420	539	418	471	458	539
Warehouse	111	132	150	194	120	146	166	157
Total Operations	5,311	6,455	5,308	6,827	3,007	3,606	5,418	6,705

Payroll Impacts

Dormitory	\$4,803	\$6,208	\$3,631	\$4,685	\$2,811	\$3,631	\$4,685	\$6,033
Industrial	\$14,542	\$18,117	\$15,460	\$19,904	\$14,542	\$17,489	\$16,329	\$20,919
Institutions	\$23,955	\$37,540	\$6,427	\$8,253	\$5,989	\$7,742	\$23,298	\$29,871
Medical	\$74,935	\$96,336	\$70,683	\$90,898	\$0	\$0	\$70,683	\$90,898
Office	\$57,705	\$74,115	\$86,056	\$110,654	\$67,787	\$81,516	\$71,898	\$86,736
Retail	\$17,564	\$10,473	\$10,269	\$13,203	\$10,229	\$11,533	\$11,207	\$13,203
Warehouse	\$3,203	\$3,813	\$4,322	\$5,593	\$3,457	\$4,220	\$4,779	\$4,525
Total Operations	\$196,707	\$246,602	\$196,848	\$253,191	\$104,814	\$126,130	\$202,880	\$252,185

Note:

(a) This table excludes impacts of jobs and payroll relocated to Presidio from elsewhere in the region.

Table 4.3.b: Total (Direct Plus Secondary) Employment and Payroll Impacts New to San Francisco County**Employment and Payroll Impacts in San Francisco County (a)**

Employment	Alternative A		Alternative B		Alternative C		Alternative D	
	2000	2010	2000	2010	2000	2010	2000	2010
Dormitory	103	133	78	100	60	78	100	129
Industrial	298	371	316	407	298	358	334	428
Institutions	382	599	103	132	96	124	372	477
Medical	1,342	1,725	1,265	1,627	0	0	1,265	1,627
Office	1,254	1,611	1,870	2,405	1,473	1,772	1,563	1,885
Retail	553	330	323	416	322	363	353	416
Warehouse	71	85	96	125	77	94	106	101
Total Operations	4,002	4,853	4,052	5,212	2,325	2,788	4,093	5,062
Payroll								
Dormitory	\$3,075	\$3,975	\$2,325	\$3,000	\$1,800	\$2,325	\$3,000	\$3,862
Industrial	\$9,994	\$12,451	\$10,625	\$13,679	\$9,994	\$12,019	\$11,222	\$14,377
Institutions	\$15,219	\$23,850	\$4,083	\$5,243	\$3,805	\$4,918	\$14,802	\$18,978
Medical	\$51,633	\$66,379	\$48,703	\$62,632	\$0	\$0	\$48,703	\$62,632
Office	\$39,499	\$50,732	\$58,906	\$75,743	\$46,400	\$55,798	\$49,214	\$59,371
Retail	\$12,503	\$7,455	\$7,310	\$9,399	\$7,281	\$8,210	\$7,978	\$9,399
Warehouse	\$2,172	\$2,585	\$2,930	\$3,792	\$2,344	\$2,861	\$3,240	\$3,068
Total Operations	\$134,095	\$167,427	\$134,882	\$173,488	\$71,624	\$86,131	\$138,160	\$171,686

Note:

(a) This table excludes impacts of jobs and payroll relocated to Presidio from elsewhere in the region.

Total (direct and indirect) new payroll generation in the region is expected to range between \$246 and \$253 million per year under alternatives A, B, and D, and approximately \$126 million for Alternative C by the year 2010. Total new employment created in the region is expected to be between 6,400 and 6,800 under alternatives A, B, and D, and approximately 3,600 for Alternative C.

3. Summary of Regional and County Impact Multipliers

Summary employment and payroll multipliers for each of the alternatives are presented in Table 4.4. The summary multipliers are a weighted average of the job and payroll multipliers associated with the seven economic sectors at the Presidio. The summary regional employment multiplier at the Presidio is between 1.80 and 2.00 for all alternatives. This suggests that each job located at the Presidio will generate almost two jobs in the region.¹ The summary regional payroll multiplier is close to 2.75 for all alternatives. Similarly, the summary San Francisco employment and payroll multipliers are close to 1.44 and 1.88 respectively, for all alternatives.

Total jobs and earnings generation in the region is closely related to jobs and payroll at the Presidio. Alternative B, with the highest expected Presidio employment and payroll, has the highest expected Bay Area and San Francisco employment and payroll generation. Alternative C, with the lowest expected Presidio employment and payroll, has the lowest expected Bay Area and San Francisco employment and payroll. Alternatives A and D have expected Presidio payrolls and employment lying between those expected for alternatives B and C. Therefore, the economic impacts expected for alternatives A and D are expected to fall between the economic impacts expected for alternatives B and C.

¹ The summary multiplier used to estimate the impact of closing the Presidio on regional employment was 2.0. *Base Closure Final Environmental Impact Statement*. May 1991.

Table 4.4: Summary Multipliers and Gross Economic Impacts of Planning Alternatives at the Presidio

	Alternative A		Alternative B		Alternative C		Alternative D	
	2000	2010	2000	2010	2000	2010	2000	2010
Expenditures at Presidio								
Presidio Earnings	\$71,483	\$88,252	\$72,916	\$93,785	\$38,434	\$46,132	\$73,439	\$91,188
Presidio Employment	2,694	3,250	2,796	3,596	1,644	1,969	2,769	3,420
Earnings and Employment Impacts								
Bay Area Region								
Payroll	\$196,707	\$246,602	\$196,848	\$253,191	\$104,814	\$126,130	\$202,880	\$252,185
Summary Multiplier	2.75	2.79	2.70	2.70	2.73	2.73	2.76	2.77
Employment	5,311	6,455	5,308	6,827	3,007	3,606	5,418	6,705
Summary Multiplier	1.97	1.99	1.90	1.90	1.83	1.83	1.96	1.96
San Francisco County								
Payroll	\$134,095	\$167,427	\$134,882	\$173,488	\$71,624	\$86,131	\$138,160	\$171,686
Summary Multiplier	1.88	1.90	1.85	1.85	1.86	1.87	1.88	1.88
Employment	4,002	4,853	4,052	5,212	2,325	2,788	4,093	5,062
Summary Multiplier	1.49	1.49	1.45	1.45	1.41	1.42	1.48	1.48

Source: Tables 4.2 and 4.3.

4. Comparison of the Economic Impact of Presidio Operations with the Impact of Base Closure

All of the planning alternatives at the Presidio are estimated to generate enough jobs and earnings in the region to offset jobs and income lost from the closure of the Presidio as a military base. Nevertheless, anticipated job impacts are only a small percentage of existing jobs and income in the Bay Area and San Francisco.

The closure of the Presidio as a military base was estimated to cause a 6,500 job decline in Bay Area employment and a \$132 million decline in income (Table 4.5). In contrast, Park Service reuse of the Presidio is estimated to increase Bay Area employment by nearly 3,600 and Bay Area earnings by more than \$126 million under the lowest impact alternative (Alternative C). The high impact alternatives, B and D, are estimated to generate between 6,700 and 6,800 jobs and add some \$252 million to regional payrolls.

These changes are not expected to cause a large dislocation in the regional labor market. The increase in Presidio related jobs represents at most a 0.19 percent gain in regional employment. The increase in Presidio related earnings represents at most a 0.20 percent gain in regional income.

Nevertheless, these changes should provide a welcome boost to San Francisco's lagging economy. Much of the employment and income gain is expected to occur within the City and County. Reuse of the Presidio is estimated to increase City employment 0.6 percent and to increase City payroll about one percent.

Table 4.5: Comparison of the Economic Impact of the Presidio Alternatives With the Impact of Base Closure

I. Existing Income and Labor Force (a)		II. Impact of Presidio Military		III. Impact of Presidio Alternatives (c)				
(Income in \$ m)		Base Closure (b)		Alternatives				
				A	B	C	D	
San Francisco Bay Area								
Population	6,023,577							
Employment	3,639,000	Employment Loss	6,500	Employment Gain	6,455	6,827	3,606	6,705
		Percent Change	0.18	Percent Change	0.18	0.19	0.10	0.18
Personal Income	\$127,800	Personal Income Loss	\$132	Personal Income Gain	\$247	\$253	\$126	\$252
		Percent Change	0.10	Percent Change	0.19	0.20	0.10	0.20
San Francisco County (d)								
Population	723,959							
Employment	919,600	Employment Loss	3,250	Employment Gain	4,853	5,212	2,788	5,062
		Percent Change	0.35	Percent Change	0.53	0.57	0.30	0.55
Personal Income	\$17,200	Personal Income Loss	\$66	Personal Income Gain	\$167	\$173	\$86	\$172
		Percent Change	0.38	Percent Change	0.97	1.01	0.50	1.00

Notes:

(a) From Army Base Closure EIS. 1991.

(b) From Army Base Closure EIS. 1991.

(c) Year 2010 Impacts, see Table 4.3.

(d) Employment and income losses in San Francisco County from Presidio closure estimated to be one-half of S.F. Bay Area impact. (USACE, 1991)

Source: U.S. Army Corps of Engineers, 1991.

5. Construction Period Employment and Payroll Impacts

The construction period at the Presidio is expected to continue from year 1994 to year 2010 (See Table 4.6). The National Park Service estimates total construction costs for Alternative A to be approximately \$754 million. Almost all of these expenditures would be for rehabilitation of existing structures and various site improvements; however, under Alternative A, approximately 220,000 square feet of new structures would also be developed. Construction cost estimates for the other alternatives range between \$623 million (Alternative C) and \$1.013 billion (Alternative D). In Alternative A, the National Park Service expects construction to be most extensive between 1994 and 2000, when an estimated \$489 million would be spent. Construction would decline between 2001 and 2010, when an estimated \$264 million would be spent. The construction pattern would be similar in the other three alternatives, with approximately 65 to 70 percent of construction expenditures occurring by 2000, and the remainder by 2010.

During the period 1994 - 2000 construction activities are estimated to raise annual payroll in the region between \$108 million and \$171 million under Alternatives A, B and D and \$98 million under the low impact Alternative C. Construction is expected to bring between 3,300 and 5,100 jobs to the region under Alternatives A, B, and D and 3,000 jobs under Alternative C.

Presidio related construction activity will decline between the years 2001 and 2010, generating less than half the regional jobs and payroll generated by each alternative in the earlier period. During this period construction activities are estimated to raise annual payroll in the region between \$41 million and \$50 million under Alternatives A, B and D and \$37 million under the low impact Alternative C. Construction is expected to bring between 1,200 and 1,500 jobs to the region under Alternatives A, B, and D and 1,100 jobs under Alternative C.

Table 4.6: Direct, Secondary, and Total Construction Employment and Earnings Impacts at the Presidio

	Alternative A		Alternative B		Alternative C		Alternative D	
	1994-2000	2001-2010	1994-2000	2001-2010	1994-2000	2001-2010	1994-2000	2001-2010
Direct Employment and Earnings								
Employment	1,426	539	1,710	623	1,184	441	2,099	596
Annual Payroll (\$000)	\$39,294	\$14,849	\$47,102	\$17,162	\$32,607	\$12,161	\$57,837	\$16,423
Average Multipliers								
Bay Area								
Employment	2.30	2.30	2.30	2.30	2.30	2.30	2.30	2.30
Earnings	2.77	2.77	2.77	2.77	2.77	2.77	2.77	2.77
San Francisco County								
Employment	1.65	1.65	1.65	1.65	1.65	1.65	1.65	1.65
Earnings	1.89	1.89	1.89	1.89	1.89	1.89	1.89	1.89
Secondary Employment and Earnings								
Bay Area Region								
Employment	1,847	698	2,457	895	1,773	661	3,035	772
Payroll (\$000)	\$69,550	\$26,282	\$91,460	\$33,325	\$65,707	\$24,505	\$112,888	\$29,069
San Francisco County								
Employment	924	349	1,282	467	939	350	1,586	386
Payroll (\$000)	\$34,775	\$13,141	\$47,190	\$17,194	\$34,296	\$12,791	\$58,342	\$14,535
Total Employment and Earnings Impacts								
Bay Area Region								
Employment	3,273	1,237	4,167	1,518	2,957	1,103	5,134	1,368
Payroll (\$000)	\$108,843	\$41,131	\$138,562	\$50,487	\$98,314	\$36,666	\$170,725	\$45,492
San Francisco County								
Employment	2,350	888	2,991	1,090	2,123	792	3,686	982
Payroll (\$000)	74,068	27,990	\$94,292	\$34,357	\$66,903	\$24,951	\$116,179	\$30,958

Notes:

- (a) Construction employment estimated based upon assumption of 20.4 jobs per \$1 million expenditures.
- (b) Construction earnings estimated assuming \$.562 income per dollar expenditures.
- (c) Expenditures assumed distributed evenly over period.
- (d) Multipliers from: "Economic Multipliers for the San Francisco Bay Area". Association of Bay Area Governments.
 Following suggestion of ABAG representative, multipliers shown represent average of Type I and Type II for Income and Employment.
 Multipliers for San Francisco County equal midpoint between direct impact and type 1 multiplier.

Sources: Association of Bay Area Governments, National Park Service.

V. FISCAL IMPACTS

The first section of this Chapter analyzes several key variables of the Presidio reuse alternatives for their fiscal impacts, in terms of both revenues and costs, to the City of San Francisco. The analysis of increased costs to the City of San Francisco is limited to the following: Police, Fire, Emergency Medical Services, Storm Drainage, Water, and Wastewater services. The analysis of increased revenues to the City of San Francisco is limited to increases in possessory use taxes, sales taxes, business taxes, and several other "general government" revenue sources which are described in more detail below. Additional sections in this Chapter contain estimates of potential revenues to the Bay Area Rapid Transit District (BART) and the State of California General Fund from Presidio sales taxes, and revenues to the San Francisco Unified School District (SFUSD) from a special sales tax and reimbursements from the Federal Impact Aid Program.

A. Methodology

The estimates of fiscal impacts to the City of San Francisco due to Presidio conversion are primarily determined by the types and quantities of land uses proposed by the NPS for each Presidio reuse alternative, as summarized in Table 2.1.

1. Revenue Estimates for the City of San Francisco

Like the service cost estimates, the revenue estimates are highly dependent on the types and amounts of various land uses proposed for each of the four Presidio reuse alternatives. Revenue impacts from the planned conversion of the Presidio to parkland may derive from five major sources: possessory interest tax, sales and use tax, a tax on hotel room rentals, taxes and fees on business activity, and revenue from general governmental activity. Four of these categories - possessory use, sales and use, hotel, and business - might generate revenue from specific activities, while the fifth incorporates miscellaneous taxes, fees and fines. Due to the tax-exempt status of many park activities, the potential revenue generation varies substantially by type of use. Furthermore, not all of these tax sources may be applicable to the Presidio. The application of possessory interest tax to Presidio property is currently under legal review and has not yet been resolved; in the past, the Presidio has always been exclusive federal jurisdiction, and Presidio tenants have not paid possessory interest taxes.

The following sections describe the assumptions underlying the revenue projections. Revenues to the City of San Francisco generated by on-site activities are calculated for each of the four Presidio reuse alternatives using the revenue model, Presidio Revenue Generation Model, contained in Appendix A. The assumptions and inputs to this model are explained below.

a) Possessory Use Tax

Under California law, publicly-owned land is generally exempt from property taxation. However, property on such land that is leased to a taxable entity may be taxable. The taxable entity is said to have a possessory interest in the property, defined in terms of the entity's right to exclusive beneficial use of the property. A possessory interest in property commonly referred to as a "federal enclave" is not subject to taxation (a federal enclave is a site to which the United States has exclusive jurisdiction concerning such taxation). Preliminary legal analysis by the National Park Service, Office of the Solicitor indicates that possessory interest taxes would not apply to the Presidio, an area of continuing

exclusive federal jurisdiction; however, for comparative purposes, potential possessory interest revenues have been included in this fiscal analysis. The analysis presents revenues from this source separately from other revenues, so that it is possible for the reader to determine potential City revenues both with and without possessory interest taxes.

Even if possessory interest taxes do apply generally to the Presidio, many of the Presidio's tenants may themselves be exempt from taxation. Property leased to an entity which is itself exempt from taxation - for example, a non-profit educational institution - may carry an assessed value but not be subject to a property tax. State law permits exemptions from property tax for a number of specific types of property as well as a broad welfare exemption for properties used exclusively for religious, hospital, scientific, or charitable purposes. Generally, to receive a welfare exemption the owner of (or, in the case of publicly-owned land, the holder of a possessory interest in) the property must meet federal requirements for exemption from income taxation and must annually apply for and be granted the exemption.

While the application of welfare exemptions is on a case-by-case basis, for the purposes of this analysis it is assumed that a percentage of the occupants will receive some form of possessory use tax exemption. These percentages, shown in Appendix A, are based on the expected types of activities in each building type. Building types occupied entirely by governmental agencies are one hundred percent exempt from taxation, while other building types are expected to have a mixture of occupants, some of which will be tax-exempt. Building space assumed to be occupied by tax-exempt organizations is excluded from the analysis of increased possessory use tax revenues. An adjustment is made for vacant space by applying an occupancy factor of 70 percent to the building square footage in 2000 and 90 percent in 2010.

Based on discussions with the San Francisco Assessor's Office, the methods and factors likely to be applied to possessory interests in park properties were utilized in projecting possessory use tax revenue. Possessory interests are valued for tax purposes on the basis of the economic rent paid to the landowner using standard appraisal methods. For the purposes of this fiscal analysis, lease terms of 15 years were assumed for all leases, and lease rates, shown in Appendix A, were developed for each building type based on a preliminary review of current market conditions. Present values, also presented in Appendix A, were calculated based on a lease inflation factor of 4.00 percent and a discount rate of 10.00 percent. The Assessor's office applies an adjustment factor for administrative expenses to possessory interests which is assumed to be 15.00 percent. Finally, a possessory use tax allocation factor of 0.52 is applied to the property tax rate of 1.15 percent to obtain the projected possessory use tax revenues available to support City and County level services. Calculations of possessory use tax revenues generated by each of the Presidio reuse alternatives are summarized in Appendix A.

b) Sales and Use Tax

Sales and use tax is collected and distributed by the State Board of Equalization. The current sales tax rate in San Francisco is 8.50 percent. The jurisdictions receiving a share of the sales and use tax levy include the State of California (5.50 percent), the Bay Area Rapid Transit District (0.50 percent), the City's general fund (1.00 percent), the City's Municipal Railway (0.50 percent), the County Transit Fund (0.25 percent) and the San Francisco Unified School District (0.25 percent). In addition, 0.50 percent goes into the State public safety sales tax fund, which is then distributed back to California counties based on their proportionate share of retail sales statewide.

For the purposes of this analysis, the fiscal impact associated with the sales and use tax includes the four levies specific to the City and County of San Francisco, and assumes that San Francisco's share of the new public safety sales tax will be roughly equal to 0.50 percent of sales, for a total sales tax allocation equal to 2.25 percent of taxable sales. Sales tax revenue impacts to the San Francisco Unified School District, BART, and the State of California General Fund are identified separately, in the sections of this chapter dealing with these jurisdictions. The sales tax revenue estimates in this analysis are based on estimated retail sales derived from visitor, resident, and employee purchases in non-military retail and food and beverage outlets located in the Presidio. These estimates are shown in Chapter VII. The results of the sales tax revenue calculations are shown in Appendix A.

c) Business Tax

The City of San Francisco imposes a business tax and a registration fee on eligible businesses operating in the City. The registration fee is \$150 and is payable by all businesses. The business tax is based either on the gross receipts or on the payroll of businesses in the City. Businesses which are exempt from federal income taxation are generally also exempt from payment of the City business tax. The revenue impacts analysis utilizes the business payroll tax, calculated by applying the 1.50 percent tax rate to the payroll of taxable businesses operating in the Presidio following conversion. The percentages of tax-exempt occupants are applied to the payroll to determine the payroll amount eligible for the payroll tax. Total business tax revenues are summarized in Appendix A.

d) Hotel Tax

Hotel rooms rented in the City of San Francisco are subject to a tax of 12.00 percent. The analysis multiplied guest lodging revenues estimated in Chapter VII of this report by the transient occupancy tax rate to calculate the revenues generated by this tax in the Presidio. These estimates are shown in Appendix A.

e) Water and Sewer User Fees

The City and County of San Francisco will also derive revenues from user fees collected from provision of water and sewer services to the Presidio. However, according to representatives of the City of San Francisco, Department of Public Works, the fees collected for these services are calculated so that the systems pay for themselves, without subsidy from other City revenue sources. The provision of these services to the Presidio should not result in any net fiscal deficits or benefits to the City. For informational purposes, the impact analysis section which follows contains estimates of charges for water and sewer services based on 1993 rate information provided by the City of San Francisco (San Francisco Department of Public Works 1993).

f) Other Revenue Sources

There are a number of taxes, fines, fees and forfeitures which produce revenue for the City of San Francisco and which derive from activities of the general populace or, in the case of the utility use tax, from business activities. Based on conversations with

representatives of the San Francisco Controller's Office conducted in April of 1994, the analysis focused on significant revenue sources likely to be affected by Presidio activities, including Motor Vehicle In-Lieu Fees, Gas Taxes, Utility User Taxes, and Franchise Fees (San Francisco Controller's Office, April 1994). Each of these revenue sources is affected by the level of commercial and/or residential activity within the City; however, because of the unique situation of the Presidio, it is not clear that the Utility User Tax and Franchise Fee would apply in the same way as in the rest of San Francisco. In the case of the Utility User Tax, which is applied to commercial customers' utility bills, Federal, State, and some non-profit organizations are exempt. This means that it is possible that many Presidio tenants may not pay this tax. Franchise fees are assessed on the basis of certain utility providers' gross revenues as compensation for using City rights-of-way to provide the services. Additional review is necessary to determine if Franchise Fees would be applicable for services provided in the Presidio, since the Presidio itself does not contain any City-owned rights-of-way. Although it is possible that Presidio activities may ultimately generate some revenues for the City from Utility User Taxes and Franchise Fees, the analysis conservatively assumes Presidio activities will generate no new revenues from these two sources. This leaves Motor-Vehicle In-Lieu Fees and Gas Taxes, two subventions which the State of California allocates to local jurisdictions based on formulae largely related to local population. To estimate potential revenues from these two sources, current revenue generated for the City by motor vehicle in-lieu payments, and gas taxes are summed and divided by the population to obtain a per capita revenue figure of \$107. The baseline revenue assumptions are shown in Appendix A. This figure is then multiplied by the projected population for the Presidio in 2000 and 2010 to obtain projected revenue from these sources. Revenues derived from this source are summarized in Appendix A.

g) U.S. Department of the Interior, Bureau of Land Management, Payment in Lieu of Taxes for Entitlement Lands

Under this program, the City of San Francisco is eligible to receive approximately \$1,110 per year, or roughly seventy-five cents per acre, in Presidio-related payments in lieu of taxes. The City can use these revenues for any governmental purpose. During the Army's tenure at the Presidio, this program also applied to the Presidio acreage, thus, there will be no net change in revenues from this source. For this reason, the analysis excludes Entitlement Lands Payments in Lieu of Taxes.

2. Public Service Cost Estimates for the City of San Francisco

The data contained in Table 2.1 indicate the building use assumptions for the Presidio, which have been combined with assumptions about service provision responsibilities and used to formulate estimates of the cost impacts to the City of San Francisco, as explained in more detail below. Estimates for the transportation service costs are provided in the *Final General Management Plan Amendment Environmental Impact Statement* (1994a) and the *Presidio Transportation Planning and Technical Analysis Report* (Peccia & Associates 1994).

a) Public Safety Service Costs

Public service cost information regarding Police, Fire, and Emergency Medical Services are from *Presidio of San Francisco Public Safety Analysis* (Jones & Jones 1993). This

report details recommended service responsibilities and levels of service for provision of public safety services on the Presidio.

b) Water, Sewer, and Stormwater Service Costs

Estimated impacts of the Presidio project related to water, sewer, and storm water systems are based on the estimates of residents, guests, visitors, and estimated needs for irrigation water developed by the NPS. These data have been reviewed by the City of San Francisco in order to determine the fiscal impacts of these service needs on the City. The estimated costs for the City of San Francisco to provide the necessary services are detailed in the impact analysis sections below.

3. Water Consumption Estimates.

The Presidio will rely on the City of San Francisco for at least a portion of its water needs and for all of its sewage treatment and disposal needs. The first step in determining the fiscal impacts to the City of San Francisco associated with meeting these needs was to estimate total Presidio water consumption and sewer discharge under each reuse alternative. Total potable water consumption was derived by applying average water consumption figures to the various uses proposed within each alternative, as shown in Table 5.1. Total water consumption was derived by adding total potable water consumption to estimated irrigation water consumption of approximately 1.0 million gallons per day. These water needs were then subtracted from water available on-site totalling approximately 1.6 million gallons per day, as estimated by the Department of Housing and Engineering, U.S. Army Presidio.

Although total water consumption is not projected to exceed total water available on-site, a certain minimum amount of City of San Francisco water is projected to be needed due to special uses in the Letterman complex which require water at high levels of purity not presently available from on-site sources. Depending on uses present in the Presidio, this minimum level of City of San Francisco water consumption is estimated to range between 14,000 and 43,000 gallons per day by the year 2010, except for Alternative C, in which the Letterman Hospital would be outside the park boundaries, and there would be no demand for City water. However, in order to compensate for this consumption of City water, the Presidio could transfer equal amounts of excess water from on-site sources, which is suitable for everyday potable uses, to the City of San Francisco water system. Letterman boiler upgrades may eliminate the need for city water. Provision of NPS water at the PHSB would reduce historical city water use since the City used to provide the water at that location. By the year 2010, it is expected that a reclaimed water system established by the City of San Francisco would be on-line and capable of supplying irrigation water for use at the Presidio.

4. Sanitary Sewer Discharge Estimates

Total sewage generated at the Presidio is estimated by multiplying total potable water consumption by 85 percent, which is an engineering standard commonly used to estimate sewage discharge (Metcalf and Eddy 1991). Table 5.2 shows estimated water and sewer impacts from the four Presidio reuse alternatives.

Table 5.1: Water Use Estimate Detail

Year 2000 Water Use Estimates (gal./day)

Land Use	Use Category	Unit(s) of Measure	Avg. Daily Water Use	Alt. A		Alt. B		Alt. C		Alt. D	
				Units	Use	Units	Use	Units	Use	Units	Use
Residential & Dormitory	Indiv. Residence Apartment House	Residents	80	3,198	255,846	3,748	299,878	3,410	272,794	3,540	283,238
		Residents	100	623	62,336	682	68,200	425	42,516	469	46,876
		Employee	10	82	820	62	620	48	480	80	800
Industrial	Office	Employee	15	301	4,515	320	4,800	301	4,515	338	5,070
Institutional	School	Employee	25	328	8,200	88	2,200	82	2,050	319	7,975
Medical/Research	Hospital	Bed	150	0	0	200	30,000	0	0	200	30,000
		Employee	10	1,075	10,750	1,014	10,140	0	0	1,014	10,140
Office	Office	Employee	15	1,614	24,210	2,407	36,105	1,896	28,440	2,011	30,165
Retail	Dept. Store	Employee	10	431	4,310	252	2,520	251	2,510	275	2,750
Warehouse	Office	Employee	15	63	945	85	1,275	68	1,020	94	1,410
Visitor	Public Lavatory	Visitors	5	17,800	89,000	12,300	61,500	14,200	71,000	17,000	85,000
TOTAL				460,932		517,238		425,325		503,424	

Source: National Park Service.

Table 5.1: Water Use Estimate Detail, cont.

Year 2010 Water Use Estimates (gal./day)

Land Use	Use Category	Unit(s) of Measure	Avg. Daily Water Use	Alt. A		Alt. B		Alt. C		Alt. D	
				Units	Use	Units	Use	Units	Use	Units	Use
Residential & Dormitory	Indiv. Residence Apartment House	Residents	80	1,862	148,948	3,798	303,877	992	79,384	3,456	276,479
		Residents	100	855	85,490	708	70,750	515	51,460	806	80,612
		Employee	10	106	1,060	80	800	62	620	103	1,030
Industrial	Office	Employee	15	375	5,625	412	6,180	362	5,430	433	6,495
Institutional	School	Employee	25	514	12,850	113	2,825	106	2,650	409	10,225
Medical/Research	Hospital	Bed	150	0	0	200	30,000	0	0	200	30,000
		Employee	10	1,382	13,820	1,304	13,040	0	0	1,304	13,040
Office	Office	Employee	15	2,073	31,095	3,095	46,425	2,280	34,200	2,426	36,390
Retail	Dept. Store	Employee	10	257	2,570	324	3,240	283	2,830	324	3,240
Warehouse	Office	Employee	15	75	1,125	110	1,650	83	1,245	89	1,335
Visitor	Public Lavatory	Visitors	5	23,000	115,000	18,900	94,500	20,000	100,000	21,900	109,500
TOTAL				417,583		573,287		277,819		568,346	

Source: National Park Service.

Table 5.2: Presidio Water and Sewer System Impacts

Sewer and Water System Demand Estimates (gal./day)	Alt. A	Alt. B	Alt. C	Alt. D
Potable Water (Residents, Employees, Visitors) Demand-2000(a)	460,932	517,238	425,325	503,424
Potable Water (Residents, Employees, Visitors) Demand-2010(a)	417,583	573,287	277,819	568,346
Estimated Irrigation Water Demand-2000(b)	1,000,000	1,000,000	1,000,000	1,000,000
Estimated Irrigation Water Demand-2010(b)	1,000,000	1,000,000	1,000,000	1,000,000
Estimated Sewage Discharge-2000(c)	391,793	439,653	361,526	427,911
Estimated Sewage Discharge-2010(c)	354,946	487,294	236,146	483,094
On-Site Water Availability (gal./day)	Alt. A	Alt. B	Alt. C	Alt. D
Estimated Minimum Available Potable Water-2000(d)	1,600,000	1,600,000	1,600,000	1,600,000
Estimated Minimum Available Potable Water-2010(d)	1,600,000	1,600,000	1,600,000	1,600,000
Demand for Outside Services (gal./day)	Alt. A	Alt. B	Alt. C	Alt. D
Potable Water (Residents, Employees, Visitors) Demand-2000(e)	0	0	0	0
Potable Water for Letterman Medical/Research Uses-2000(f)	10,750	40,140	0	40,140
Reclaimed Water For Irrigation-2000(g)	0	0	0	0
Sewage Discharge-2000(h)	391,793	439,653	361,526	427,911
Potable Water (Residents, Employees, Visitors) Demand-2010(e)	0	0	0	0
Potable Water for Letterman Medical/Research Uses-2010(f)	13,820	43,040	0	43,040
Reclaimed Water For Irrigation-2010(g)	1,000,000	1,000,000	1,000,000	1,000,000
Sewage Discharge-2010(h)	354,946	487,294	236,146	483,094
Potential On-Site Water Surplus (gal./day)	Alt. A	Alt. B	Alt. C	Alt. D
Surplus Water From On-Site Sources-2000(i)	149,818	122,902	174,675	136,716
Surplus Water From On-Site Sources-2010(j)	1,196,237	1,069,753	1,322,181	1,074,694

Notes:

- (a) Potable water demand from residents, guests, and employees based on average water consumption figures published in Wastewater Engineering: Treatment, Disposal and Reuse; Metcalfe and Eddy, Inc., 1991. Includes water needed for special uses such as hospital, research, and boiler feeder. See Table 5.1 for detail of water use projections.
- (b) Based on data from Department of Engineering and Housing, U.S. Army Presidio.
- (c) Sewage discharge is 85 percent of potable water use.
- (d) On-site water availability estimated to range from 1.6 to 1.8 million gal./day. Estimate by Department of Engineering and Housing, U.S. Army Presidio.
- (e) On-site water is projected to be sufficient to meet demand for potable use.
- (f) Potable water for medical/research uses is a component of the total potable water use figures shown in the upper part of the table. Existing connection to City of S.F. water system will be maintained to supply Letterman special uses. Consumption data from the Department of Engineering and Housing, U.S. Army Presidio.
- (g) The reclaimed water system will not be on-line until after 2000. In 2000, all irrigation water is assumed to be supplied by on-site sources. By 2010, all Presidio irrigation needs can be met using reclaimed water supplied by the City of San Francisco.
- (h) All Presidio sewage discharge will be fed into the City of San Francisco sewer system for treatment and disposal.
- (i) Year 2000 potential surplus water equals on-site availability less potable water demand less irrigation water demand plus City of S.F. water consumed. Surplus water may be available for creek restoration and/or transfer to City of San Francisco water system if City water is used at Letterman.
- (j) Year 2010 potential surplus water equals on-site availability less potable water demand plus City of S.F. water consumed. By 2010 irrigation needs will be met by reclaimed water. Surplus water may be available for wetlands restoration and/or transfer to City of San Francisco water system if City water is used at Letterman.

Source: National Park Service.

B. Impacts - City of San Francisco

This section details the results of the analysis of selected revenues and costs to the City of San Francisco which would be generated by the four Presidio reuse alternatives. This section is divided into four sub-sections; one for each alternative. In addition to the text contained in this section, Appendix A contains printouts of the model used to estimate the revenues which would be generated by the project.

1. Alternative A

a) Direct Revenue Impacts to City of San Francisco

The revenue impacts for Alternative A, expressed in constant dollars, total \$2,590,000 from all sources for the year 2000 and \$3,655,000 by the year 2010.

Table 5.3 summarizes individual sources of tax revenue for Alternative A in each of the two periods. Hotel tax revenue accounts for the largest share of revenue in both years. As many of the revenue sources are dependent on the square footage utilized for different business activities, variances between the two periods are due in part to differences in square footage available and occupied in each period. All revenues are expressed in constant dollars.

Table 5.3: Alternative A: Revenue Impacts From All Sources
(Constant Dollars)

<i>Revenue Source</i>	<i>2000</i>	<i>2010</i>
Possessory Use Tax	\$611,000	\$804,000
Sales Tax	\$439,000	\$568,000
Business Tax	\$376,000	\$442,000
Hotel Tax	\$797,000	\$1,628,000
Other	\$367,000	\$213,000
TOTAL	\$2,590,000	\$3,655,000

It should be recognized that not all these tax sources may apply to the Presidio. Currently, the applicability of possessory use taxes to the Presidio is under legal review.

b) Direct Cost Impacts to City of San Francisco

This section contains information regarding the cost impacts of the proposed project on the City of San Francisco to provide basic services required by the Presidio. Services covered in this section include police, fire, emergency medical (EMS), water, sewer and storm water. Some of the information regarding the proposed provision of police, fire, and emergency medical services in the Presidio is from *Presidio of San Francisco Public Safety Analysis* (Jones & Jones 1993).

i) Police

The proposed project is not expected to create significant fiscal impacts for the City of San Francisco due to police protection requirements. The National Park Service would have primary law enforcement responsibility within the Presidio. Law enforcement services at the Presidio are proposed to be provided by the United States Park Police, which is currently responsible for law enforcement duties within the Presidio. Dispatching for the Presidio police services will be handled by personnel assigned to the Park Police. These personnel will also provide dispatching for the Presidio Fire Department and its associated emergency medical services. The park would not require regular patrols by the City of San Francisco Police Department; however, the two police departments established a mutual aid agreement which will allow personnel from one department to assist the other if requested in time of emergency. The fiscal impacts of participating in this an agreement have not been evaluated for the City of San Francisco but it is anticipated that this agreement will be mutually beneficial.

ii) Fire

The proposed project is not expected to create significant fiscal impacts for the City of San Francisco due to fire protection requirements. Fire protection services at the Presidio are proposed to be provided by the Presidio Fire Department under National Park Service management. The City of San Francisco Fire Department would not include the Presidio in its regular response area; however, a mutual aid agreement which between the San Francisco and Presidio fire departments is pending. This agreement will allow either department to request assistance from the other in time of special need. The fiscal impacts of participating in this an agreement have not been evaluated for the City of San Francisco but it is anticipated that this agreement will be mutually beneficial.

iii) Emergency Medical Services (EMS)

The proposed project is not expected to create significant fiscal impacts for the City of San Francisco due to emergency medical service requirements. EMS, including basic and advanced life support and hospital transportation for victims are proposed to be provided within the Presidio by paramedic personnel assigned to the proposed Presidio Fire Department. EMS units operated by the City of San Francisco's Department of Public Health would not normally respond to emergencies in the Presidio; however, an EMS mutual aid agreement has been established between the two jurisdictions. Ambulance costs would be charged to patients. The fiscal impacts to the City of San Francisco resulting from participation in such an agreement have not been evaluated but it is anticipated that this agreement will be mutually beneficial.

iv) Water

The NPS would own and maintain the entire water distribution system within the Presidio. This would require that NPS take over responsibility for the maintenance of the water distribution at the Public Health Service hospital (PHSH). Water used in the Presidio would come from the Presidio's own on-site sources and would be treated by on-site facilities operated by the NPS. Some potential unique uses, such as research and health care facilities, may need the higher-quality City of San Francisco water in the future. However, if this need occurs in the future, the goal would be to offset the consumption of City water by providing an equal amount of water from Presidio water

sources to the City. The goal of the NPS would also be to connect all future users, including the PHSB, to the Presidio water system. Emergency connections between the City of San Francisco and Presidio water systems would be maintained.

The Presidio is estimated to require approximately 11,000 gallons per day of water supplied by the City of San Francisco in 2000, and approximately 14,000 gallons per day in 2010. According to rate information provided by the City of San Francisco's Department of Public Works, annual charges for water supplied to the Presidio by the City of San Francisco water system for this alternative would amount to approximately \$5,000 in 2000 and \$6,000 in 2010. It should be noted that these charges are based on the 1992/1993 rate structure, and may vary in the future depending on the overall cost to operate the City's water system, and on specific costs to supply water to the Presidio.

Service charges for provision of reclaimed water to the Presidio are not available at this time. According to the representatives of the Department of Public Works, the City's cost to provide reclaimed water in the future is likely to be somewhat higher than the current cost to provide potable water, due to the need to establish new infrastructure systems to collect and distribute the reclaimed water. Once the reclaimed water system is ready to go on-line, it is likely that the City will develop a rate structure which would promote use of reclaimed water where appropriate and at the same time provide incentive for users to conserve potable water, by setting charges for reclaimed water below the charges for potable water. In effect, the overall rate structure would subsidize the cost of reclaimed water using revenues collected from potable water services.

v) Sewer

NPS would own, maintain, and operate the entire wastewater collection system at the Presidio. The NPS would assume responsibility for maintenance of the sewer infrastructure at the PHSB site. All wastewater from the Presidio would be fed into the City of San Francisco's wastewater system for treatment and disposal. As shown in Table 5.2, estimated sewage discharge for Alternative A would be approximately 392,000 gallons per day in 2000, and would drop down to 354,000 gallons per day in 2010. NPS would pay sewer fees to the City for wastewater treatment and disposal. NPS would offset these payments by collecting user fees from its tenants to pay for wastewater system maintenance and disposal.

According to current rate information provided by the City of San Francisco, Department of Public Works, charges for disposal of Presidio wastewater would be approximately \$898,000 in the year 2000 and \$813,000 in year 2010. These estimated charges are based on the City's current sewage disposal rates and estimates of Presidio wastewater generation. Future charges for sewage disposal services will vary according to the actual amount of wastewater generated and the City's overall cost to provide sewage disposal services.

vi) Storm Water

NPS would own, maintain, and operate the entire storm drainage system at the Presidio. The City of San Francisco would not be affected.

c) Summary For Alternative A

Several different direct cost and revenue items were examined as part of this analysis of the fiscal impacts of the project to the City of San Francisco. Significant new revenues would be generated for the City from various sources due to activities which would occur in the Presidio. On the other hand, because the Park Service intends to be responsible for providing its own Police, Fire, and EMS services, the City of San Francisco will not incur new costs to provide these expensive public safety services in the Presidio. The City of San Francisco will provide the Presidio with a limited amount of potable water and will treat and dispose of wastewater generated by Presidio users; however, the City will recover its costs to provide these services by collecting user fees. The difference between costs and revenues (excluding water and sewer user fees) identified in this fiscal analysis would result in a net fiscal benefit to the City of San Francisco of \$3,655,000 by per year 2010.

2. Alternative B

a) Revenue Impacts to City of San Francisco

The revenue impacts for Alternative B, expressed in constant dollars, total \$2,784,000 from all sources in 2000 and \$3,568,000 in 2010.

Table 5.4 presents individual sources of tax revenue for Alternative B in each of the two periods. Revenue from possessory use tax accounts for the largest share of revenue in both years by a substantial margin. As many of the revenue sources are dependent on the square footage utilized for different business activities, variances between the two periods is due in part to differences in square footage available and occupied in each period. All revenue is expressed in constant dollars.

Table 5.4: Alternative B: Revenue Impacts From All Sources
(Constant Dollars)

<i>Revenue Source</i>	<i>2000</i>	<i>2010</i>
Possessory Use Tax	\$1,129,000	\$1,452,000
Sales Tax	\$402,000	\$558,000
Business Tax	\$463,000	\$592,000
Hotel Tax	\$332,000	\$508,000
Other	\$458,000	\$458,000
TOTAL	\$2,784,000	\$3,568,000

It should be recognized that not all these tax sources may apply to the Presidio. Currently, the applicability of possessory use taxes to the Presidio is under legal review.

b) Cost Impacts to City of San Francisco

i) Police, Fire, and EMS.

The provision of services would be the same as in Alternative A. The City of San Francisco is not expected to be significantly impacted, since primary responsibility for these services will rest with the National Park Service.

ii) Water, Sewer, and Stormwater.

Under this alternative, the Presidio boundaries would not be adjusted to include the PHS site. The provision of water, wastewater, and storm drainage services would be the same as under Alternative A, except that the NPS would not assume responsibility for maintenance of the water and wastewater systems and provision of water service to the PHS site.

Consumption of City of San Francisco water for special uses is estimated to be more than in Alternative A, amounting to approximately 40,000 gallons per day in 2000 and 43,000 gallons per day in 2010. At current rates, the Presidio would be billed approximately \$18,000 in the year 2000 and \$19,000 in 2010 for use of City potable water. It is estimated that by year 2010, reclaimed water usage for this Presidio reuse alternative would amount to approximately one million gallons per day. Estimated charges for reclaimed water supplied by the City of San Francisco are not available, as a rate schedule for reclaimed water has not yet been developed.

Sewage discharge under Alternative B would be increased in comparison to Alternative A. This increase in sewage discharge is associated with an increase in potable water consumption. For this alternative, the estimate sewage discharge is approximately 440,000 gallons per day in 2000 and 487,000 gallons per day in 2010. Based on current sewage rates, the charges for Presidio sewage disposal would be approximately \$1,008,000 in the year 2000 and would rise to about \$1,117,000 in 2010 due to a slightly increased volume of discharge resulting from increased building occupancy and guest use of the Presidio.

c) Summary For Alternative B

As in Alternative A, this alternative would generate fiscal benefits to the City of San Francisco. This is due to the fact that the new revenues which would be generated by onsite activities would not be accompanied by new costs to the City for Fire, Police, or EMS services within the Presidio, since the Park Service would provide these services at its own cost. Although the City would provide water and sewer services to the Presidio, the city would be able to recover its costs for these services by collecting user fees. The total revenues which would be generated by this alternative (excluding water and sewer user fees) would be \$3,568,000 by the year 2010.

3. Alternative C

a) Revenue Impacts to City of San Francisco

The revenue impacts for Alternative C, expressed in constant dollars, total \$2,552,000 from all sources for the year 2000 and \$2,817,000 by the year 2010.

Table 5.5 presents individual sources of tax revenue for Alternative C in each of the two periods. Possessory use tax revenue accounts for the largest share of revenue in 2000 but by 2010, hotel taxes are expected to be the largest source of revenues. The decline in the importance of possessory use tax is due to the removal of a substantial portion of the taxable housing units by the year 2010. As many of the revenue sources are dependent on the square footage utilized for different business activities, variances between the two periods is due in part to differences in square footage available and occupied in each period. All revenue is expressed in constant dollars.

Table 5.5: Alternative C: Revenue Impacts From All Sources
(Constant Dollars)

<i>Revenue Source</i>	<i>2000</i>	<i>2010</i>
Possessory Use Tax	\$1,026,000	\$664,000
Sales Tax	\$399,000	\$485,000
Business Tax	\$383,000	\$458,000
Hotel Tax	\$372,000	\$1,102,000
Other	\$372,000	\$108,000
TOTAL	\$2,552,000	\$2,817,000

It should be recognized that not all these tax sources may apply to the Presidio. Currently, the applicability of possessory use taxes to the Presidio is under legal review.

b) Cost Impacts to City of San Francisco

i) Police, Fire, and EMS

The provision of services would be the same as in Alternative A. The City of San Francisco is not expected to be significantly impacted, since primary responsibility for these services will rest with the National Park Service.

ii) Water, Sewer, and Stormwater

The Presidio boundaries would not be adjusted to include the PHS site. Also under this alternative, LAIR and Letterman hospital would be excised from the park. The provision of water, wastewater, and storm drainage services would be the same as under Alternative A, except that the City of San Francisco would retain responsibility for maintenance of the water and wastewater systems for PHS and would assume new responsibility for providing these services to LAIR and Letterman hospital.

This alternative is not projected to create demand for water from the City of San Francisco for special uses located in the Presidio; thus, the City would derive no revenues from sale of potable water to the Presidio.

In this alternative, sewage discharge would also be the least of the four Presidio reuse alternatives. Total Presidio sewage discharge is estimated to be about 362,000 gallons

per day in 2000, and 236,000 gallons per day in 2010. The reduction in sewage discharge is due primarily to the removal of housing units between 2000 and 2010. Based on current rates, the charges for sewage disposal for these two years would be approximately \$829,000 and \$541,000, respectively.

c) Summary for Alternative C

As in Alternative A, this alternative would generate fiscal benefits to the City of San Francisco. This is due to the fact that the new revenues which would be generated by onsite activities would not be accompanied by new costs to the City for Fire, Police, or EMS services within the Presidio, since the Park Service would provide these services at its own cost. Although the City would provide water and sewer services to the Presidio, the city would be able to recover its costs for these services by collecting user fees. The total revenues which would be generated by this alternative (excluding water and sewer user fees) would be \$2,817,000 by the year 2010.

4. Alternative D

a) Revenue Impacts to City of San Francisco

The revenue impacts for Alternative D, expressed in constant dollars, total \$2,695,000 from all sources for the year 2000 and \$4,144,000 by the year 2010.

Table 5.6 presents individual sources of tax revenue for Alternative D in each of the two periods. Hotel taxes account for the largest share of revenue in both years. As many of the revenue sources are dependent on the square footage utilized for different business activities, variances between the two periods is due in part to differences in square footage available and occupied in each period. All revenue is expressed in constant dollars.

Table 5.6: Alternative D: Revenue Impacts From All Sources
(Constant Dollars)

<i>Revenue Source</i>	<i>2000</i>	<i>2010</i>
Possessory Use Tax	\$651,000	\$767,000
Sales Tax	\$484,000	\$600,000
Business Tax	\$424,000	\$511,000
Hotel Tax	\$747,000	\$1,896,000
Other	\$389,000	\$370,000
TOTAL	\$2,695,000	\$4,144,000

It should be recognized that not all these tax sources may apply to the Presidio. Currently, the applicability of possessory use taxes to the Presidio is under legal review.

b) Cost Impacts to City of San Francisco

i) Police, Fire, and EMS

The provision of services would be the same as in Alternative A. The City of San Francisco is not expected to be significantly impacted, since primary responsibility for these services will rest with the National Park Service.

ii) Water, Sewer, and Stormwater

Arrangements for provision of water, wastewater, and storm drainage would be the same as for Alternative A, but the Department of Defense would be responsible to the NPS for costs to provide water, wastewater, and storm drainage services to the Wherry housing and Letterman complex.

Demand for water from the City of San Francisco is estimated to be approximately 40,000 gallons per day in 2000 and 43,000 gallons per day in 2010, while sewage discharge is estimated to be approximately 428,000 gallons per day in 2000, increasing to 483,000 gallons per day in 2010. Based on current rates, the Presidio would pay about \$18,000 in 2000 and \$19,000 in 2010 for water provided by the City. The Presidio would pay the City about \$981,000 in sewer fees in 2000 and about \$1,107,000 in 2010 based on the current rates.

c) Summary for Alternative D

As in the other alternatives, Alternative D would generate fiscal benefits to the City of San Francisco. This is due to the fact that the new revenues which would be generated by onsite activities would not be accompanied by new costs to the City for Fire, Police, or EMS services within the Presidio, since the Park Service would provide these services at its own cost. Although the City would provide water and sewer services to the Presidio, the city would be able to recover its costs for these services by collecting user fees. The total revenues which would be generated by this alternative (excluding water and sewer user fees) would be \$4,144,000 in year 2010.

C. Impacts - State and B.A.R.T.

1. Methodology

Retail sales which occur on the Presidio will generate sales tax revenues which will accrue to the State of California General Fund, as well as the Bay Area Rapid Transit District (BART). State and regional sales tax revenue estimates are based on the total on-site retail sales estimated for each of the four Presidio reuse alternatives as shown in Appendix A. Whereas estimated San Francisco sales tax revenues were derived by multiplying the total on-site retail sales by San Francisco's combined 2.25 percent local tax rate, State, regional, and San Francisco Schools sales taxes are estimated by applying the State's 5.50 percent rate, BART's 0.50 percent rate, and the San Francisco schools' 0.25 percent rate, respectively.

2. Impacts

Following are results of the calculations of the share of Presidio retail sales taxes which would accrue to the State of California and to the Bay Area Rapid Transit District under each of the reuse alternatives.

a) Alternative A

State Sales Tax. The State of California would derive approximately \$1,074,000 in revenues from sales taxes collected on retail sales in the Presidio in the year 2000, and about \$1,390,000 in taxes in sales by the year 2010.

BART Sales Tax. BART's share of sales taxes collected on retail sales in the Presidio would amount to \$98,000 in 2000, and \$126,000 in 2010.

b) Alternative B

State Sales Tax. Alternative B would generate approximately \$982,000 in revenues for the State General Fund in 2000 and approximately \$1,365,000 in 2010.

BART Sales Tax. Retail activities on the Presidio would generate approximately \$89,000 in sales tax revenues for BART in 2000 and approximately \$124,000 in 2010.

c) Alternative C

State Sales Tax. State sales tax revenues generated by on-site Presidio retail activity would total to about \$975,000 in 2000 and \$1,185,000 in 2010.

BART Sales Tax. Year 2000 BART sales tax revenues would be roughly \$89,000 while year 2010 BART sales tax revenues would be \$108,000.

d) Alternative D

State Sales Tax. Alternative D would generate the most on-site sales tax revenues of the four reuse alternatives. The State's share of sales taxes collected from retail sales in the Presidio would be approximately \$1,183,000 in 2000 and \$1,467,000 in 2010.

BART Sales Tax. BART sales tax revenues generated by Presidio retail sales activity would be about \$108,000 in year 2000, and \$133,000 in year 2010.

D. Impacts - San Francisco Unified School District

1. Methodology

According to the structure of the public school finance system in California, San Francisco school district revenues are established annually by the State Department of Education, based primarily on average daily attendance. If a school district's property tax revenue allocations do not parallel the changes in the district's revenue limit, the state will adjust its contribution of operating revenues so that the local school district is funded

to the new revenue limit. As enrollment changes at the local level, the amount of money available to the district on a per student basis remains relatively constant, except for cost of living adjustments. Because of this school financing arrangement, it is not expected that minor changes in enrollment resulting from changes in Presidio occupancy would have a significant impact on the San Francisco Unified School District's (SFUSD) average per pupil operating funds provided from local and State sources. For this reason, this section does not estimate changes in SFUSD's general operating costs or revenues due to changes in Presidio occupancy.

SFUSD may qualify for federal reimbursement for students enrolled within the District who are dependents of people living or working at the Presidio. The National Park Service's preliminary legal review indicates that this program will apply to the Presidio. Through this program, the U.S. Department of Education provides funding to local school districts whose enrollment includes various types of "federally connected" children, including children who live on federal property or who live with a parent who is employed on federal property. Revenues from this source are not included in the school district's revenue limit, meaning that changes in the amount of federal reimbursements represent a net impact to District operating revenues. According to the U.S. Department of Education, Impact Aid Program payments to SFUSD related to the Army use of the Presidio totaled approximately \$587,000 in the 1990-1991 school year. (U.S. Department of Education 1994) Following is a description of the assumptions and data used to estimate potential Federal Impact Aid payments to SFUSD.

According to current Impact Aid Program guidelines, school districts are entitled to approximately \$750 per student who lives in either military housing or other housing located on federal property. There is a special payment in addition to the standard payment for any children living in military housing enrolled in special education. This additional payment is approximately \$1,249. For each student living with a parent who works on federal property but does not live on federal land, the payment is approximately \$35 (U.S. Department of Education 1994). Payments to SFUSD from this program are outside of the District's State-imposed revenue limit, meaning that the revenues represent a net increase in funds available for District operations.

Table 5.7 details the estimates of potential Impact Aid Program payments for each Presidio reuse alternative. The table allocates the total number of Presidio children attending public school, as calculated in Table 2.4, among the various categories discussed above. Table 5.7 allocates children between military housing and other Presidio housing according to the proportion of all housing units (excluding guest housing units) allocated for each in Table 9.3. In other words, if the plan allocates 60 percent of the resident housing for military use, Table 5.7 assumes that 60 percent of the total public school enrollment will come from military dependents. After determining the number of school children living in military housing, Table 5.7 then estimates the number of military children who would be enrolled in special education. This is accomplished by assuming the same ratio of special education children to regular education children as that reported by the U.S. Department of Education for the Presidio in 1990-1991. According to the Department of Education, just under eight percent of the Presidio military dependents were enrolled in special education (U.S. Department of Education 1994). Finally, the table calculates the potential Impact Aid Program payments by multiplying the number of children in each category by the appropriate per pupil reimbursement rates.

The U.S. Department of Education has proposed statutory changes that could substantially modify the Impact Aid Program and the amounts of payments that would be received; however the ultimate outcome of the proposed changes is not known at this

time. While the analysis contained in this Chapter is based on current program guidelines, future reimbursements to the school district may be reduced or otherwise vary from the estimates contained herein due to possible changes in program guidelines which could occur along with program reauthorization. Independent of the program reauthorization process, the amount of funds available for this program each year also depends on Congressional appropriations. Thus, since different factors can change the amount of money ultimately provided to SFUSD, the estimates contained in this Chapter are provided for comparative purposes only. This analysis does not account for potential Impact Aid payments to SFUSD due to students who do not live on federal property, but attend public school in San Francisco and whose parents work at the Presidio. The analysis excludes this subgroup of students because the payments are relatively small (\$35 per student per year) and it is more difficult to develop a reliable estimate for this subgroup.

In October of 1993, the voters of San Francisco approved a permanent one-fourth cent sales tax for San Francisco schools. This tax is collected on retail sales made within San Francisco, and distributed to SFUSD and Community College. As with revenues from the Federal Impact Aid Program, the revenues from this source are in addition to the revenues to which the SFUSD is entitled each year under the revenue limit established by the State Department of Education. To determine the estimated sales tax impact to the San Francisco schools, total retail sales estimated in Chapter VII of this report are multiplied by 0.25 percent.

Table 5.7: Estimate of Federal Impact Aid Program Payments to San Francisco Unified School District

Category of Student	Alt. A, Year 2000			Alt. B, Year 2000			Alt. C, Year 2000			Alt. D, Year 2000		
	Percent of Housing	Students	Payment in Lieu of Tax	Percent of Housing	Students	Payment in Lieu of Tax	Percent of Housing	Students	Payment in Lieu of Tax	Percent of Housing	Students	Payment in Lieu of Tax
Students Living in Military Housing (a)	82%	315	\$236,058	13%	60	\$44,963	15%	62	\$46,462	75%	321	\$240,554
Students Living in Military Housing (Special Education) (b)	-	25	\$31,223	-	5	\$6,245	-	5	\$6,245	-	25	\$31,223
Students Living in NPS or Presidio Employee Housing	18%	69	\$51,708	87%	401	\$300,505	85%	352	\$263,785	25%	107	\$80,185
Not Residing on Federal Land w/ Federal employee parent	-	N/A	N/A	-	N/A	N/A	-	N/A	N/A	-	N/A	N/A
Total	100%	384	\$318,989	100%	461	\$351,713	100%	414	\$316,492	100%	427	\$351,962

Category of Student	Alt. A, Year 2010			Alt. B, Year 2010			Alt. C, Year 2010			Alt. D, Year 2010		
	Percent of Housing	Students	Payment in Lieu of Tax	Percent of Housing	Students	Payment in Lieu of Tax	Percent of Housing	Students	Payment in Lieu of Tax	Percent of Housing	Students	Payment in Lieu of Tax
Students Living in Military Housing (a)	64%	130	\$97,421	13%	60	\$44,963	59%	60	\$44,963	79%	320	\$239,805
Students Living in Military Housing (Special Education) (b)	-	10	\$12,489	-	5	\$6,245	-	5	\$6,245	-	25	\$31,223
Students Living in NPS or Presidio Employee Housing	36%	73	\$54,705	87%	401	\$300,505	41%	42	\$31,474	21%	85	\$63,698
Not Residing on Federal Land w/ Federal employee parent	-	N/A	N/A	-	N/A	N/A	-	N/A	N/A	-	N/A	N/A
Total	100%	203	\$164,615	100%	461	\$351,713	100%	102	\$82,682	100%	405	\$334,726

Notes:

(a) Students Living in Military Housing are estimated by multiplying the percentage of all housing (excluding guest housing) allocated to military use (Table 9.3) by the total number of students (Table 2.4).

(b) Estimated percentage of students living in military housing in special education = 7.93% Equal to percent of 1990-1991 Presidio military dependents in special education (U.S. Dept. of Education, 1994). Special Education students are a subset of students living in military housing.

Federal Impact Aid Payments	Per Student
Payment for Residents of Military Housing	\$749.39
Additional Payment for Special Education Students Living in Military Housing	\$1248.92
Payment for Residents of NPS or Presidio Employee Housing	\$749.39
Payment for non-residents of Federal Land w/ Federal employee parent	\$34.50

Sources: U.S. Department of Education, National Park Service, Bay Area Economics.

2. Impacts

Following are results of the calculations of potential Impact Aid Program payments and special sales tax revenues to the San Francisco Unified School District and Community College under each of the reuse alternatives.

a) Alternative A

Under Alternative A, if current guidelines for the Federal Impact Aid Program apply, funds allocated to the San Francisco Unified School District as reimbursement for pupils living at the Presidio would total approximately \$319,000 in 2000 and would drop to approximately \$165,000 in 2010, due to a reduction in the number of occupied housing units at the Presidio. This is significantly less than the \$587,000 generated by the Presidio in the 1990-1991 school year due to a reduction in the number of Presidio school children expected to enroll in San Francisco public schools.

The School District's sales tax revenues from Presidio retail sales would be approximately \$49,000 in 2000, and \$63,000 in 2010.

b) Alternative B

Under Alternative B, if current guidelines for the Federal Impact Aid Program apply, funds allocated to the San Francisco Unified School District as reimbursement for pupils living at the Presidio would total approximately \$352,000 in both 2000 and 2010. Of the four reuse alternatives, this alternative would generate the greatest number of school children by the year 2010, thus generating the largest Impact Aid Program payments. Nevertheless, Impact Aid Program payments under this alternative would still be approximately \$235,000 less than the Presidio generated in the 1990-1991 school year.

Sales tax revenues would be approximately \$45,000 in 2000 and \$62,000 in 2010.

c) Alternative C

Under Alternative C, if current guidelines for the Federal Impact Aid Program apply, funds allocated to the San Francisco Unified School District as reimbursement for pupils living at the Presidio would total approximately \$316,000 in 2000 and would drop to approximately \$83,000 in 2010, due to a reduction in the number of occupied housing units at the Presidio.

Sales tax revenues would be approximately \$44,000 in 2000 and \$54,000 in 2010.

d) Alternative D

Under Alternative D, if current guidelines for the Federal Impact Aid Program apply, funds allocated to the San Francisco Unified School District as reimbursement for pupils living at the Presidio would total approximately \$352,000 in 2000 and would drop to

approximately \$335,000 in 2010, due to a slight reduction in the number of occupied housing units at the Presidio.

Sales tax revenues would be approximately \$54,000 in 2000 and \$67,000 in 2010.

VI. MARKET OVERVIEW OF NON-PROFIT ORGANIZATIONS

This Chapter provides an overview of the "market" arising from non-profit organizations that may seek to obtain space at the Presidio. The research and findings contained in this Chapter are limited in scope, and should be considered as preliminary. The research for this Chapter was conducted in 1992 and was used to help gain an understanding of the potential depth of the non-profit market, the needs of different types of non-profits that might wish to locate in the Presidio, and the experience of other facilities that have marketed to the non-profit tenants.

The following describes the nature of non-profit organizations in San Francisco and the greater Bay Area, a limited telephone survey of respondents to the Call for Interest, and several operating models which have served to attract non-profit organizations to other Bay Area facilities.

A. Methodology

1. Approach to the Market Overview Research

The NPS, in conjunction with the public input and various consultants' assistance, has formulated a concept for the Presidio which involves renting space in a multitude of office, industrial, and residential structures to organizations with educational, environmental, or world peace purposes. This concept, which dedicates the Presidio to becoming a center for global change, has generated a great deal of interest from a wide range of universities, research institutions, and local and national organizations. To formally document interest and encourage creative proposals, the NPS issued a Call for Interest in the Summer of 1992. This process yielded over 400 responses, which have categorized and profiled in a final *Summary of Responses to the Presidio Call for Interest* (NPS 1993) available from the Presidio Project Office.

Most of the kinds of organizations targeted by the criteria set forth by NPS will likely be non-profit; that is, they will not be commercial ventures seeking profits. This supposition is generally borne out by the status of organizations responding to the Call for Interest. The Call for Interest requested information on the needs and capabilities of each organization, as well as their program's purpose.

Since the Presidio's operation as a National Park will incur substantial costs, both for capital improvements and operating expenses, the ability of potential tenants to pay rents and cover "up front" building rehabilitation is critical. Unfortunately, many entities that fit the purpose criteria set forth by the NPS seek to minimize their rent expenses, and sometimes need some form of public subsidy just to meet their overhead costs (especially arts organizations). Furthermore, many non-profit organizations have limited access to capital for "up front" capital improvements such as those that will be needed at the Presidio. While rent concessions in the form of foregone rent may allow some groups to rapidly or gradually improve space, this scenario may not be practical for the amount of space (in excess of 1 million square feet excluding the hospitals and research facility) that the NPS will make available to the marketplace in 1994.

To begin the refinement of the concept of renting space to the aforementioned types of organizations, a market overview has been conducted. This brief overview is not

intended to be a complete market analysis, but seeks to provide preliminary information to address the following questions:

1. What does the City and Regional non-profit base look like in terms of numbers, size, lease terms, and prospects for future growth?
2. What are the space and locational needs of potential tenants?
3. How do the respondents to the Call for Interest fit within the economic constraints of the Presidio?
4. Are there phasing and/or planning implications arising from the needs of the marketplace?
5. Does the information from the above demonstrate likely market support for the space present in the Presidio? What does this mean for the financial outlook of the Park?

2. Profile of the Locally-Based Non-Profit "Market"

The resources available at the Foundation Center, a non-profit organization resource center and library located in San Francisco, were utilized to research the size of the locally-based non-profit market. Appendix B contains a listing of the resource materials that are available there and in other locations; future solicitation efforts for the Presidio may be able to use these materials.

According to the Yearbook of California Charitable Organizations (data provided by the Registry of Charitable Trusts, an office of the Attorney General with which all California non-profit organizations must register), there are approximately 1,115 non-profit organizations located just in San Francisco. This number was estimated based on a listing by zip code, taking just those zip codes designated "San Francisco" (i.e., 94101 through 94143). A brief review of these organizations indicated that about 260 of them are foundations (including medical research and social service) or appear to have environmental, educational, or international affairs purposes. Another 120 organizations appear to be arts-related. It should be noted that this group of potential tenants for the Presidio includes organizations already located at Fort Mason as well as many of the organizations which responded to the Call for Interest.

Another source, entitled *Clubs, Organizations, and Associations: A Guide to Getting Involved* (San Francisco Chamber of Commerce 1992), lists a smaller number of organizations than the source described above, and includes types of organizations not included in the Yearbook of California Charitable Organizations. A brief review of this directory yielded approximately 200 organizations which might fit the purpose criteria set forth by the NPS (categories labeled Arts & Letters, City & Urban, Conservation, Education, Historical, International, Research/Science, and Service). Some of an additional 74 organizations from the categories of Women and Business may also fit the NPS goals.

Beyond San Francisco, the greater Bay Area contains numerous non-profit organizations which represent a potential pool of tenants for the Presidio. According to Information Marketing Services, the data base supplier to the National Directory of Non-Profit Organizations, there are 7,500 non-profit organizations listed in their data base for the

Bay Area; about 4,500 of these have incomes in excess of \$100,000 per year. This threshold might be considered at least a first-cut criteria for solicitation purposes; organizations with budgets under \$100,000 are assumed to not need rented space and to be unable to support rent payments at the Presidio.

The Institute for Non-Profit Organization Management at the University of San Francisco has a computerized data base of non-profit organizations. The database includes information about location, revenues and SIC code classifications for each organization. The database includes 5,643 organizations registered as non-profit organizations by the California Secretary of State and as tax exempt by the IRS. On the national level, there are several sources for information regarding non-profit organizations, their addresses, budget size, purpose, etc. These sources are documented in Appendix B, and may prove useful for future solicitations of tenants at the Presidio.

In conclusion, information regarding budget, purpose, funding sources, and location appears to be readily available, both on a local and national level. (See descriptions of resources listed in Appendix B.) Unfortunately, however, information on employment levels by organization could not be obtained for this overview.

3. Survey of Respondents to Presidio Call for Interest

In order to obtain first-hand information about the types of organizations that might be attracted to the Presidio, their space needs, and their perception of "market rents," telephone interviews were conducted with ten organizations who had previously responded to the Call for Interest. The findings from the limited sample of ten organizations should be considered preliminary; the number of organizations contacted represents less than three percent of the 400 organizations responding to the Call for Interest.

Organizations were selected in consultation with NPS Program Development staff. The very largest respondents, such as universities and research institutes, were not interviewed for this memorandum because on-going discussions with them are being held. Rather, research for this overview focused on the "second tier" of organizations which appeared to have well-conceived proposals, sufficient budgets (as determined by NPS staff), and already rented or owned space in the Bay Area. The following organizations were interviewed (note: if the name of the sponsor is different than the name of the proposed tenant group, the sponsor name is given in parentheses):

1. Cartoon Art Museum
2. Sierra Club
3. Sierra Club Legal Defense Fund, Inc.
4. International Institute for Community Service (East Bay Conservation Corps)
5. The Experiment in International Living
6. The Exploratorium
7. San Francisco Multi-Cultural Community Campus (United Jewish Community Centers)
8. The Center for Urban Health (Western Consortium for Public Health and U.C. Schools of Public Health at UC Davis Extension, UCB, UCLA)

9. The Tides Foundation
10. The Energy Foundation

A summary of the interview results is presented in Table 6.1. To respect the confidentiality of data provided to Bay Area Economics, the current rent information and other interview results are not linked to any particular respondent, with the exception of the Exploratorium.

B. Findings

1. Current Rent Payments and Lease Terms

Current rent payments and lease terms were requested in each interview under the premise that this data suggests the "market" rent levels that these types of organizations would be willing, and presumably able to pay at the Presidio.

As shown in Table 6.1, rents range from zero (for the Exploratorium, which leases space for one dollar per year from the City of San Francisco) to \$1.40 per square foot per month on a triple net (NNN) basis. Two of the respondents pay about \$0.65 per square foot per month, two pay about \$1.05, and four pay between \$1.06 and \$1.40. One other respondent owns its facilities and does not pay any rent.

Excluding the Public Health Service hospital, the respondents are requesting a total of about 290,000 square feet of space; however, it is important to note that this amount includes 150,000 square feet for the Exploratorium, which does not pay any rent for its current facility. Thus, it is difficult to predict what rent level would be considered acceptable to the Exploratorium, an otherwise well-suited and very interested potential tenant.

Excluding the Exploratorium and the respondent interested in the hospital, a weighted average of NNN rents based on the 141,000 square feet of space requested and current rents paid by respondents at other facilities was calculated. Based on these assumptions, the indicated "market" rent for these respondents is \$1.06 per square foot per month.

2. Locational Criteria

Table 6.1 provides comments received regarding disadvantages the Presidio has for each respondent with respect to its own program needs. As shown, the lack of public transit is a major concern; every potential tenant with the exception of the Exploratorium (which is already located adjacent to the Presidio) talked about the lack of public transit. It is assumed that Presidio tenants with large programs or overnight guests will contract privately for on-demand shuttle services to serve their visitors.

The respondents were also asked about other spaces they might be considering (e.g., competitive office supply) as well as the general criteria they consider when locating space. Most of the respondents were not considering locations other than the Presidio; however, several implied that they would not choose to move to the Presidio if rental

rates were too high. Regarding general locational criteria, responses were limited to availability of public transit, rental rates, and, in one case, foot traffic for a planned bookstore.

3. Conference Center Demand

The responses regarding interest in a conference center or meeting space facility were some of the most definitive of the entire interview. Eight out of the ten organizations expressed interest in holding conferences or other kinds of meetings, with at least 30 meetings with a total of almost 50,000 attendees expected on an annual basis. This strong demand for meeting space suggests that facilities should be designed to serve the Presidio tenants in a cost-effective and convenient manner.

4. Housing and Lodging Demand

In contrast to the strong demand for meeting space, demand for housing linked to programs or for staff appears to be very weak for potential tenants relocating from elsewhere in the Bay Area. Only two organizations foresaw any demand for housing, and a total of two units of housing were requested. However, the information on housing demand by potential tenants was only obtained from currently existing Bay Area non-profits and therefore may not be indicative of all potential tenants. Demand for housing units by organizations moving from outside the Bay Area, or new non-profits might be stronger.

Demand for dormitory, hotel, or other forms of temporary overnight lodging appeared to be moderately strong. Six of the ten organizations stated that they would desire this type of facility within the Presidio. Overnight lodging in dormitories and/or other forms of low-cost rooms could make sense as part of the meeting/conference facilities serving these kinds of non-profit organizations and other potential users.

5. Timing of Presidio Tenancy

An important aspect of the responses to the interviews was the timing of Presidio occupancy. Four of the respondents were prepared to occupy space between late 1993 and mid-1994. However, four other respondents were not planning to come to the Presidio until 1995 or 1996. One respondent, the Exploratorium, seemed to want space now on a temporary basis to assist with renovation of their existing facility, as well as more permanent space in 1995.

These findings have direct implications for the NPS in terms of estimating the timing of future rent revenues. They illustrate that even if demand for space is strong at rent levels mirroring current "market" conditions, the potential tenants will be on a staggered schedule stretching over several years.

Table 6.1: Summary of Call for Interest Respondents' Follow-Up Interviews*(Organizations' Names Omitted to Preserve Confidentiality)*

Organization	Current Monthly Rent (per Sq Ft)	Lease Terms	Adjusted Monthly Rent (NNN) (a)	Proposed Space in Presidio (in Sq Ft)	Presidio Disadvantages	Demand For Housing	Annual Demand For Conference	Timing	Comments
1	\$1.83	Full serv, inc pkg, CP	\$1.19	25,000	Toxics, transit	Dorms for Interns	3 X 100 people	Mid-1995	Wants lower rents than current Worried Presidio not ready in time Interested and able to do capital imps
2	\$0.97	Full serv, yr to yr lse	\$0.63	6,000 + housing	Fog, transit	Dorms, Lodging	5 - 10 X 30 people	Sept 1994	Hard to fund cap imps, want them phased-in Suggest Presidio give "fall-back" financing
3	\$1.58	Full serv, inc TI's, no CPI	\$1.03	80,000	Location, transit	None	2 X 300 people	Late 1995	Want food service, may come sooner if rents low Can make "some" capital improvements
4	\$1.71	Full serv, inc TI's	\$1.11	15,000 + warehouse	Transit	1 unit + lodging	Maybe	Mid-1996	Able to make cap imps Inexpensive rents may accelerate move-in
5	\$1.00	Full serv, no CPI	\$0.65	NA	Transit, rehab	No units - maybe lodging	Maybe	Late 1993	Wants lower rents than currently pay
6	\$0.57	NNN	\$0.57	NA - new program	NA	Maybe	4 X 100 + classrooms	Late 1993	Hard to pay cap imps but has expertise in-house. Sensitive to rent issue (new joint venture)
7 (Exploratorium)	None	NA	None	150,000 whse, off, res	Access to Presidio	1 unit + lodging	6 X 300 people or less	Now (temp) & 1995	Presidio is great for expansion to make campus w/existing fac. Would like lodging for visitors (eg school children)
8	\$2.15	Full serv, 3% esc.	\$1.40	5,000	Transit	Dorms, lodging	1 X 1,500 + 1 or more X 200	1995	New joint venture program. Current rents reflect university consortium in Class A space
9	\$1.06	NNN	\$1.06	10,000	Transit	Lodging	5 X 50 people max	ASAP	Not sure about cap imps, wants to move ASAP
10	NA	Own all space	NA	Public Health Service Hospital	Transit	No	2 X 200 + w/others	New program	Considering other location. Would seek public \$ for cap imps, used to owning space. Able to raise own \$ to own

a) Reported rents were a mix of full service and triple-net (NNN). All rents adjusted to NNN by subtracting estimated expense ratio of 35 percent of full service.

Source: Bay Area Economics.

6. Ability to Complete Capital Improvements

The responses about willingness and financial capability to make capital improvements to buildings at the Presidio yielded mixed results. Some of the respondents appeared to be fully prepared and able to undertake such improvements, while others hesitated, expressed concern, or saw this requirement as a potential stumbling block.

7. Market Demand Experienced at Similar Facilities

In order to preliminarily gauge the depth of market demand by non-profit organizations for Presidio space, three other facilities with similar kinds of tenants were contacted to discuss their view of demand as well as the particulars of their lease rates, lease terms, and overall management structure. The Fort Mason Center, the Business Manager for the Marin Headlands, and a representative of Preservation Park in Oakland were interviewed by telephone.

Marin Headlands. The Marin Headlands, currently managed by the GGNRA, contains several tenants including the Headlands Institute, the Bay Area Discovery Museum, the Headlands Center for the Arts, and space for YMCA retreats. Tenants must have interpretive or educational purposes. Tenants do not pay rent; however, they do maintain their buildings and pay for capital improvements, as negotiated on a case-by-case basis through "Cooperative Agreements" (e.g., special type of agreement used by NPS).

At the present time, there are numerous vacant buildings with spaces as large as 60,000 square feet available. Absorption of these spaces appears to be slow; Mr. Garey Coatney of GGNRA stated that there have been very few serious inquiries.

Fort Mason. This 300,000 square foot complex, currently operated by the Fort Mason Foundation, is occupied by about 50 arts-related, environmental, and cultural organizations. Tenants must be non-profit organizations. Tenants are responsible for their own utilities and janitorial services, and the Foundation is responsible for common area expenses and maintenance. Tenants are also responsible for tenant improvements; however, the NPS will give rent credits for certain improvements. It should be noted that, according to Jerry Edelbrock of the Foundation, the structures at Fort Mason were in relatively good condition when the complex was taken over by the Foundation.

Demand for space at Fort Mason appears to be strong; 50 to 100 organizations have expressed interest in coming to the facility. According to the Foundation, initial lease-up occurred over a three year period.

Preservation Park. This complex consists of about 45,000 square feet of space in several fully restored historic residential structures located in Downtown Oakland. At the present time, about 3,500 square feet of space is available, resulting in a vacancy rate of about eight percent. According to Susan Hirshen, Project Manager, the desired mix of the complex is half non-profit tenants, and half for-profit businesses. The rent structure for Preservation Park is two-tiered, to reflect this goal.

For the non-profit tenants, the desired mix of type of organization is 25 percent environmental, 25 percent social service, 25 percent cultural, and 25 percent youth/education. Interestingly, according to the Project Manager, the environmental non-profit category has been the most difficult goal to meet. In contrast, about two to five calls per week come from interested social service organizations.

C. Conclusion

Within the Bay Area, there is a large universe of potential non-profit tenants, including approximately 4,500 organizations with incomes of at least \$100,000 per year. At the state and national levels, the pool of potential non-profit tenants is much larger. These organizations can be identified through several different sources of listings for non-profits. Information contained in the databases can be useful to help target future Presidio marketing efforts.

Based on information from follow-up interviews with ten Call for Interest respondents, these organizations currently pay weighted average rents of approximately \$1.06 (NNN) per square foot per month. Current rents reported by these organizations ranged from zero to \$1.40 per square foot. In addition to seeking affordable rents, a major concern of these organizations was the current lack of public transit access to the Presidio; nevertheless, few organizations were actually considering other locations.

Among the ten organizations interviewed, the demand for conference centers appeared strong, while the demand for guest lodging was moderate and the demand for staff housing was weak. The interviewed organizations indicated a range of desired dates for Presidio occupancy spanning from late 1993 to 1996, with varied abilities to undertake and finance capital improvements.

A separate survey of Bay Area facilities that market their space to non-profit tenants indicates that Fort Mason, with an emphasis on arts, environmental, and cultural organizations experiences strong demand; the organization maintains a waiting list for space. Demand is weaker for space in the Marin Headlands. In Preservation Park (Oakland), demand for office space from social service organizations appears strong while the project has had more difficulty meeting its target for environmental non-profits.

VII. FOOD, LODGING, AND RETAIL REVENUE PROJECTIONS

A. Methodology

The methodology for this Chapter was designed to estimate visitor expenditures at the Presidio, to determine whether the levels of use under the proposed alternatives could support the potential operations, and to estimate revenue projections of conference facilities, food and beverage, and retail concessions. To this end, the future revenues of each component were estimated and the resulting dollars per square foot for each alternative compared with industry standards.

A combination of industry factors and Presidio land use and population data were used to estimate future revenues for each component. These are conservative estimates since the analysis considered concessions occupying entire buildings. Smaller concessions that may service tenants on a more limited scale were not included. The method for performing the analysis for each alternative consists of four steps, summarized as follows:

1. Estimating Users

Various data sources were used to estimate the number of residents, employees, day visitors and overnight visitors. This data included transportation mode use, employee and resident estimates, and anticipated overnight accommodations in barracks, dormitories, and guest houses.

2. Estimating Visitor, Resident, and Employee Expenditures

The user markets were divided into four primary categories - residents, employees, visitors, and overnight guests - to estimate annual user spending at the Presidio. Visitors include all visitors to the Presidio, including those from within and outside the region. Visitor estimates were provided by the NPS transportation consultant (Peccia & Associates 1994). The revenues associated with food and beverage, retail, and overnight accommodations were determined by applying average expenditures for each market segment.

Estimated annual spending for residents was determined by taking the aggregate amount of retail, food and beverage spending reported to the State Board of Equalization for the City of San Francisco, which in 1991 was reported as approximately \$2.9 billion. Subtracting out the reported spending by San Francisco visitors (approximately \$1.9 billion) for the same revenue categories during the same period resulted in an adjusted amount of \$1 billion spent by San Francisco residents (San Francisco Convention and Visitors Bureau 1992). The adjusted total was divided by the total number of residents in San Francisco to derive a per capita annual expenditure of approximately \$1,500.

This analysis assumes that Presidio residents will spend approximately 50 percent of their retail, food, and beverage dollars in the stores and restaurants located in the Presidio and the remaining 50 percent outside the Presidio. Thus, the estimated average annual spending per resident in the Presidio retail, food and beverage outlets would be \$750. While it is difficult to know at this time precisely how much of their expenditures Presidio residents may make within the Presidio, this assumption is not critical to the analysis since residents will contribute a relatively small proportion of total Presidio sales. Based on historical San Francisco consumer spending patterns data, it was

estimated that the residents would spend 43 percent of their dollars on food and beverage and the remaining 57 percent on retail items.

Estimated annual spending for employees was calculated using the average annual expenditure of \$1,600 per office worker (for downtown locations with limited retail) as a foundation (International Council of Shopping Centers 1988). Since the Presidio is within five minutes of the Marina District, it was estimated that 50 percent of employee spending would occur on the Presidio and 50 percent in the Marina district (a portion of this figure might actually be spent in the Richmond district or in other nearby neighborhoods). Therefore, estimated average annual spending per employee in the Presidio retail, food, and beverage outlets would be about \$800. Office worker retail spending habits reflect that 55 percent of spending occurs on food and beverage and the remaining 45 percent on retail items.

Daytime visitor spending habits were estimated by comparing several concessions in other national parks to determine average spending by visitors on retail, food and beverage items. Based on the data collected, spending per visitor was estimated to be \$2.50 at the various retail, food, and beverage outlets. It was also estimated from the comparisons that 30 percent of the dollars spent by visitors would be on food and beverage and 70 percent on retail merchandise.

The last market segment, lodging, was determined by multiplying the potential guest beds by the current occupancy and room rates for limited-service hotels in San Francisco. Appendix D contains a listing of the Presidio guest accommodations, and estimates of guest capacity and number of guest rooms used. The average daily rate was estimated by taking the 1989 estimated average daily spending on accommodations by San Francisco visitors (Economics Research Associates 1989) and adjusting them into 1993 dollars (three percent compounded annually). This resulted in a revenue assumption of \$68 per night per occupied room for Presidio guest lodging facilities. The occupancy percentage was derived from 1992 ratios which reported a 64 percent occupancy rate for limited-service hotels (Arthur Anderson 1992). Projected occupancy rates for the Presidio were increased from the year 2000 to the year 2010 by the same percentage as the visitor estimates during the same period. The guest lodging revenue calculations represent estimates of potential room revenues assuming that guest lodging operators renovate and appoint available facilities to a level comparable to other facilities within the marketplace. The probability of achieving these revenues is dependent on the suitability of the spaces for the proposed uses and the market conditions that prevail in a given time period. Retail, food, and beverage spending were not included in the lodging figures because they have been accounted for in the daytime visitor spending calculations.

Presidio visitors will also likely contribute to sales in locations outside the Presidio; however, because this analysis concentrates on the potential support for proposed Presidio retail, food and beverage, and lodging facilities, it does not estimate the impacts on non-Presidio businesses from Presidio visitors who also visit other Bay Area attractions.

3. Comparison With Industry Data

Expenditures within the Presidio were compared to industry data to determine whether the projected levels of use could support operations of retail, food, and beverage concessions in each alternative. Figures were derived using the square footage allocated for each revenue component under each alternative and the dollar per square foot figures as a measure of capacity. The dollar capacity per square foot was compared to that of

existing concessions in other national parks in addition to data from industry operations reports. It was assumed that the sales revenues per square foot would support operations if they ranged between \$150 - \$300 for merchandise and \$100 - \$325 for food and beverage outlets. Additionally, a range of \$4,125 - \$6,500 per seat was used as an acceptable level of sales for restaurant uses (National Restaurant Association 1992). These ranges were used to assess the performance of the identified Presidio food and beverage concessions.

4. Estimating Revenues Per Square Foot

Revenues were allocated on a square footage basis, and sales were distributed by the square footage of each building and its proposed uses. Each of the alternatives vary in size and sales based on a combination of visitor, resident, and employee estimates and proposed overnight accommodations. The revenue estimates for each alternative, provided in Appendix C, are expressed in 1993 dollars.

B. Impacts

1. Alternative A - Resident, Employee, and Visitor Expenditures

Given the expected number of people using the Presidio in the future, the proposed alternatives as currently outlined are projected to support feasible levels of service operations. Based on the analysis, Alternative A would support approximately \$26.2 million of revenues in the proposed square footage allocated for the visitor services and overnight lodging during the year 2000. These figures may potentially increase to over \$38.8 million by the year 2010 and continue at an acceptable level of volume for both retail and food and beverage operations based on the existing parameters.

Table 7.1: Sales Summary for Alternative A

	2000	2010
Total Food and Beverage Sales	\$6,597,000	\$8,560,000
Total Retail Sales	\$12,934,000	\$16,706,000
Total Guest Room Revenues	\$6,640,000	\$13,565,000
Total Revenues	\$26,171,000	\$38,831,000
Sales by Square Footage		
Food and Beverage	\$143.41	\$125.51
Retail	\$249.08	\$223.88

Alternative A - Conclusion

Alternative A would generate approximately \$26.2 million in the year 2000 and \$38.8 million in the year 2010 in visitor service and overnight lodging revenues. The resident, employee, and visitor expenditures at the Presidio would constitute about 2 percent of approximately \$1.9 billion spent by San Francisco visitors. Presidio expenditures would contribute a small portion of regional visitor expenditures.

2. Alternative B - Resident, Employee, and Visitor Expenditures

Alternative B would generate approximately \$20.6 million in the year 2000 and approximately \$29 million in the year 2010 in visitor service and overnight lodging revenues. Sales volume per square footage was below or at the lower end of the acceptable range for retail operations in 2000, and at the low end of the acceptable range for food and beverage operations. By 2010, the retail sales volume would reach the lower limit of the acceptable range, while food and beverage sales volumes would climb slightly higher in the acceptable range.

Table 7.2: Sales Summary for Alternative B

	2000	2010
Total Food and Beverage Sales	\$ 6,618,000	\$8,950,000
Total Retail Sales	\$11,230,000	\$15,866,000
Total Guest Room Revenues	\$2,764,000	\$4,232,000
Total Revenues	\$20,612,000	\$29,048,000
Sales by Square Footage		
Food and Beverage	\$101.79	\$137.66
Retail	\$106.42	\$150.35

Some additional services at Crissy Field may be advantageous to visitors and increase future revenues for the Presidio retail and food and beverage concessions. Additional visitor services would be analyzed for Crissy Field, as tenants are established.

Alternative B - Conclusion

Alternative B would generate approximately \$20.6 million in the year 2000 and just over \$29 million in the year 2010 in visitor service and overnight lodging revenues. The resident, employee, and visitor expenditures at the Presidio would constitute approximately 1.5 percent of approximately \$1.9 billion spent by San Francisco visitors. Presidio expenditures would contribute a small portion of regional visitor expenditures.

3. Alternative C - Resident, Employee, and Visitor Expenditures

Alternative C would generate approximately \$20.8 million in the year 2000 and approximately \$30.8 million in the year 2010 in visitor service and overnight lodging revenues. Alternative C was below the acceptable range for food and beverage operations, which may require adjustment in services, while in the acceptable range for retail operations.

Table 7.3: Sales Summary for Alternative C

	2000	2010
Total Food and Beverage Sales	\$6,188,000	\$7,200,000
Total Retail Sales	\$11,543,000	\$14,352,000
Total Guest Room Revenues	\$3,099,000	\$9,181,000
Total Revenues	\$20,830,000	\$30,733,000

Sales by Square Footage

Food and Beverage	\$78.88	\$91.78
Retail	\$150.77	\$187.47

Some additional services at Crissy Field may be advantageous to visitors and increase future revenues for the Presidio retail and food and beverage concessions. As the NPS develops tenant programs and implements water taxi service for Crissy Field, additional visitor services would be analyzed.

Alternative C - Conclusion

Alternative C would generate approximately \$20.8 million in the year 2000 and approximately \$30.7 million in the year 2010 in visitor service and overnight lodging revenues. The resident, employee, and visitor expenditures at the Presidio would constitute over 1.5 percent of approximately \$1.9 billion spent by San Francisco visitors. Presidio expenditures would contribute a small portion of regional visitor expenditures.

4. Alternative D - Resident, Employee, and Visitor Expenditures

The Presidio would ultimately be able to support the development as currently outlined under this alternative. Based on the assumptions, Alternative D would support approximately \$27.7 million of revenues in the proposed square footage allocated for the visitor services and overnight lodging revenues during the year 2000. The sales volume for both food and beverage operations and retail operations would be below the acceptable range in this time period; however, these figures may potentially increase to just under \$42.5 million by the year 2010 and continue at an acceptable level of volume for both retail and food and beverage operations based on the existing parameters.

Table 7.4: Sales Summary for Alternative D

	2000	2010
Total Food and Beverage Sales	\$7,635,000	\$9,357,000
Total Retail Sales	\$13,878,000	\$17,314,000
Total Guest Room Revenues	\$6,227,000	\$15,801,000
Total Revenues	\$27,740,000	\$42,472,000

Sales by Square Footage

Food and Beverage	\$97.33	\$119.28
Retail	\$139.79	\$174.41

Some additional services at Crissy Field may be advantageous to visitors and increase future revenues for the Presidio retail and food and beverage concessions. As the NPS develops tenant programs and implements ferry service for Crissy Field, additional visitor services would be analyzed.

Alternative D - Conclusion

Alternative D would generate approximately \$27.7 million in the year 2000 and nearly \$42.5 million in the year 2010 in visitor service and overnight lodging revenues. The resident, employee, and visitor expenditures at the Presidio would constitute over two percent of approximately \$1.9 billion spent by San Francisco visitors. These Presidio expenditures would constitute a small portion of regional visitor expenditures.

VIII. HEALTH CARE SERVICES AND MEDICAL RESEARCH

The Presidio includes two health care complexes: (1) the Letterman complex which includes the Letterman Army Medical Center (LAMC) and the Letterman Army Institute of Research (LAIR) plus associated buildings, and (2) the vacant U.S. Public Health Service hospital and associated buildings. Since the facilities are physically separate and the potential reuses are different for each, the facilities, reuse proposals, and impacts will be described separately.

A. Letterman Complex

The Letterman complex primarily is comprised of the Letterman Army Medical Center, an acute care facility opened in 1986 with 550 bed capacity. The building comprises a three floor base with a seven story tower and a total of 445,530 gross square feet. Preliminary estimates of rehabilitation costs for LAMC are \$162 million, which includes substantial improvements for seismic safety and conversion costs. The Letterman Army Institute of Research (LAIR) is a modern medical research facility constructed in 1976. The building has 130,000 square feet of usable laboratory space, 85,000 square feet for animal research, and 70,000 square feet of office space. Estimates for similar rehabilitation of LAIR are \$36.5 million.

In the 60 acres that make up the Letterman complex, in addition to LAMC and LAIR, there are nine family housing units and three dormitories, 14 office buildings, 17 warehouse buildings, a gym and a swimming pool, and two retail buildings.

1. Baseline Condition

For the baseline condition, it is assumed the Army has vacated Letterman Hospital and that the impacts on health care for military staff, dependents, and the Bay Area health care system are assumed to have already occurred because this was covered in the Base Closure Final EIS for the Presidio of San Francisco (USACE 1991). A fully occupied Letterman Army Medical Center building was used as the baseline for some of the other impact analyses, including transportation and employment. For the analysis it is assumed that LAIR is an active research facility. The Public Health Service hospital facilities are also assumed to be inactive and vacant as they have been since the early 1980's.

The impacts of closure of LAMC and LAIR are described in *Base Closure Final Environmental Impact Statement for Presidio of San Francisco* (USACE 1991). That report states:

"Closure of the Presidio will result in one unavoidable significant impact: increased costs of medical care for military retirees and their dependents now served by LAMC. Other socioeconomic impacts, such as loss of economic activity, are not considered significant." (USACE 1991, pp S-8)

This impact would occur before the baseline condition was established. Other socioeconomic impacts determined in the Base Closure EIS as not having a significant adverse effect included:

- Reduced funding of research and training at regional medical schools (see pp 3-16 of Base Closure EIS).

2. Affected Environment

There are 75 acute care hospitals (excluding psychiatric hospitals) in the nine county Bay Area and 14 general acute care hospitals in San Francisco (excluding Letterman). Within San Francisco, the acute care hospitals have 5,733 beds. San Francisco has 41 percent of the total 13,946 beds in the Bay Area according to the State of California Annual Report of Hospitals, 1991. Average Bay Area hospital occupancy in 1991 was 54 percent; in San Francisco it is estimated at 50 percent.

The Bay Area has health care institutions that have national and international reputations. These include the teaching and research hospitals at the University of California, San Francisco and Stanford University. Kaiser Permanente, the largest managed health care organization in the country, is headquartered in Oakland.

San Francisco and the Bay Area both have a severe oversupply of acute care hospital beds. Changing health care practices have resulted in patients being treated on an out-patient basis and reduced the length of time for stays in hospitals. In recent years there have been a number of mergers of hospitals in San Francisco due to economics and the need to provide a full spectrum of research and care options. This follows a nationwide trend toward hospital consolidation. The hospital market in San Francisco is also highly competitive with smaller, independent hospitals being acquired or merged with larger health care organizations. San Francisco also has a long tradition of non-profit hospitals. There are no proprietary hospitals in the City. San Francisco has a shortage of chronic care facilities (Baxter 1992).

San Francisco has a two-decade tradition of constraining hospital expansion through zoning requirements, neighborhood opposition, and certification of need review. In the early to middle 1970's for example, St. Mary's was prevented by the California Supreme Court from using eminent domain to acquire and demolish residences in order to build an office building. Davies Medical Center's plans for a heliport were successfully opposed by the local health planning agency. The University of California, San Francisco (UCSF) was prevented from expanding its Parnassus campus by neighborhood opposition and a "peace agreement" limiting the campus space to 3.55 million square feet, thereby limiting the population of the campus and establishing boundaries for development. UCSF is now conducting a long-range strategic planning process in order to meet future facility needs, particularly for research and training facilities.

In addition to providing health care services, the health care industry is a major employer and contributor to the economy. In San Francisco, hospitals employ over 30,000 people. UCSF is the largest, non-government employer in San Francisco with a staff of over 14,000, and is also a major recipient of federal health research funds. In FY 91 the institution received \$150 million (San Francisco Planning and Urban Research 1991).

3. Potential Reuses

The facilities in the Letterman complex could be reused in a variety of ways. (1) LAMC could be removed and LAIR reused for medical research; (2) LAMC could be reused as a hospital and LAIR reused for medical research; or (3) LAMC and LAIR could be reused for medical research only. The tower of LAMC which contains hospital rooms could also be removed leaving the three story base structure to be reused for medical research; or the entire building could be removed and be replaced with research facilities of

equivalent square footage. (4) LAMC and LAIR could be excised from the boundary and not managed by the Park Service.

Since a reuse proposal has not been selected it is not possible to define the specific impacts of the reuse of the hospitals. Reuse will be determined by a selection process provided by the NPS after the plan is adopted. General impacts are described to indicate the range of possible consequences. Additional analysis would be conducted, as needed, after tenants are selected.

4. Impacts of the Proposed Uses on the Alternatives

This section briefly describes the proposals of each plan alternative for the Letterman complex and summarizes the impacts.

a) Alternative A. Public and Private Partnership (Proposal)

i) Impacts

Under alternative A the Letterman Army Medical Center (LAMC) would be retained or removed and replaced with research space of up to an equivalent amount, and the Letterman Army Institute of Research (LAIR) would be leased to a non-profit partner for reuse as a research facility.

If Letterman hospital is removed, it would not negatively impact the availability of acute-care hospital beds in San Francisco or the Bay Area. This is because there is an oversupply of acute-care beds at the present time (State of California 1991). However, the hospital would not be available for other potential medical uses such as a specialized hospital or as a long-term chronic care facility for which there is unmet demand. The hospital would not be available for reuse by the Navy or the Veteran's Administration who have expressed interest in moving to the facility.

Although the specific impacts of reusing LAIR cannot be identified without a reuse proposal, general impacts are described below to indicate a range of possible consequences. Additional analysis would be conducted after proposals were submitted.

If LAIR is used as a research facility, the new facility would attract scholars, students and external grant funds - building on and expanding San Francisco's significant position in medical research. This would increase the potential for employment gains and increased economic activity.

The research facility could lead to spin-off companies in the Bay Area with applied applications of basic medical research. For example, two major biotechnology firms have developed as an outgrowth of research done at the University of California, San Francisco in the biological sciences.

Hospitals in San Francisco or national health research institutions would be able to meet some of their needs for medical research facility space. This would enable these institutions to expand their programs of medical research within San Francisco; the facility would help satisfy those needs and would not constitute duplication. Medical or other scientific research programs at LAIR would be easily accessible to nearby complementary facilities. There would also be indirect benefits to patients and to medical science from the research conducted at the facility.

b) Alternative B. Minimum Requirements - Public Sector Enclave

i) Impacts

Letterman hospital and LAIR would be leased to a non-profit organization or the military for continued use as a hospital and research facility. The reuse of LAIR as a research facility would produce impacts similar to those identified for Alternative A. The impacts associated with military reuse are discussed in Alternative D.

If Letterman were used as a hospital and research facility, the impacts would depend on the type of medical care provided, the demand for such services, and whether the health provider is new to the area. If the LAMC tenant is an existing health care institution in San Francisco, the reuse might not significantly add beds to the area's supply if adjustments or reductions were made to the parent institution or the service area for the medical specialty was expanded to clients outside of San Francisco. If the new LAMC does not negatively impact other area facilities then some positive employment impacts would be anticipated. The impacts would depend on the types of medical specialties that the new hospital would include.

There could be negative impacts on other hospitals in San Francisco and the Bay Area if a specialized hospital was developed alone, rather in collaboration with other institutions. If the new facility duplicates health care services already available, this would increase competition for services in an already competitive health care situation. This could lead to higher medical costs and the elimination or further consolidation of other medical facilities. These impacts would be mitigated if the hospital was developed in cooperation with other hospitals with relevant specialties.

c) Alternative C. NPS Management With Boundary Adjustment

i) Impacts

The park boundary would be changed to exclude Letterman hospital and LAIR from the Presidio. The old Letterman hospital complex would remain inside the Presidio boundary. The property would be disposed of by the General Services Administration following government property disposition procedures.

Impacts would be described in a separate EIS prepared as part of the redevelopment process. The impacts would be similar to those described in Alternative A if the facilities were used as a research center. If the military were the reuser, the impacts would be similar to those described in Alternative D.

Legislation would be required to deauthorize LAMC and LAIR from the existing Presidio boundary. If the Letterman complex is excluded from the Presidio, NPS would not be able to control the reuse of buildings. This could be mitigated by applying deed restrictions in the disposition agreements.

*d) Alternative D. Military Reuse**i) Impacts*

Under the Military Reuse Alternative opportunities for park uses would be foreclosed. There are three alternative proposals being considered for military reuse of the Letterman complex including LAIR. These are: 1) Reuse by the U.S. Navy relocating from Oakland, 2) Reuse by the Veterans Administration relocating from its San Francisco hospital at Fort Miley, and 3) Joint Navy - Veterans Administration reuse.

1) U. S. Navy

The U.S. Navy has previously proposed to close its hospital in Oakland which was constructed in 1960. The facility is located within 1,950 feet of the Hayward Fault and 1,450 feet from the Chabot Fault. The facility could sustain significant damage or failure in the event of a serious earthquake. The alternative of building a new Navy hospital in Oakland is considered more expensive than the alternative of transferring to LAMC which also has seismic stability issues. The Navy proposes to reuse LAMC, LAIR, and the other buildings in the Letterman complex, as well as the Wherry housing.

2) Veterans Administration, San Francisco

The San Francisco Veterans Administration hospital at Fort Miley is a 272 bed facility built in 1934. The VA hospital provides primary, secondary, tertiary, and extended care in all major diagnostic and treatment specialties. In addition the San Francisco VA hospital has an extensive research and development program. The VA wishes to transfer all of its operations from Fort Miley to the Letterman complex, maintaining only its psychiatric unit and warehousing at Fort Miley.

3) Joint Navy - Veteran Administration reuse

Another arrangement for the reuse of the Letterman complex is for the Navy and the VA to jointly reuse the facilities. If the Letterman complex were reused by the Navy as a replacement for the Oak Knoll Naval Hospital in Oakland, there would be cost savings to the defense budget of the federal government (as compared with building a new facility). Capital cost (i.e. new construction) and possible operational savings could be realized through the joint operation of the Letterman complex by the Navy and the VA. However, the National Park Service and the domestic budget would not benefit from the leasing of the facility. Cost estimates for facilities by the Navy alone are shown in the following tabulation:

New Navy Hospital, Oakland	\$190 - \$250	million
Navy/Alameda County joint venture	\$215	
LAMC rehabilitation	\$162	

(Note: Hospital capacity and facilities may not be equivalent among the three alternatives.)

If the Letterman complex were reused by the Veterans Administration, there would also be cost savings to the defense budget of the federal government but this would also not be beneficial to the NPS (or federal domestic) budget. The cost of completely renovating LAMC has been estimated at \$162 million by NPS engineers. Renovating the existing VA facility at Fort Miley has been estimated to cost between \$126 and \$134 million. It is

not clear that the capacity and renovations would be fully equivalent between these two cost estimates.

Under Alternative D retired military and dependents would have access to care at a military facility in San Francisco. This would resolve the one unmitigated impact of base closure of the Presidio as reported in the Army's Base Closure Environmental Impact Statement: increased medical costs for retired military and their dependents and survivors. However, active duty personnel and their dependents who formerly used Oak Knoll Naval Hospital would have increased travel distances to obtain health care.

As for negative impacts, the facility would not be available for reuse by other potential users. In addition, military reuse in the GGNRA could be misunderstood by San Francisco residents and visitors since the main focus of the Presidio is to be a national park.

5. Estimated Medical Aid Incidents Requiring Hospital Care

This purpose of this section is to estimate the demand which may be placed upon hospital emergency rooms due to medical aid incidents on the Presidio requiring hospital care. In 1991 there were 279 emergency ambulance runs from Letterman Hospital (USACE 1991). In fiscal year 1992 (September 1991-August 1992) the Presidio Fire Department had 236 medical aid incidents on the Presidio (Jones & Jones 1993). Approximately one-third of these incidents were treated on the scene, and two-thirds required transport to a hospital.

In order to estimate the number of medical aid incidents that would require transportation to a hospital, the following procedure was used:

- 1) The medical incidents requiring transport to hospital was calculated. The estimate is based on the Presidio Fire Department's estimate that one-third of all reported emergency medical incidents are treated on site and two-thirds require transport to a hospital for medical attention. From 9/91 through August 8/92 there were 236 reported medical incidents of which 158 required transport to a hospital.
- 2) Of the 158 requiring hospital care, one-third (52 incidents) were from housing units on the Presidio, and two-thirds (106) were from other locations on the Presidio.
- 3) Forecasts for medical aid incidents from the "other locations" requiring transportation to a hospital were made using the increase of visitors in the year 2000 and 2010 for each alternative. For example, from the baseline year to 2000, visitors are forecast to increase 159 percent for Alternative A. It is assumed that medical incidents would increase at the same rate for locations on the Presidio other than housing.
- 4) Forecasts of the increase in medical aid incidents for housing was made using the change in housing units in each alternative. For example, for Alternative A, the plan proposes a decrease in housing units in 2000 to 96 percent of the current level of units, and a total decrease in 2010 to 38 percent of the current level of units. These percentages were applied to the number of medical aid requests requiring hospital care in the baseline period, FY 1992.

5) The total number of medical aid incidents on the Presidio that will require transport to a hospital is the sum of incidents from housing, plus incidents from "other areas." The number of estimated incidents for 2000 and 2010 are shown in Table 8.1.

a) Impacts

Under all alternatives, the number of increased medical incidents is not considered to be a significant number. Under the preferred alternative, there would be an increase of one medical incident transported to a hospital every fifth day by 2000. By 2010 there would be an increase of one medical incident transported to a hospital every third day. The existing hospital emergency medical care system can adequately provide the needed service. Specific estimates for each alternative are provided below.

i) Alternative A

The total number of medical incidents requiring hospital care is estimated at 231 in 2000. This is an increase by 2000 of 73 incidents over the baseline year, FY 92. In 2010 the total number of medical incidents is 267, an increase of 109 incidents over the baseline year.

ii) Alternative B

The total number of medical incidents requiring hospital care is estimated at 181 in 2000. This is an increase by 2000 of 23 incidents over the baseline year, FY 92. In 2010 the total number of medical incidents is 250, an increase of 92 incidents over the baseline year.

iii) Alternative C

The total number of medical incidents requiring hospital care is estimated at 196 in 2000. This is an increase by 2000 of 38 incidents over the baseline year, FY 92. In 2010 the total number of medical incidents is 222, an increase of 64 incidents over the baseline year.

iv) Alternative D

The total number of medical incidents requiring hospital care is estimated at 228 in 2000. This is an increase by 2000 of 70 incidents over the baseline year, FY 69. In 2010 the total number of medical incidents is 277, an increase of 119 incidents over the baseline year.

Table 8.1: Estimate of Medical Emergencies Requiring Hospital Care at the Presidio, 2000 and 2010

Alternative and Year	Number of Visitors (millions/year)	Estimated Visitors as Percent of Baseline	Number of Medical Transports Due to Visitors	Number of Housing Units	Available Housing Units as Percent of Baseline	Number of Medical Transports Due to Housing	TOTAL Medical Transports To Hospital	Increase of Transports Over Baseline
Baseline Year (FY '92)	3.7	n.a.	106	1,192	n.a.	52	158	n.a.
Alternative A								
Year 2000	6.5	176%	186	1,034	87%	45	231	73
Year 2010	8.4	227%	241	602	51%	26	267	109
Alternative B								
Year 2000	4.5	122%	129	1,181	99%	52	181	23
Year 2010	6.9	186%	198	1,181	99%	52	250	92
Alternative C								
Year 2000	5.2	141%	149	1,079	91%	47	196	38
Year 2010	7.3	197%	209	307	26%	13	222	64
Alternative D								
Year 2000	6.2	168%	178	1,140	96%	50	228	70
Year 2010	8.0	216%	229	1,100	92%	48	277	119

Sources: Peccia and Associates, National Park Service.

B. U.S. Public Health Service Hospital

The U.S. Public Health Service hospital (PHSH) area is 36.5 acres and includes the following facilities: the hospital which is currently vacant, residential buildings containing two dorms and 11 housing units, four office buildings, and three warehouse buildings. The six story hospital was built in 1932 with two wings added in 1951. The PHSH is currently vacant and outside the boundaries of the GGNRA.

The NPS plan, under the proposed Alternatives A and D, recommends reuse of the facility as a residential conference facility or educational center. Under Alternatives B and C, the PHSH is outside the GGNRA boundary and would be disposed of as surplus Federal property by the GSA.

1. Alternative A. Public and Private Partnership (Proposal) Alternative D. Military Reuse

i) Impacts

The PHSH complex would be developed by a non-profit partner as a residential/educational and conference center. Educational and community service proposals have been received for the reuse of this site. A number of options for reuse and their impacts are also described in *Base Closure Final Environmental Impact Statement for Presidio of San Francisco* (USACE 1991).

The proposed center would provide a facility for conferences and/or an educational institution with visitor stays of up to several weeks or months. Such a use would be compatible with the NPS goal of having the Presidio be a center for education, training and research.

The development of the facility as a conference center would not affect the existing supply of acute-care hospital beds in the Bay Area since the hospital is currently vacant and there is an oversupply of acute care beds in the region (State of California 1991). If used as an educational/conference center, the facility would not be available for other reuses such as a chronic health care facility for which a need has been identified in San Francisco (Baxter 1991). The City of San Francisco currently holds a lease option, authorized by Congress, for use of the Public Health Service hospital until 1998. To date it has not allocated funds to exercise this option to develop the facility. If the City did not release this option, federal legislation might be required to revoke the option and release the property before the lease option expiration date.

2. Alternative B. Public Sector Enclave Alternative C. NPS Management

i) Impacts

Alternatives B and C do not include the PHSH area within GGNRA jurisdiction. The NPS park boundaries would remain as currently designated which exclude the US Public Health Service hospital. The property would be disposed of by the GSA according to surplus property disposition procedures. It is assumed that the City might exercise its lease option to use this site as a long term chronic care facility.

The impacts would be described in a separate EIS as part of the redevelopment process. Impacts would depend on the type of reuse.

IX. HOUSING

This chapter analyzes the impacts of changes in housing use at the Presidio that would occur under the four reuse alternatives. Because the goal of the GMPA is to reuse Presidio housing to support park activities, the focus of the impacts analysis is on jobs/housing balance. This relationship is key to ensuring that the housing reuse programs serve Presidio employees, thereby reducing transportation and related impacts. This approach is consistent with expressed City of San Francisco and regional housing policies, which stress the relationship between new job creation and housing supply.

The Presidio has 1,192 units of family housing within 382 buildings. This includes 11 units in the U.S. Public Health Service hospital complex. The west housing area includes the Wherry housing area (built in 1953) containing 648 units in 2 - 8 unit buildings. This housing is in fair condition and does not have historic significance. The east housing area has 315 units, built in 1930; this housing has distinctive architectural styles. In addition, there are 75 housing units in the main post area, 130 units in Fort Scott, nine units in the Letterman complex and four units in scattered locations. At present, there are approximately 1,238 beds in group housing/apartment units, some with two or more beds to a room. The Army operated about 22 buildings as barracks, dormitories, bachelor officer quarters and guest houses with a total of 1,238 beds; 1,083 beds for staff use, and 155 beds for guest use. Dormitory space is located in many places in the Presidio with concentrations in Fort Scott, the main post, and Letterman complex. About 4,700 military personnel and their dependents resided at the Presidio, according to the 1990 Census; they included active duty Army and Navy personnel working at bases in San Francisco, the East Bay and Marin County. Civilians, or about 65 percent of total employees, were not eligible for housing on the post. During the Presidio's transition from military to civilian use, the NPS goal is to minimize the period of vacancy in housing units that may arise from departing military households.

A. Regional Housing Demand

In 1990 the San Francisco Bay Area had 2,246,242 households (occupied housing units). Households are forecast to increase to 2,550,980 by 2000 and 2,802,050 in 2010 (See Table 9.1). Most of this growth will occur in the suburban areas of the region (ABAG 1992).

Table 9.1: Bay Area Population and Households; 1980 - 2010

Year	Population	Households
1980	5,179,784	1,970,551
1990	6,023,577	2,246,242
2000	6,906,250	2,559,980
2010	7,508,450	2,802,050

Source: Association of Bay Area Governments

The San Francisco Bay Area has some of the nation's highest housing costs. Increases in new housing construction grew markedly in the east, south, and north bay suburban counties over the last decade. Land, construction, and living costs are well above the national average. Low density housing and employment development at the fringes of the Bay Area, where land costs are lower, has helped create a dispersed land use pattern

which increases the need for automobile travel and has increased traffic congestion. Regional and local emphasis in housing policy has included measures to balance housing and job creation as well as a varying range of affordable housing. These conditions may increase as the Bay Area's employment base grows, and competition increases for the limited supply of housing within reasonable commuting distance.

San Francisco had 328,471 housing units in 1990, with a vacancy rate of seven percent. About one-third of the units are single family homes, another third in buildings with 2-9 units, and a third in buildings with 10 or more units. Housing in the City of San Francisco itself is in limited supply, and ownership is out of reach for many residents. Approximately one-third of housing units in San Francisco are owner-occupied and two-thirds of San Francisco residents are renters. The median price of a home in San Francisco was \$275,000 in 1992. The average rent for a San Francisco two-bedroom apartment was \$990 in 1992 compared to \$780 in the Bay Area. Between 1980 and 1990 there were 15,816 units built or 1,582 per year. During the same period there were 1,698 units demolished or 170 per year.

The San Francisco Planning Department estimates a need for 22,467 new units of housing between 1990 and 1995, of which 13,480 or 60 percent are needed for families who cannot afford market rate housing. City goals are for the provision of affordable housing to accommodate 50 percent of new workers. There is a shortage of housing for families and individuals of low income, and as a result, the City has a number of efforts underway to develop or rehabilitate affordable housing for rental or purchase. The policy is to preserve existing housing, affordable housing, and providing housing associated with job growth. The 1992 target for affordable housing in the Comprehensive Housing Affordability Strategy (CHAS) is 2,045 units. The City also has a large and growing number of homeless people who live in City shelters and on the streets. The number of homeless is not known and there is controversy about the extent of homelessness. The 1990 Residence Element of the San Francisco Master Plan estimated between 6,600 and 7,000 "currently homeless" in San Francisco.

B. Proposed Actions and Reuses

Table 9.2 shows the number of residential housing units and dormitory beds to be removed or reused under each of the alternatives. The decrease in available housing units is due to building demolition. Much of the decrease in dormitory beds would be due to allocating one person to a room (rather than two or more). Reduction of dormitory beds is also due to the unsuitability of the space for civilian use, the removal of the building containing the dormitory beds, or its anticipated use for program purposes.

The Presidio plan proposes to reuse the family housing units for several purposes including: (1) staff housing for employees of tenants or National Park Service staff, (2) housing for military personnel stationed at the Presidio itself, or at other Bay Area installations, (3) guest lodging (including short-term family housing and overnight lodging for NPS or park partner guests), and (4) others, including staff of organizations which lease space under Alternative B. Proposed reuses of family housing by alternative are shown in Table 9.3. The beds in dormitories and barracks also are a housing resource that can be used by Presidio guests (for example, persons attending conferences or training programs) as well as by both NPS staff and staff of non-profit partners. The proposed reuse of dormitory and barracks beds are shown in Table 9.4.

A goal of the GMPA is to match the rents charged for on-site housing to the income levels of the projected Presidio workforce. This will be accomplished in three ways. For

housing occupied by military personnel, (i.e., 6th Army), the Department of Defense will follow the Basic Allowance for Quarters/Variable Housing Allowance (BAQ/VHA) formula, which essentially specifies the maximum amount chargeable for rent, based on income per military assignment and the status of individual households (with dependents versus without dependents). This system directly matches incomes to rents charged for units. For housing to be occupied by National Park Service staff, rents are calculated based on a Regional Rent Survey, which looks at a broad area to determine market rents. This approach, while not directly tied to the earnings of Park Service staff, will still likely result in rents that fall below "market rates" that could be charged for units with characteristics similar to Presidio housing. For housing to be occupied by park partners, housing costs that address the diversity of the employment base will be encouraged as part of the leasing and disposition strategy. Overall, the available housing stock provides a variety of housing types, from dormitory and apartment units to single- and multifamily homes. This variety of residential types will provide housing options suitable for Presidio employees with a range of incomes. It is assumed that those alternatives which offer the most housing for military and NPS staff (Alternative A and D) will result in the largest proportions of affordable employee housing units.

Table 9.2: Presidio Housing and Group Housing/Apartment Units Removed and Reused

Alternative and Year	Housing Units Removed	Housing Units Remaining	Group Housing/ Apartment Units Converted/Removed (Beds)	Group Housing/ Apartment Units Remaining (Beds)
Alternative A				
Year 2000	158	1,034	300	938
Year 2010	590	602	300	938
Alternative B				
Year 2000	0	1,181	529	709
Year 2010	0	1,181	529	709
Alternative C				
Year 2000	102	1,079	689	549
Year 2010	874	307	689	549
Alternative D				
Year 2000	52	1,140	319	919
Year 2010	92	1,100	319	919

Notes:

Alternatives A and D include 11 housing units in the Public Health Service Hospital complex; Alternatives B and C exclude this from the Presidio. Year 2010 housing removal totals include units removed by Year 2000.

Source: National Park Service.

Table 9.3: Reuse of Presidio Housing Units by Type of User

Alternative and Year	NPS/Partner Staff	Military	Guests	Other (a) Tenants	Total
Alternative A					
Year 2000	168	784 (b)	81	1	1,034
Year 2010	179	325 (b)	96	2	602
Alternative B					
Year 2000	95	150	39	897	1,181
Year 2010	95	150	39	897	1,181
Alternative C					
Year 2000	875	150	54	0	1,079
Year 2010	103	150	54	0	307
Alternative D					
Year 2000	267	792 (c)	81	0	1,140
Year 2010	212	792 (c)	96	0	1,100

Notes:

(a) Other = non-park related tenants (neither National Park Service staff or park partners or military users). These could include staff of other Federal agencies. In Alternative A, this category includes units that will be used for other non-residential uses.

(b) In Alternative A, the military will use up to 550 housing units for an indefinite period; for the purposes of this analysis, it is assumed that the military will occupy 325 units by the year 2010 associated with 6th Army use. Military use of housing in 2000 includes 600 units associated with 6th Army use and 184 units for other Department of Defense families.

(c) In Alternative D, the Sixth Army staff would use a total of 150 units; 34 units would be used for military community support in such functions as a housing office, a store, and a child care center; about 562 units would be used by other military employees working at the Presidio and other Bay Area bases.

Source: National Park Service.

Table 9.4: Reuse of Presidio Group Housing/Apartment Beds by Type of User

Alternative and Year	NPS/Partner Staff	Guests (a)	Total
Alternative A			
Year 2000 (b)	384	554	938
Year 2010	384	554	938
Alternative B			
Year 2000	634	75	709
Year 2010	634	75	709
Alternative C			
Year 2000	205	344	549
Year 2010	205	344	549
Alternative D			
Year 2000 (c)	255	664	919
Year 2010	255	664	919

Notes:

(a) Guest beds equals sum of Guest Dorm and Guest Room facility capacities, shown in Appendix D, with adjustments as noted below.

(b) Alternative A, guest beds includes 180 beds in PHSH that will remain in Presidio, but are not expected to be in use until after 2000.

(c) Alternative D, guest beds includes 180 beds in PHSH main building and 150 units in PHSH wings that will remain in Presidio but are not expected to be in use until after 2000.

Source: National Park Service.

C. Methodology

A process was developed for estimating the housing demand at the Presidio and in the surrounding region as a result of Presidio employment. The degree to which the housing demand created by employment at the Presidio is satisfied by housing resources on the Presidio is shown in Table 9.5. Those eligible for staff housing on the Presidio include park partner/tenant staff, NPS staff, and military personnel stationed at the Presidio or other Bay Area military installations. Bay Area housing demand was examined to assess the potential effects on the regional housing market which is shown in Table 9.6. The same set of assumptions was used for all alternatives. The analysis process was modified from Association of Bay Area Governments and city housing planning procedures.

The following procedure was used to determine the percent of housing demand that will be satisfied by Presidio housing resources (Table 9.5):

1. Total Presidio employment was derived by projecting job generation of the various land uses.
2. Total households that the jobs would represent were estimated using 1.3 Presidio workers per household, assuming some doubling up and some married couples both employed at the Presidio. This includes 150 Army staff to be stationed at the Presidio.
3. Potential Presidio employees who live in the Bay Area who would desire Presidio housing was calculated assuming that 75 percent of the people hired to work at the Presidio would already reside in the Bay Area and that 25 percent of the people hired would reside outside the region at the time of employment and would consequently move to the Bay Area and require housing. Of those already living in the Bay Area, 30 percent are estimated to be interested in living at the Presidio if housing were available (based on input from a 1989 GGNRA employment survey).
4. Potential Presidio employees who live outside the Bay Area who would desire Presidio housing was estimated assuming that 75 percent of those moving to the Bay Area would prefer Presidio housing.
5. Presidio housing demand is the sum of (3) and (4); that is, those who prefer Presidio housing who already live in the Bay Area and those who move to the Bay Area for Presidio employment.
6. Staff housing available at the Presidio is the number of housing units and dormitory beds available for Presidio employees.
7. Percent of Presidio employee housing demand satisfied at the Presidio was calculated by dividing the available housing (6) by the total Presidio housing demand (5).

The net new regional demand for housing units for new Presidio employees (Table 9.6) was calculated using the following method. The number of new employee households estimated to come from outside the Bay Area (Column 2) was compared to the available employee housing units at the Presidio (Column 4). It was assumed that Presidio employees who currently live in the Bay Area

already have housing. To determine the regional distribution of housing demand by Presidio employees, the residence patterns of existing park personnel were examined. It was estimated that 40 percent of the park work force not residing in the Presidio would choose to live in San Francisco; 36 percent would choose Marin County or areas farther north; 13 percent would choose the peninsula south of San Francisco; and 11 percent would choose the East Bay. Although some new housing demand would simply replace existing Presidio civilian and military demand, no estimate was made of the effect of this phenomenon.

D. Impacts

1. Alternative A. Public and Private Partnership

a) Proposal

Under Alternative A, housing would be used primarily by NPS and tenant staff who provide support for park visitor services and programs. 158 units would be removed by the year 2000 to provide for restoration of natural areas and one unit would be converted to non-residential uses. Until 2000 the military would use 784 units as an interim use. Employees of park partners and NPS staff would be provided with 168 units until 2000.

Between 2000 and 2010 an additional 432 housing units would be removed in order to restore natural areas for a total of 590 units removed. There would be 602 family housing units remaining by 2010. Military housing will be phased down to 325 units. Subtracting out the 96 units to be used as guest quarters, including short-term visiting teachers or researchers, and two units to be used for non-residential purposes, there would be 179 housing units available for persons working on the Presidio.

Barracks and dormitories will be reused either as conference facility housing or as housing for youth employment and similar programs, or for staff use for the NPS or non-profit partners. A total of 300 beds will be removed leaving a balance of 938 beds primarily due to reductions in room capacity from 2 persons to 1 person. NPS and park partner staff would use 384 beds, and 554 beds would be used for guests.

b) Impacts

Until 2000, the reuse of Presidio housing units for military, NPS staff, and tenant staff would provide a total of 1,034 units of existing family housing units and 938 dormitory beds. Military personnel would be provided 784 units of family housing. This would provide housing for military personnel stationed in the Bay Area. An estimated 169 housing units and 384 dormitory beds would be provided until 2000 for civilians working at the Presidio. These housing resources would more than satisfy the estimated demand by people who work and wish to live on the Presidio (Table 9.5).

Between 2000 and 2010 there would be a reduction of 432 additional family units. The phase out of military housing could be scheduled to the normal rotation of military personnel so that no families would be displaced. The reduction in units from 2000 to 2010 would reduce the supply of housing available to military personnel in the Bay Area by 459 units. The future need for military housing is dependent on the staffing of military facilities in the Bay Area which is not known at this time.

Between 2000 and 2010 the number of housing units and dormitory beds available for civilians working on the Presidio would decrease by 448 from 1,336 to 888. The

percentage of housing demand satisfied by people who work and wish to live on the Presidio would decrease from 108 percent in 2000 to 58 percent in 2010 (Table 9.5).

As shown in Table 9.6, the Presidio is estimated to provide more than sufficient housing to satisfy new housing demand created by the project in the year 2000. By the year 2010, the project would generate demand for approximately 32 housing units beyond those available for staff at the Presidio. The increased housing demand for 2010 is estimated to be distributed throughout the Bay Area as indicated in Table 9.6. San Francisco demand is estimated as 13 units, which is equivalent to less than one percent of the new housing constructed between 1980 and 1990.

In total there would be a removal of 590 housing units by 2010 which would reduce the Bay Area housing stock by 0.02 percent over the 1990 level. For San Francisco, the reduction in the housing stock would be 0.18 percent over the 1990 level. Assuming the 1980 - 1990 demolition rate in San Francisco of 170 units per year continues, the removal of 590 housing units from 1995 to 2010 is equal to 23 percent of the total demolitions during the plan implementation period.

Between 1980 and 1990, the rate of new construction of housing units in San Francisco averaged 1,582 units per year. Assuming this rate continues, the 590 units removed equals two percent of the new housing that will be constructed from 1995 to 2010.

A total of 300 dormitory beds will be removed or converted to other uses leaving 938 dormitory beds for use by guests or staff working on the Presidio. Since many of these dormitory beds are not occupied during the baseline period, there will be no displacement of residents in removing or converting these dormitories.

Table 9.5: Employee Housing Demand Met by Presidio Housing

Alternative And Year	Total Employment	Total Households (a)	Potential Presidio Employees who live in S.F. Bay Area who would desire Presidio housing (b)	Potential Presidio Employees who live outside Bay Area who would desire Presidio housing (c)	Presidio Housing Demand (d)	Staff Housing Available At Presidio (e)	Percent of Presidio Employee Housing Demand Satisfied at the Presidio (f)
Alternative A							
2000	3,894	2,995	674	562	1,236	1,336	108%
2010	4,782	3,678	828	690	1,518	888	58%
Alternative B							
2000	4,228	3,252	732	610	1,342	1,776	132%
2010	5,438	4,183	941	784	1,725	1,776	103%
Alternative C							
2000	2,646	2,035	458	382	840	1,230	146%
2010	3,176	2,443	550	458	1,008	458	45%
Alternative D							
2000	4,131	3,178	715	596	1,311	1,314	100%
2010	5,088	3,914	881	734	1,615	1,259	78%

Notes:

(a) Number of employees/1.3 workers per household.

(b) Assumes that 30% of those 75% of potential Presidio employee households from the Bay Area would desire to move to the Presidio.

(c) Assumes that 75% of those 25% of potential Presidio employee households from outside the Bay Area would desire to move to the Presidio.

(d) Potential employees from Bay Area plus outside Bay Area.

(e) Number of Presidio housing units and dormitory beds allocated for staff use, Table 2.3

(f) Staff housing available/housing demand.

All figures rounded to nearest whole number.

Source: National Park Service.

Table 9.6: New Regional Housing Demand Estimates

Alternative And Year	Total Employment	Presidio Employees from outside Bay Area (a)	New Households From Outside Bay Area (b)	Employee Housing Units at the Presidio (c)	Net New Regional Housing Demand by the Presidio(d)	New San Francisco Housing Demand (40%)(e)	New North Bay Demand (36%)(f)	New East Bay Demand (11%)(g)	New Peninsula Demand (13%)(h)
Alternative A									
2000	3,894	974	749	1,336	-587	n.a.	n.a.	n.a.	n.a.
2010	4,782	1,196	920	888	32	13	12	4	4
Alternative B									
2000	4,228	1,057	813	1,776	-963	n.a.	n.a.	n.a.	n.a.
2010	5,438	1,360	1,046	1,776	-730	n.a.	n.a.	n.a.	n.a.
Alternative C									
2000	2,646	662	509	1,230	-721	n.a.	n.a.	n.a.	n.a.
2010	3,176	794	611	458	153	61	55	17	20
Alternative D									
2000	4,131	1,033	795	1,314	-519	n.a.	n.a.	n.a.	n.a.
2010	5,088	1,272	978	1,259	-281	n.a.	n.a.	n.a.	n.a.

Notes:

- (a) 25 percent of total employment.
- (b) Number of employees/1.3 workers per household.
- (c) Number of Presidio housing units and dormitory beds allocated for staff use.
- (d) New households minus Presidio housing units.
- (e) Assumes that 40% of new Presidio housing demand will be in San Francisco.
- (f) Assumes that 36% of new Presidio housing demand will be in the North Bay.
- (g) Assumes that 11% of new Presidio housing demand will be in the East Bay.
- (h) Assumes that 13% of new Presidio housing demand will be in the Peninsula (South Bay).

Source: National Park Service.

2. Alternative B. Public Sector Enclave

a) Proposal

Under Alternative B, all of the family housing units will remain for the years 2000 and 2010. The housing will be used for NPS staff (70 units) and other tenants of the Presidio. 529 dormitory beds will be removed or converted to other uses primarily due to reductions in room capacity from two persons to one person.

b) Impacts

The reuse of Presidio housing would provide a total of 1,181 units of existing family housing for both time forecasts of the plan. In addition 709 dormitory beds would be available for guest and staff use (Table 9.2).

An estimated 1,776 housing units and dormitory beds would be provided for both 2000 and 2010 for people working at the Presidio, including 150 Sixth Army personnel and 70 NPS staff. These housing resources would more than satisfy the estimated housing demand from people who work and wish to live on the Presidio (Table 9.5).

Since no family housing is removed, the family housing stock in San Francisco would not be decreased. The conversion of 529 dormitory beds would not be expected to have a significant impact.

There will be no new regional housing demand for the Bay Area because of a relocation of people working on the Presidio who need Bay Area housing. For 2000 and 2010 the number of units available on the Presidio for staff who wish to live on the Presidio exceeds the number of employees who are expected to seek Presidio housing by 963 and 730 units, respectively (Table 9.6).

3. Alternative C. NPS Management

a) Proposal

Under Alternative C, nonhistoric housing will be removed to maximize emphasis on the upkeep of historic buildings, increase open space, and restore natural areas. 102 family units would be removed by 2000, and an additional 772 units would be phased out from 2000 to 2010 for a total of 874 units removed by 2010. Housing to be removed includes the Wherry housing, east housing area and the Officers' Family Housing on Washington Avenue. A total of 307 units will remain by 2010 (Table 9.2).

The housing will be used for persons employed on the Presidio, either NPS staff or non-profit partners, military, and 54 units would be reserved for guest lodging. Sixth Army personnel would use 150 housing units at the Presidio. A total of 689 dormitory units would be removed or converted to other uses leaving 549 dormitory beds (Table 9.2).

b) Impacts

The reuse of housing units on the Presidio will provide 1,025 units for employees working at the Presidio including NPS, tenant, and military employees until the year 2000, and 253 units by 2010. Between 2000 and 2010 the number of units available for

NPS and park partner staff would decrease from 875 to 103 units. 150 units would be provided for Presidio military personnel in the year 2000 and 2010 (Table 9.3). If the phase out is timed to lease arrangements and employee turnover, no families would be displaced. However, Presidio housing for employees of the non-profit partners will be significantly reduced.

An estimated 1,230 housing units and dormitory beds would be provided until the year 2000 and 458 units and beds by 2010 for people working at the Presidio. These housing resources would more than satisfy the estimated demand by people who work and wish to live on the Presidio in 2000 and would satisfy 45 percent of the demand in 2010 (Table 9.5).

There will be no new regional housing demand in the Bay Area in the year 2000 because of the relocation of people working on the Presidio who need Bay Area housing. In 2010, the new regional housing demand for the Bay Area because of increased employment on the Presidio is estimated as 153 units. The housing demand is estimated to be distributed throughout the Bay Area as indicated in Table 9.6. San Francisco demand is estimated as 61 units, which is equivalent to less than one percent of the new housing constructed between 1980 and 1990.

This alternative would result in a total of 874 family housing units removed by 2010. This would reduce the Bay Area housing stock by less than one-tenth of one percent over the 1990 level. For San Francisco this would reduce the housing stock by less than one percent over the 1990 level.

4. Alternative D. Military Reuse With Public/Private Partnerships

a) Proposal

Under Alternative D, the military will use the Wherry housing and the Washington Boulevard housing. For the year 2000, 52 units of the east housing area will be removed to improve open space, and natural and recreation values. A total of 1,140 units will remain. Military staff and dependents will use 792 units. A total of 267 units will be used by persons employed at the Presidio and 81 units for guest housing. For the year 2010 an additional 40 units will be removed. Military use will remain at the same level; housing for Presidio employees will decrease by 55 units and guest housing will increase by 15 units. Approximately 319 dormitory beds will be converted or removed, leaving 919 dormitory beds.

b) Impacts

The reuse of housing units on the Presidio will provide 1,140 units for the military and employees working at the Presidio, including non-profit partners and NPS staff until the year 2000. For the year 2010 the number of units will be reduced by 40 to 1,100. The military will be provided 792 units of housing for military personnel in the Bay Area for both phases of the plan.

Until 2000 an estimated 1,314 housing units and dormitory beds would be provided for people working at the Presidio. For 2010 there would be 1,259 units and beds. These housing resources would satisfy 100 percent of the estimated demand by people who work and wish to live on the Presidio in 2000 and 78 percent of the demand in 2010 (Table 9.5).

Alternative D is not expected to create a net increase in regional housing demand for the Bay Area because the project would provide more than sufficient housing onsite for employees who might come from outside of the Bay Area.

By 2010 there would be a total of 92 units of family housing removed. This would be a reduction in the Bay Area housing stock of 0.01 percent over the 1990 level. For San Francisco it would be a reduction of 0.03 percent over the 1990 level. There would be 319 dormitory beds removed or converted.

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APPENDIX A: CITY OF SAN FRANCISCO REVENUE MODEL

Appendix A: Presidio Revenue Generation Model

General Assumptions	
Inflation Rate (All Revenues in 1993 \$)	0.00%
2000 Building Occupancy Rate	70%
2010 Building Occupancy Rate	90%

Summary: All Revenue		
Alternative	2000	2010
A	\$2,590,000	\$3,655,000
B	\$2,784,000	\$3,568,000
C	\$2,552,000	\$2,817,000
D	\$2,695,000	\$4,144,000

Summary of Revenue Impacts								
Revenue Source	A (2000)	A (2010)	B (2000)	B (2010)	C (2000)	C (2010)	D (2000)	D (2010)
Property	\$611,000	\$804,000	\$1,129,000	\$1,452,000	\$1,026,000	\$664,000	\$651,000	\$767,000
Business	\$376,000	\$442,000	\$463,000	\$592,000	\$383,000	\$458,000	\$424,000	\$511,000
Hotel	\$797,000	\$1,628,000	\$332,000	\$508,000	\$372,000	\$1,102,000	\$747,000	\$1,896,000
Sales	\$439,000	\$568,000	\$402,000	\$558,000	\$399,000	\$485,000	\$484,000	\$600,000
Other	\$367,000	\$213,000	\$458,000	\$458,000	\$372,000	\$108,000	\$389,000	\$370,000
Total	\$2,590,000	\$3,655,000	\$2,784,000	\$3,568,000	\$2,552,000	\$2,817,000	\$2,695,000	\$4,144,000

Population Estimates								
	A (2000)	A (2010)	B (2000)	B (2010)	C (2000)	C (2010)	D (2000)	D (2010)
Residential Population								
Apartment/Dormitory	384	384	634	634	205	205	255	255
Family Housing	3,046	1,613	3,654	3,654	3,280	810	3,389	3,213
Total Residential Population	3,430	1,997	4,288	4,288	3,485	1,015	3,644	3,468
Average Visitors per Night								
Total Transient Population	391	720	142	218	350	492	365	794

Appendix A: Presidio Revenue Generation Model

Building Type	Square Footage							
	A (2000)	A (2010)	B (2000)	B (2010)	C (2000)	C (2010)	D (2000)	D (2010)
Dormitory	448,727	484,792	340,551	340,551	342,108	342,108	369,952	369,952
Industrial	322,204	312,299	342,949	342,949	322,459	301,352	362,323	360,767
Infrastructure	78,295	46,153	80,168	80,168	46,343	46,318	47,197	47,197
Institutions	468,601	571,531	125,802	125,802	117,559	117,559	456,016	454,536
Medical/Research	844,759	844,759	796,840	796,840	0	0	796,840	796,840
Military	139,661	139,661	142,562	142,562	137,242	137,242	137,886	137,886
Office	887,594	886,990	1,323,861	1,323,861	1,042,669	975,124	1,106,148	1,037,825
Residential	1,774,083	1,167,670	2,021,758	2,021,758	1,871,319	750,056	1,861,301	1,793,823
Retail	307,682	142,823	179,803	179,803	179,592	157,190	196,270	179,902
Warehouse	446,873	414,245	609,233	609,233	488,731	460,694	667,940	495,820
Totals	5,718,479	5,010,923	5,963,527	5,963,527	4,548,022	3,287,643	6,001,873	5,674,548

Building Type	Square Feet Per Employee				Average Annual Wage			
	A	B	C	D	A	B	C	D
Dormitory	n.a.	n.a.	n.a.	n.a.	\$20,536	\$20,536	\$20,536	\$20,536
Industrial	750	750	750	750	\$36,188	\$36,188	\$36,188	\$36,188
Infrastructure	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Institutions	1,000	1,000	1,000	1,000	\$28,237	\$28,237	\$28,237	\$28,237
Medical/Research	550	550	550	550	\$32,943	\$32,943	\$32,943	\$32,943
Military	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Office	385	385	385	385	\$21,988	\$21,988	\$21,988	\$21,988
Residential	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Retail	500	500	500	500	\$19,186	\$19,186	\$19,186	\$19,186
Warehouse	5,000	5,000	5,000	5,000	\$36,188	\$36,188	\$36,188	\$36,188

Building Type	Employees							
	A (2000)	A (2010)	B (2000)	B (2010)	C (2000)	C (2010)	D (2000)	D (2010)
Dormitory	82	106	62	80	48	62	80	103
Industrial	301	375	320	412	301	362	338	433
Infrastructure	0	0	0	0	0	0	0	0
Institutions	328	514	88	113	82	106	319	409
Medical/Research	1,075	1,382	1,014	1,304	0	0	1,014	1,304
Military	0	0	0	0	0	0	0	0
Office	1,614	2,073	2,407	3,095	1,896	2,280	2,011	2,426
Residential	0	0	0	0	0	0	0	0
Retail	431	257	252	324	251	283	275	324
Warehouse	63	75	85	110	68	83	94	89
Totals	3,894	4,782	4,228	5,438	2,646	3,176	4,131	5,088

Appendix A: Presidio Revenue Generation Model

Percentage of Square Footage Occupied By Tax-Exempt Non-Profits or Governmental Agencies								
Building Type	A (2000)	A (2010)	B (2000)	B (2010)	C (2000)	C (2010)	D (2000)	D (2010)
Dormitory	0%	0%	0%	0%	0%	0%	0%	0%
Industrial	60%	60%	60%	60%	60%	60%	60%	60%
Infrastructure	100%	100%	100%	100%	100%	100%	100%	100%
Institutions	100%	100%	100%	100%	100%	100%	100%	100%
Medical/Research	100%	100%	100%	100%	100%	100%	100%	100%
Military	100%	100%	100%	100%	100%	100%	100%	100%
Office	60%	60%	60%	60%	60%	60%	60%	60%
Residential	76%	54%	13%	13%	14%	49%	69%	72%
Retail	60%	60%	60%	60%	60%	60%	60%	60%
Warehouse	60%	60%	60%	60%	60%	60%	60%	60%

Note: Percentage of tax exempt residential space is based on the number of residential units used by the military as a percentage of total residential units. See Table 9.3, Reuse of Presidio Housing Units by Type of User. Other percentages are estimates.

Appendix A: Presidio Revenue Generation Model

Property Tax Assumptions	
Term of Leases	15
Inflation Rate for Leases	4.00%
Discount Rate for Assessment	10.00%
Administrative Expense Allowance	15.00%
Property Tax Rate(a)	0.60%

Property Tax Results		
Alternative	2000	2010
A	\$611,000	\$804,000
B	\$1,129,000	\$1,452,000
C	\$1,026,000	\$664,000
D	\$651,000	\$767,000

Note:

(a) Local property tax rate is 1.15 percent, with approximately 52 percent allocated to City and County level services.

Monthly Lease Rates Per Square Foot	Monthly Rate (1993)	Annual Present Value (2000)	Annual Present Value (2010)
Dormitory	\$1.00	\$106.38	\$106.38
Industrial	\$0.35	\$37.23	\$37.23
Institutions	\$0.50	\$53.19	\$53.19
Medical/Research	\$0.50	\$53.19	\$53.19
Office	\$0.70	\$74.46	\$74.46
Residential	\$0.90	\$95.74	\$95.74
Retail	\$1.50	\$159.57	\$159.57
Warehouse	\$0.35	\$37.23	\$37.23

Business Tax Assumptions		
Number of Businesses	60	
Business Registration Fee	\$150	
Total Business Registration Fees	\$9,000	
Payroll Tax	1.50%	
Building Types	Avg Annual Wage (2000)	Avg Annual Wage (2010)
Dormitory	\$20,536	\$20,536
Industrial	\$36,188	\$36,188
Infrastructure	N.A.	N.A.
Institutions	\$28,237	\$28,237
Medical/Research	\$32,943	\$32,943
Military	N.A.	N.A.
Office	\$21,988	\$21,988
Residential	N.A.	N.A.
Retail	\$19,186	\$19,186
Warehouse	\$36,188	\$36,188

Business Tax Results		
Alternative	2000	2010
A	\$376,000	\$442,000
B	\$463,000	\$592,000
C	\$383,000	\$458,000
D	\$424,000	\$511,000

Appendix A: Presidio Revenue Generation Model

Sales Tax Assumptions	
Sales Tax Rate (City and County Level Services)	2.25%
Does not include 0.25 % levy for S.F. Schools	

Estimated Sales Tax Revenues	Gross Retail Sales		Total Sales Tax Revenues	
	2000	2010	2000	2010
Alternative				
Alternative A	\$19,531,000	\$25,266,000	\$439,448	\$568,485
Alternative B	\$17,848,000	\$24,816,000	\$401,580	\$558,360
Alternative C	\$17,731,000	\$21,552,000	\$398,948	\$484,920
Alternative D	\$21,513,000	\$26,671,000	\$484,043	\$600,098

Note: Estimated retail sales from Chapter VII. See also, Appendix C.

Hotel Tax Assumptions	
Hotel Tax Rate	12.00%

Estimated Guest Lodging Revenues	Gross Lodging Revenue		Total Tax Revenues	
	2000	2010	2000	2010
Alternative A	\$6,640,000	\$13,565,000	\$796,800	\$1,627,800
Alternative B	\$2,764,000	\$4,232,000	\$331,680	\$507,840
Alternative C	\$3,099,000	\$9,181,000	\$371,880	\$1,101,720
Alternative D	\$6,227,000	\$15,801,000	\$747,240	\$1,896,120

Note: Estimated guest lodging revenue from Chapter VII. See also, Appendix C.

Appendix A: Presidio Revenue Generation Model

Other Tax Assumptions		
Estimated 1993 Population (City)	752,000	
Estimated 1993 Employment (City)	586,500	
1993-94 Motor Vehicle In-Lieu Revenue	\$60,843,000	
1993-94 Gas Tax Revenue	\$19,500,000	
1993-94 Total Pop.-Based Revenue	\$80,343,000	
1993-94 Utility User Tax Revenue	\$45,120,000	
1993-94 Total Empl.-Based Revenue	\$45,120,000	
	2000	2010
Population-Based Revenue Per Capita	\$107	\$107
Employment-Based Revenue Per Employee	\$77	\$77

Other Tax Results		
Alternative	2000	2010
A	\$366,501	\$213,336
B	\$458,169	\$458,169
C	\$372,334	\$108,399
D	\$389,300	\$370,497

Notes:

City of San Francisco revenue estimates from "Schedule of Budgeted and Projected Revenues", City of San Francisco Controller's Office, February 10, 1994. City of San Francisco employment estimates from California Employment Development Department; population estimate from California Department of Finance. Potential Utility User Tax revenues are estimated to equal approximately \$77 per employee in non-exempt organizations; however, Federal and State agencies, and some non-profit organizations are exempt from the Utility User's Tax (S.F. Tax Collector's Office, 4/20/94). It is not possible to determine the proportion of users that would be exempt from utility use tax, thus the analysis assumes no new revenues from this source.

Appendix A: Presidio Revenue Generation Model

	Occupied & Taxable Square Footage		Possessory Interest Property Tax		Business Payroll Tax	
	2000	2010	2000	2010	2000	2010
Alternative A						
Dormitory	314,109	436,313	\$199,818	\$277,557	\$25,259	\$32,652
Industrial	90,217	112,428	\$20,087	\$25,032	\$65,296	\$81,371
Infrastructure	0	0	\$0	\$0	\$0	\$0
Institutions	0	0	\$0	\$0	\$0	\$0
Medical/Research	0	0	\$0	\$0	\$0	\$0
Military	0	0	\$0	\$0	\$0	\$0
Office	248,526	319,316	\$110,669	\$142,192	\$212,906	\$273,550
Residential	298,046	483,415	\$170,640	\$276,769	\$0	\$0
Retail	86,151	51,416	\$82,206	\$49,062	\$49,587	\$29,594
Warehouse	125,124	149,128	\$27,859	\$33,203	\$13,584	\$16,190
Total	1,162,174	1,552,017	\$611,279	\$803,815	\$366,632	\$433,357

	Occupied & Taxable Square Footage		Possessory Interest Property Tax		Business Payroll Tax	
	2000	2010	2000	2010	2000	2010
Alternative B						
Dormitory	238,386	306,496	\$151,647	\$194,975	\$19,098	\$24,643
Industrial	96,026	123,462	\$21,380	\$27,489	\$69,500	\$89,357
Infrastructure	0	0	\$0	\$0	\$0	\$0
Institutions	0	0	\$0	\$0	\$0	\$0
Medical/Research	0	0	\$0	\$0	\$0	\$0
Military	0	0	\$0	\$0	\$0	\$0
Office	370,681	476,590	\$165,064	\$212,225	\$317,553	\$408,283
Residential	1,231,251	1,583,037	\$704,926	\$906,334	\$0	\$0
Retail	50,345	64,729	\$48,040	\$61,765	\$28,977	\$37,257
Warehouse	170,585	219,324	\$37,981	\$48,832	\$18,519	\$23,811
Total	2,157,273	2,773,637	\$1,129,038	\$1,451,621	\$453,648	\$583,350

Appendix A: Presidio Revenue Generation Model

	Occupied & Taxable Square Footage		Possessory Interest Property Tax		Business Payroll Tax	
	2000	2010	2000	2010	2000	2010
Alternative C						
Dormitory	239,476	307,897	\$152,341	\$195,867	\$14,786	\$19,098
Industrial	90,289	108,487	\$20,103	\$24,155	\$65,347	\$78,518
Infrastructure	0	0	\$0	\$0	\$0	\$0
Institutions	0	0	\$0	\$0	\$0	\$0
Medical/Research	0	0	\$0	\$0	\$0	\$0
Military	0	0	\$0	\$0	\$0	\$0
Office	291,947	351,045	\$130,004	\$156,320	\$250,104	\$300,731
Residential	1,126,534	344,276	\$644,973	\$197,108	\$0	\$0
Retail	50,286	56,588	\$47,983	\$53,997	\$28,943	\$32,571
Warehouse	136,845	165,850	\$30,468	\$36,926	\$14,856	\$18,005
Total	1,935,376	1,334,143	\$1,025,872	\$664,373	\$374,037	\$448,925

	Occupied & Taxable Square Footage		Possessory Interest Property Tax		Business Payroll Tax	
	2000	2010	2000	2010	2000	2010
Alternative D						
Dormitory	258,966	332,957	\$164,740	\$211,808	\$24,643	\$31,728
Industrial	101,450	129,876	\$22,588	\$28,917	\$73,426	\$93,999
Infrastructure	0	0	\$0	\$0	\$0	\$0
Institutions	0	0	\$0	\$0	\$0	\$0
Medical/Research	0	0	\$0	\$0	\$0	\$0
Military	0	0	\$0	\$0	\$0	\$0
Office	309,721	373,617	\$137,919	\$166,372	\$265,331	\$320,068
Residential	403,902	452,043	\$231,246	\$258,808	\$0	\$0
Retail	54,956	64,765	\$52,439	\$61,799	\$31,631	\$37,277
Warehouse	187,023	178,495	\$41,641	\$39,742	\$20,304	\$19,378
Total	1,316,019	1,531,753	\$650,572	\$767,446	\$415,335	\$502,451

APPENDIX B: NON-PROFIT ORGANIZATION DATABASES

1. Register of California Non-Profit Organizations (1990)

The Register of California Non-Profit Organizations is produced by the Registry of Charitable Trusts, an office of the State Attorney General with which all California non-profit organizations must register. The Register is available in computer tape format and micro fiche.

The Register is available by name, purpose, revenue, assets, location, or by grants or operations. The Foundation Center has the Register by name and by purpose on micro fiche.

Contact:
The Registry of Charitable Trusts
P.O. Box 13447
Sacramento, CA 94813
(916) 445-2021

2. National Directory of Non-Profit Organizations

In two volumes: Volume 1 contains organizations with revenues greater than or equal to \$100,000; Volume 2 contains organizations with revenues between \$25,000 and \$99,999. The entries are listed in alphabetical order and consist of: organization name, mailing address and telephone number, IRS filing status, employer identification number, charitable deduction eligibility, reported annual income, and activity code.

In addition to the alphabetical listing, the organizations are organized by an Activity index and a Geographical index. Geographical index entries are listed by zip code by state. Index entries contain organization names only.

Contact:
The Taft Group
12300 Twinbrook Parkway, Suite 450
Rockville, MD 20852
(301) 816-0210

3. Information Marketing Services

Information Marketing Services provides the database for the National Directory of Non-Profit Organizations. For a fee, IMS will perform a query according to specific criteria (e.g., zip code) and will provide the records to the user in various formats. The most convenient format (for analysis) is the 5.25" or 3.5" floppy diskette in flat-file or delimited ASCII format.

The basic query costs \$50.00 per thousand records. Floppy diskette media cost an additional \$30.00 per thousand records. Queries recover only names and addresses of organizations. Additional fields, such as exact income or activity, cost an additional fee of \$5.00 per thousand records.

Contact:
Information Marketing Services, Inc.
8130 Boone Blvd. #310
Vienna, VA 22182
(703) 821-8130

4. Yearbook of California Charitable Organizations

The State of California's Registrar of Charitable Trusts provides the information used in this volume. The listings are in alphabetical order and contain the following information fields: name and address, dollar-amount of direct public support, total revenue, program services expenditures, management and general expenditures, total expenditures, and total assets.

In addition to the alphabetical listings, the volume contains two indices: Purpose Code Cross-reference in County and Alphabetical Order, and County Cross-Reference in Zip Code and Alphabetical Order. The index listings contain only organization names.

Contact:
The National Center for Charitable Trusts
1828 L Street, N.W.
Suite 1200
Washington, D.C. 20036
(202) 223-8100

5. Charitable Organizations of the U.S: A Descriptive and Financial Information Guide

A guide to 800 of the United States' largest public charities - "non-profit organizations which solicit tax-deductible contributions from the public and use those funds to sponsor programs and activities that benefit the public."

Entries are listed in alphabetical order and contain the following organization information: history and purpose; activities and charitable programs, administration and staff; fund-raising sources, methods, and activities; procedure for applying for aid; prominent supporters; tax status; financial data; and sources of financial and other data.

The volume also contains three indices: Alphabetical and Subject Index; Geographic Index, listing organizations by state and city; and a Personal Name Index, listing names of all persons mentioned within the entries. The Alphabetical and Subject and the Geographic Index entries contain the organization name and address, phone number, and contact person.

Contact:
Gale Research, Inc.
Detroit, MI

6. California Non-Profit Database

The Institute for Non-Profit Management at the University of San Francisco maintains this database of financial information for California non-profit organizations. The database includes up to two years of tax return information for each of approximately 125,000 organizations. This database includes information for both charitable organizations and mutual benefit associations. The database can be searched according to various criteria, depending on the information required.

Contact:
Paula Obrebski
Institute for Non-Profit Management
University of San Francisco
2130 Fulton Street
San Francisco, CA 94117
(415) 666-2336

**APPENDIX C: PRESIDIO RETAIL, RESTAURANT, AND LODGING
REVENUE ESTIMATES**

Appendix C: Presidio Retail, Restaurant, and Lodging Revenue Estimates

Table A.1: Annual Projected Revenues, Alternative A, Year 2000

(Expressed in 1993 Dollars)

Revenue Generators	Number of People	Estimated Ave. Annual Spending	Total Estimated Revenues
Residents	921	\$750	\$691,000
Employees	3,238	\$800	\$2,590,000
Visitors	6,500,000	\$2.50	\$16,250,000
Total	6,504,159		\$19,531,000

Guest Accommodations	Number	Occupancy Rate	Average Daily Rate
Dorm/Conf. Ctr./Apt. Rooms	273	64.00%	\$68
Guest Rooms	28	64.00%	\$68
Rooms in Guest Houses	117	64.00%	\$68

Resident Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	43.00%	\$323	\$297,130
Retail	57.00%	\$428	\$393,870
Total			\$691,000

Employee Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	55.00%	\$440	\$1,424,500
Retail	45.00%	\$360	\$1,165,500
Total			\$2,590,000

Visitor Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	30.00%	\$0.75	\$4,875,000
Retail	70.00%	\$1.75	\$11,375,000
Total			\$16,250,000

Sales Summary

Total Food and Beverage Sales	\$6,596,630
Total Retail Sales	\$12,934,370
Total Guest Room Revenues	\$6,640,000
Total Revenues	\$26,171,000

Sales by Square Footage	Square Feet	Estimated Sales	Estimated Sale/Sq.Ft.
Food and Beverage	45,998	\$6,596,630	\$143.41
Retail	51,928	\$12,934,370	\$249.08

(Note: Employee and Resident populations include civilians only.)

Appendix C: Presidio Retail, Restaurant, and Lodging Revenue Estimates

Table A.2: Allocation of Sales By Square Footage, Alternative A, Year 2000

FOOD AND BEVERAGE

Structure Name	Building Number	Square Feet	Estimated Sales
NCO Club	135	24,115	\$3,458,362
Burger King	211	9,294	\$1,332,864
Warehouse	983	5,089	\$729,820
Dormitory and Offices	1903	7,500	\$1,075,584
Total			\$6,596,630

Structure Name	Sq.Ft Per Seat.	Percent Allocated for Seating	Number of Seats	Sales Per Seat
NCO Club	16	40.00%	603	\$5,736
Burger King	15	40.00%	248	\$5,378
Warehouse	15	40.00%	248	\$5,378
Dormitory and Offices	16	40.00%	188	\$5,736

RETAIL

Structure Name	Building Number	Square Feet	Estimated Sales
Sutler's Store	116	2,970	\$739,776
Exchange Admin. Offices	201	11,458	\$2,853,990
Warehouse and Offices	222	4,789	\$1,192,857
Warehouse and Offices	223	11,286	\$2,811,148
Warehouse	227	11,796	\$2,938,180
Dry Cleaners	228	4,277	\$1,065,327
Bank	229	2,762	\$687,967
Mine Loading House	986	1,090	\$271,500
Guard Station/Office	988	500	\$124,541
Garage and Storage	1902	1,000	\$249,083
Total			\$12,934,370

Appendix C: Presidio Retail, Restaurant, and Lodging Revenue Estimates

Table A.3: Annual Projected Revenues, Alternative A, Year 2010

(Expressed in 1993 Dollars)

Revenue Generators	Number of People	Estimated Ave. Annual Spending	Total Estimated Revenues
Residents	957	\$750	\$718,000
Employees	4,435	\$800	\$3,548,000
Visitors	8,400,000	\$2.50	\$21,000,000
Total	8,405,392		\$25,266,000

Guest Accommodations	Number	Occupancy Rate	Average Daily Rate
Dorm/Conf. Ctr./Apt. Rooms	453	85.00%	\$68
Guest Rooms	28	85.00%	\$68
Rooms in Guest Houses	162	85.00%	\$68

Resident Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	43.00%	\$323	\$308,740
Retail	57.00%	\$428	\$409,260
Total			\$718,000

Employee Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	55.00%	\$440	\$1,951,400
Retail	45.00%	\$360	\$1,596,600
Total			\$3,548,000

Visitor Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	30.00%	\$0.75	\$6,300,000
Retail	70.00%	\$1.75	\$14,700,000
Total			\$21,000,000

Sales Summary

Total Food and Beverage Sales	\$8,560,140
Total Retail Sales	\$16,705,860
Total Guest Room Revenues	\$13,565,000
Total Revenues	\$38,831,000

Sales by Square Footage	Square Feet	Estimated Sales	Estimated Sale/Sq.Ft.
Food and Beverage	68,204	\$8,560,140	\$125.51
Retail	74,619	\$16,705,860	\$223.88

(Note: Employee and Resident populations include civilians only.)

Appendix C: Presidio Retail, Restaurant, and Lodging Revenue Estimates

Table A.4: Allocation of Sales By Square Footage, Alternative A, Year 2010

FOOD AND BEVERAGE

Structure Name	Building Number	Square Feet	Estimated Sales
Officer's Club	50	31,500	\$3,953,498
NCO Club	135	24,115	\$3,026,623
Warehouse	983	5,089	\$638,710
Dormitory	1903	7,500	\$941,309

Total \$8,560,140

Structure Name	Sq.Ft Per Seat.	Percent Allocated for Seating	Number of Seats	Sales Per Seat
Officer's Club	16	40.00%	788	\$5,020
NCO Club	16	40.00%	603	\$5,020
Warehouse	15	40.00%	136	\$4,707
Dormitory	16	40.00%	188	\$5,020

RETAIL

Structure Name	Building Number	Square Feet	Estimated Sales
Warehouse	230	10,547	\$2,361,285
Sutler's Store	116	2,970	\$664,930
Exchange Admin. Offices	201	11,458	\$2,565,241
Exchange Admin. Offices	204	12,144	\$2,718,824
Warehouse and Offices	222	4,789	\$1,072,171
Warehouse and Offices	223	11,286	\$2,526,734
Warehouse	227	11,796	\$2,640,914
Dry Cleaners	228	4,277	\$957,544
Bank	229	2,762	\$618,362
Mine Loading	986	1,090	\$244,032
Guard Station/Office	988	500	\$111,941
Garage and Storage	1902	1,000	\$223,882

Total \$16,705,860

Appendix C: Presidio Retail, Restaurant, and Lodging Revenue Estimates

Table B.1: Annual Projected Revenues, Alternative B, Year 2000

(Expressed in 1993 Dollars)

Revenue Generators	Number of People	Estimated Ave. Annual Spending	Total Estimated Revenues
Residents	4,288	\$750	\$3,216,000
Employees	4,228	\$800	\$3,382,000
Visitors	4,500,000	\$2.50	\$11,250,000
Total	4,508,516		\$17,848,000

Guest Accommodations	Number	Occupancy Rate	Average Daily Rate
Dorm/Conf. Ctr./Apt. Rooms	11	64.00%	\$68
Guest Rooms	46	64.00%	\$68
Rooms in Guest Houses	117	64.00%	\$68

Resident Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	43.00%	\$323	\$1,382,880
Retail	57.00%	\$428	\$1,833,120
Total			\$3,216,000

Employee Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	55.00%	\$440	\$1,860,100
Retail	45.00%	\$360	\$1,521,900
Total			\$3,382,000

Visitor Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	30.00%	\$1	\$3,375,000
Retail	70.00%	\$2	\$7,875,000
Total			\$11,250,000

Sales Summary

Total Food and Beverage Sales	\$6,617,980
Total Retail Sales	\$11,230,020
Total Guest Room Revenues	\$2,764,000
Total Revenues	\$20,612,000

Sales by Square Footage	Square Feet	Estimated Sales	Estimated Sale/Sq.Ft.
Food and Beverage	65,019	\$6,617,980	\$101.79
Retail	105,527	\$11,230,020	\$106.42

Table B.2: Allocation of Sales By Square Footage, Alternative B, Year 2000

FOOD AND BEVERAGE

Structure Name	Building Number	Square Feet	Estimated Sales
Officers' Club	50	31,500	\$3,206,238
Service Club E.M.	135	24,115	\$2,454,553
Burger King	211	9294	(\$1,185,100)
Refreshment Stand	805	N/A	N/A

Total **\$4,475,691**

Structure Name	Sq.Ft Per Seat.	Percent Allocated for Seating	Number of Seats	Sales Per Seat
Officers' Club	18	40.00%	700	\$4,580
Service Club E.M.	18	40.00%	536	\$4,580
Burger King	15	60.00%	372	(\$3,188)
Refreshment Stand	15	N/A	N/A	N/A

RETAIL

Structure Name	Building Number	Square Feet	Estimated Sales
Exchange Store	201	11,458	\$1,219,343
Exchange Store	204	12,144	\$1,292,346
Bakery	228	4,277	\$455,152
Warehouse	230	10,547	\$1,122,395
Main Post Exchange	605	42,319	\$4,503,522
Main Exchange	606	7,416	\$789,199
New Branch Exchange	1158	6,034	\$642,129
Post Exchange Assembly	1226	11,332	\$1,205,934

Total **\$11,230,020**

Appendix C: Presidio Retail, Restaurant, and Lodging Revenue Estimates

Table B.3: Annual Projected Revenues, Alternative B, Year 2010

(Expressed in 1993 Dollars)

Revenue Generators	Number of People	Estimated Ave. Annual Spending	Total Estimated Revenues
Residents	4,288	\$750	\$3,216,000
Employees	5,438	\$800	\$4,350,000
Visitors	6,900,000	\$2.50	\$17,250,000
Total	6,909,726		\$24,816,000

Guest Accommodations	Number	Occupancy Rate	Average Daily Rate
Dorm/Conf. Ctr./Apt. Rooms	11	98.00%	\$68
Guest Rooms	46	98.00%	\$68
Rooms in Guest Houses	117	98.00%	\$68

Resident Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	43.00%	\$323	\$1,382,880
Retail	57.00%	\$428	\$1,833,120
Total			\$3,216,000

Employee Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	55.00%	\$440	\$2,392,500
Retail	45.00%	\$360	\$1,957,500
Total			\$4,350,000

Visitor Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	30.00%	\$1	\$5,175,000
Retail	70.00%	\$2	\$12,075,000
Total			\$17,250,000

Sales Summary

Total Food and Beverage Sales	\$8,950,380
Total Retail Sales	\$15,865,620
Total Guest Room Revenues	\$4,232,000
Total Revenues	\$29,048,000

Sales by Square Footage	Square Feet	Estimated Sales	Estimated Sale/Sq.Ft.
Food and Beverage	65,019	\$8,950,380	\$137.66
Retail	105,527	\$15,865,620	\$150.35

Table B.4: Allocation of Sales By Square Footage, Alternative B, Year 2010**FOOD AND BEVERAGE**

Structure Name	Building Number	Square Feet	Estimated Sales
Officers' Club	50	31,500	\$4,336,224
Service Club E.M.	135	24,115	\$3,319,621
Burger King	211	9294	\$1,480,700
Refreshment Stand	805	N/A	N/A
Total			\$9,136,545

Structure Name	Sq.Ft Per Seat.	Percent Allocated for Seating	Number of Seats	Sales Per Seat
Officers' Club	18	40.00%	700	\$6,195
Service Club E.M.	18	40.00%	536	\$6,195
Burger King	15	60.00%	372	\$3,983
Refreshment Stand	15	N/A	N/A	N/A

RETAIL

Structure Name	Building Number	Square Feet	Estimated Sales
Exchange Store	201	11,458	\$1,722,671
Exchange Store	204	12,144	\$1,825,808
Bakery	228	4,277	\$643,032
Warehouse	230	10,547	\$1,585,705
Main Post Exchange	605	42,319	\$6,362,515
Main Exchange	606	7,416	\$1,114,970
New Branch Exchange	1158	6,034	\$907,191
Post Exchange Assembly	1226	11,332	\$1,703,727
Total			\$15,865,620

Appendix C: Presidio Retail, Restaurant, and Lodging Revenue Estimates

Table C.1: Annual Projected Revenues, Alternative C, Year 2000

(Expressed in 1993 Dollars)

Revenue Generators	Number of People	Estimated Ave. Annual Spending	Total Estimated Revenues
Residents	3,485	\$750	\$2,614,000
Employees	2,646	\$800	\$2,117,000
Visitors	5,200,000	\$2.50	\$13,000,000
Total	5,206,131		\$17,731,000

Guest Accommodations	Number	Occupancy Rate	Average Daily Rate
Dorm/Conf. Ctr./Apt. Rooms	221	64.00%	\$68
Guest Rooms	28	64.00%	\$68
Rooms in Guest Houses	162	64.00%	\$68

Resident Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	43.00%	\$323	\$1,124,020
Retail	57.00%	\$428	\$1,489,980
Total			\$2,614,000

Employee Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	55.00%	\$440	\$1,164,350
Retail	45.00%	\$360	\$952,650
Total			\$2,117,000

Visitor Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	30.00%	\$1	\$3,900,000
Retail	70.00%	\$2	\$9,100,000
Total			\$13,000,000

Sales Summary

Total Food and Beverage Sales	\$6,188,370
Total Retail Sales	\$11,542,630
Total Guest Room Revenues	\$3,099,000
Total Revenues	\$20,830,000

Sales by Square Footage	Square Feet	Estimated Sales	Estimated Sale/Sq.Ft.
Food and Beverage	78,448	\$6,188,370	\$78.88
Retail	76,559	\$11,542,630	\$150.77

Table C.2: Allocation of Sales By Square Footage, Alternative C, Year 2000

FOOD AND BEVERAGE

Structure Name	Building Number	Square Feet	Estimated Sales
Officers' Club	50	31,500	\$2,484,877
Service Club E.M.	135	24,115	\$1,902,312
Enlisted Men's Barracks	1208	22,833	\$1,801,181
Total			\$6,188,370

Structure Name	Sq.Ft Per Seat.	Percent Allocated for Seating	Number of Seats	Sales Per Seat
Officers' Club	18	40.00%	700	\$3,550
Service Club E.M.	18	40.00%	536	\$3,550
Enlisted Men's Barracks	15	40.00%	609	\$2,958

RETAIL

Structure Name	Building Number	Square Feet	Estimated Sales
Exchange Store	201	11,458	\$1,727,497
Exchange Store	204	12,144	\$1,830,924
Warehouse	222	4,789	\$722,027
Warehouse	223	11,286	\$1,701,565
Warehouse	227	11,796	\$1,778,457
Bakery	228	4,277	\$644,834
Bakery	229	2,762	\$416,421
Warehouse	230	10,547	\$1,590,148
Dormitory	1903	7,500	\$1,130,758
Total			\$11,542,630

Appendix C: Presidio Retail, Restaurant, and Lodging Revenue Estimates

Table C.3: Annual Projected Revenues, Alternative C, Year 2010

(Expressed in 1993 Dollars)

Revenue Generators	Number of People	Estimated Ave. Annual Spending	Total Estimated Revenues
Residents	1,015	\$750	\$761,000
Employees	3,176	\$800	\$2,541,000
Visitors	7,300,000	\$2.50	\$18,250,000
Total	7,304,191		\$21,552,000

Guest Accommodations	Number	Occupancy Rate	Average Daily Rate
Dorm/Conf. Ctr./Apt. Rooms	221	90.00%	\$68
Guest Rooms	28	90.00%	\$68
Rooms in Guest Houses	162	90.00%	\$68

Resident Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	43.00%	\$323	\$327,230
Retail	57.00%	\$428	\$433,770
Total			\$761,000

Employee Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	55.00%	\$440	\$1,397,550
Retail	45.00%	\$360	\$1,143,450
Total			\$2,541,000

Visitor Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	30.00%	\$1	\$5,475,000
Retail	70.00%	\$2	\$12,775,000
Total			\$18,250,000

Sales Summary

Total Food and Beverage Sales	\$7,199,780
Total Retail Sales	\$14,352,220
Total Guest Room Revenues	\$9,181,000
Total Revenues	\$30,733,000

Sales by Square Footage	Square Feet	Estimated Sales	Estimated Sale/Sq.Ft.
Food and Beverage	78,448	\$7,199,780	\$91.78
Retail	76,559	\$14,352,220	\$187.47

Table C.4: Allocation of Sales By Square Footage, Alternative C, Year 2010**FOOD AND BEVERAGE**

Structure Name	Building Number	Square Feet	Estimated Sales
Officers' Club	50	31,500	\$2,890,999
Service Club E.M.	135	24,115	\$2,213,220
Enlisted Men's Barracks	1208	22,833	\$2,095,561
Total			\$7,199,780

Structure Name	Sq.Ft Per Seat.	Percent Allocated for Seating	Number of Seats	Sales Per Seat
Officers' Club	18	40.00%	700	\$4,130
Service Club E.M.	18	40.00%	536	\$4,130
Enlisted Men's Barracks	15	40.00%	609	\$3,442

RETAIL

Structure Name	Building Number	Square Feet	Estimated Sales
Exchange Store	201	11,458	\$2,147,987
Exchange Store	204	12,144	\$2,276,589
Warehouse	222	4,789	\$897,775
Warehouse	223	11,286	\$2,115,743
Warehouse	227	11,796	\$2,211,351
Bakery	228	4,277	\$801,793
Bakery	229	2,762	\$517,781
Warehouse	230	10,547	\$1,977,205
Dormitory	1903	7,500	\$1,405,996
Total			\$14,352,220

Appendix C: Presidio Retail, Restaurant, and Lodging Revenue Estimates

Table D.1: Annual Projected Revenue, Alternative D, Year 2000

(Expressed in 1993 Dollars)

Revenue Generators	Number of People	Estimated Ave. Annual Spending	Total Estimated Revenues
Residents	3,644	\$750	\$2,733,000
Employees	4,131	\$800	\$3,305,000
Visitors	6,190,000	\$2.50	\$15,475,000
Total	6,197,775		\$21,513,000

Guest Accommodations	Number	Occupancy Rate	Average Daily Rate
Dorm/Conf. Ctr./Apt. Rooms	247	64.00%	\$68
Guest Rooms	28	64.00%	\$68
Rooms in Guest Houses	117	64.00%	\$68

Resident Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	43.00%	\$323	\$1,175,190
Retail	57.00%	\$428	\$1,557,810
Total			\$2,733,000

Employee Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	55.00%	\$440	\$1,817,750
Retail	45.00%	\$360	\$1,487,250
Total			\$3,305,000

Visitor Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	30.00%	\$1	\$4,642,500
Retail	70.00%	\$2	\$10,832,500
Total			\$15,475,000

Sales Summary

Total Food and Beverage Sales	\$7,635,440
Total Retail Sales	\$13,877,560
Total Guest Room Revenues	\$6,227,000
Total Revenues	\$27,740,000

Sales by Square Footage	Square Feet	Estimated Sales	Estimated Sale/Sq.Ft.
Food and Beverage	78,448	\$7,635,440	\$97.33
Retail	99,271	\$13,877,560	\$139.79

Appendix C: Presidio Retail, Restaurant, and Lodging Revenue Estimates

Table D.2: Allocation of Sales By Square Footage, Alternative D, Year 2000

FOOD AND BEVERAGE

Structure Name	Building Number	Square Feet	Estimated Sales
Officers' Club	50	31,500	\$3,065,934
Service Club E.M.	135	24,115	\$2,347,143
Enlisted Men's Barracks	1208	22,833	\$2,222,364
Total			\$7,635,440

Structure Name	Sq.Ft Per Seat.	Percent Allocated for Seating	Number of Seats	Sales Per Seat
Officers' Club	18	40.00%	700	\$4,380
Service Club E.M.	18	40.00%	536	\$4,380
Enlisted Men's Barracks	15	40.00%	609	\$3,650

RETAIL

Structure Name	Building Number	Square Feet	Estimated Sales
Post Trader, Sutler's House	116	2,970	\$415,190
Exchange Store	201	11,458	\$1,601,768
Exchange Store	204	12,144	\$1,697,667
Warehouse	222	4,789	\$669,477
Warehouse	223	11,286	\$1,577,723
Warehouse	227	11,796	\$1,649,018
Bakery	228	4,277	\$597,902
Bakery	229	2,762	\$386,113
Warehouse	230	10,547	\$1,474,415
New Branch Exchange	1158	6,034	\$843,521
NCO/Enlisted Family	1705	9,306	\$1,300,930
NCO/Enlisted Family	1706	4,402	\$615,376
Dormitory	1903	7,500	\$1,048,460
Total			\$13,877,560

Appendix C: Presidio Retail, Restaurant, and Lodging Revenue Estimates

Table D.3: Annual Projected Revenues, Alternative D, Year 2010

(Expressed in 1993 Dollars)

Revenue Generators	Number of People	Estimated Ave. Annual Spending	Total Estimated Revenues
Residents	3,468	\$750	\$2,601,000
Employees	5,088	\$800	\$4,070,000
Visitors	8,000,000	\$2.50	\$20,000,000
Total	8,008,556		\$26,671,000

Guest Accommodations	Number	Occupancy Rate	Average Daily Rate
Dorm/Conf. Ctr./Apt. Rooms	577	83.00%	\$68
Guest Rooms	28	83.00%	\$68
Rooms in Guest Houses	162	83.00%	\$68

Resident Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	43.00%	\$323	\$1,118,430
Retail	57.00%	\$428	\$1,482,570
Total			\$2,601,000

Employee Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	55.00%	\$440	\$2,238,500
Retail	45.00%	\$360	\$1,831,500
Total			\$4,070,000

Visitor Sales Detail	Percentage	Amount Per Person	Estimated Sales Breakdown
Food & Beverage	30.00%	\$1	\$6,000,000
Retail	70.00%	\$2	\$14,000,000
Total			\$20,000,000

Sales Summary

Total Food and Beverage Sales	\$9,356,930
Total Retail Sales	\$17,314,070
Total Guest Room Revenues	\$15,801,000
Total Revenues	\$42,472,000

Sales by Square Footage	Square Feet	Estimated Sales	Estimated Sale/Sq.Ft.
Food and Beverage	78,448	\$9,356,930	\$119.28
Retail	99,271	\$17,314,070	\$174.41

Table D.4: Allocation of Sales By Square Footage, Alternative D, Year 2010**FOOD AND BEVERAGE**

Structure Name	Building Number	Square Feet	Estimated Sales
Officers' Club	50	31,500	\$3,757,180
Service Club E.M.	135	24,115	\$2,876,330
Enlisted Men's Barracks	1208	22,833	\$2,723,419

Total \$9,356,930

Structure Name	Sq.Ft Per Seat.	Percent Allocated for Seating	Number of Seats	Sales Per Seat
Officers' Club	18	40.00%	700	\$5,367
Service Club E.M.	18	40.00%	536	\$5,367
Enlisted Men's Barracks	15	40.00%	609	\$4,473

RETAIL

Structure Name	Building Number	Square Feet	Estimated Sales
Post Trader, Sutler's House	116	2,970	\$518,004
Exchange Store	201	11,458	\$1,998,415
Exchange Store	204	12,144	\$2,118,061
Warehouse	222	4,789	\$835,260
Warehouse	223	11,286	\$1,968,416
Warehouse	227	11,796	\$2,057,366
Bakery	228	4,277	\$745,961
Bakery	229	2,762	\$481,726
Warehouse	230	10,547	\$1,839,525
New Branch Exchange	1158	6,034	\$1,052,403
NCO/Enlisted Family	1705	9,306	\$1,623,080
NCO/Enlisted Family	1706	4,402	\$767,762
Dormitory	1903	7,500	\$1,308,091

Total \$17,314,070

APPENDIX D: DETAILED PRESIDIO GUEST LODGING ASSUMPTIONS

Appendix D: Guest Housing Visitor Accommodation Assumptions

	Rooms	Capacity(Persons)	Alternative A		Alternative B		Alternative C		Alternative D	
			Guest Capacity 2000	Guest Capacity 2010	Guest Capacity 2000	Guest Capacity 2010	Guest Capacity 2000	Guest Capacity 2010	Guest Capacity 2000	Guest Capacity 2010
Guest Dorm Facilities (a)										
Fort Scott Parade	200	250	250	250	0	0	250	250	250	250
Barnard Hall	13	13	13	13	0	0	13	13	13	13
MP Funston Guest House	4	6	6	6	0	0	6	6	6	6
WWII Barracks	56	70	70	70	0	0	0	0	0	0
PHSH, Bld 1801 Main (b)	180	180	0	180	0	0	0	0	0	180
PHSH, Bld 1801 Wings (c)	150	150	0	0	0	0	0	0	0	150
PHSH, Bld 1808	30	30	0	0	0	0	0	0	30	30
Bldg. 1903	11	17	0	0	17	17	0	0	0	0
Bldg. 682	4	40	0	0	0	0	40	40	0	0
Subtotal - Guests in Conference Center/Dorm Facilities			339	519	17	17	309	309	299	629
Guest Rooms (d)										
Pershing Hall	28	35	35	35	35	35	35	35	35	35
Scott Hall	18	23	0	0	23	23	0	0	0	0
Subtotal - Guests in Guest Room Accommodations			35	35	58	58	35	35	35	35
Guest Houses (e)										
Quarry (42 units)	n.a.	90	90	90	0	0	0	0	90	90
Kobbe (15 units)	45	56	0	56	0	0	56	56	0	56
Pilots Row (13 units)	39	49	49	49	49	49	49	49	49	49
Funston (26 units)	78	98	98	98	98	98	98	98	98	98
Subtotal - Guests in Guest House Accommodations			237	293	147	147	203	203	237	293
TOTAL GUEST FACILITIES CAPACITY (PERSONS)			611	847	222	222	547	547	571	957
Estimated Dorm/Apartment/Conf. Ctr. Rooms in Service			273	453	11	11	221	221	247	577
Estimated Guest Rooms In Service			28	28	46	46	28	28	28	28
Estimated Guest House Rooms in Service (f)			117	162	117	117	162	162	117	162

Notes:

- (a) Capacity estimated by NPS.
- (b) Assumes conference center accommodations for 180 persons would not be utilized until after the year 2000.
- (c) Assumes conference center accommodations for 150 persons would not be utilized until after the year 2000.
- (d) Assumes an average of 1.25 persons per room.
- (e) Except for Quarry housing units, assumes an average of 3 rooms per unit, and 1.25 persons per room.
- (f) For revenue estimating purposes, does not include Quarry Housing rooms.

Sources: National Park Service, Bay Area Economics.



As the nation's principal conservation agency, the Department of the Interior has responsibility for most of our nationally owned public lands and natural resources. This includes fostering sound use of our land and water resources; protecting our fish, wildlife, and biological diversity; preserving the environmental and cultural values of our national parks and historical places; and providing for the enjoyment of life through outdoor recreation. The department assesses our energy and mineral resources and works to ensure that their development is in the best interests of all our people by encouraging stewardship and citizen participation in their care. The department also has a major responsibility for American Indian reservation communities and for people who live in island territories under U.S. administration.

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