

City and County
of San Francisco

Economic Recovery Task Force

San Francisco Economic Recovery Task Force (ERTF)

KICK-OFF MEETING

April 24, 2020

ERTF Kick Off Meeting Agenda

- › Kick off and resources
- › Fiscal context
- › Health context
- › Role of Task Force members and process overview
- › Review of initial survey results
- › Q&A with Task Force

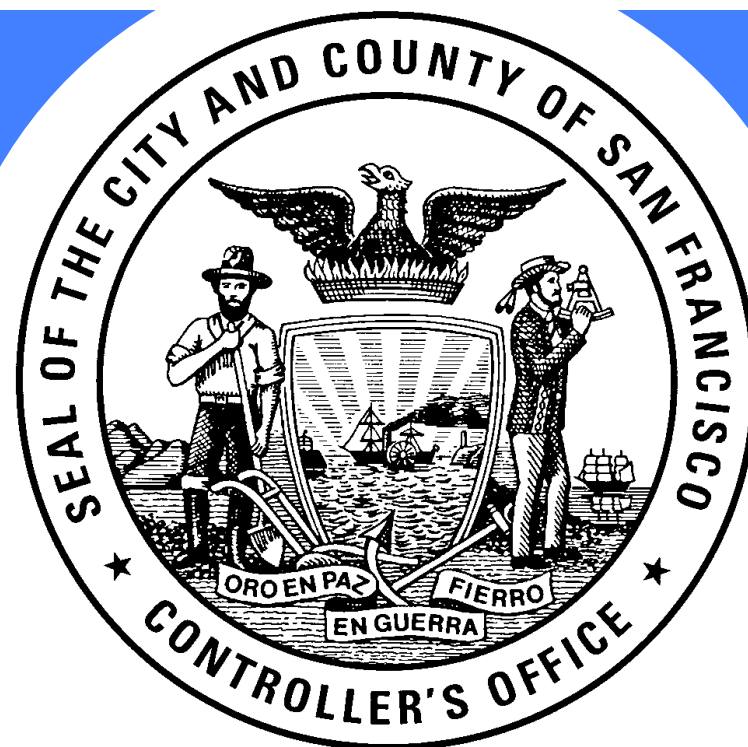
Kick-off and resources

Kick-Off and Resources

- › Welcome and Introductions
- › Melissa Whitehouse leading the staff support for the effort on the city side – please reach out anytime
- › You can also email the project team: RecoverySF@sfgov.org
- › Meeting materials and resources will be posted
<https://www.onesanfrancisco.org/covid-19-recovery>

Fiscal context

City Economic Outlook



CITY & COUNTY OF SAN FRANCISCO

Office of the Controller

Ted Egan, Ph.D.
Chief Economist

April 24, 2020

Direct Impacts of the Shelter-in-Place Order

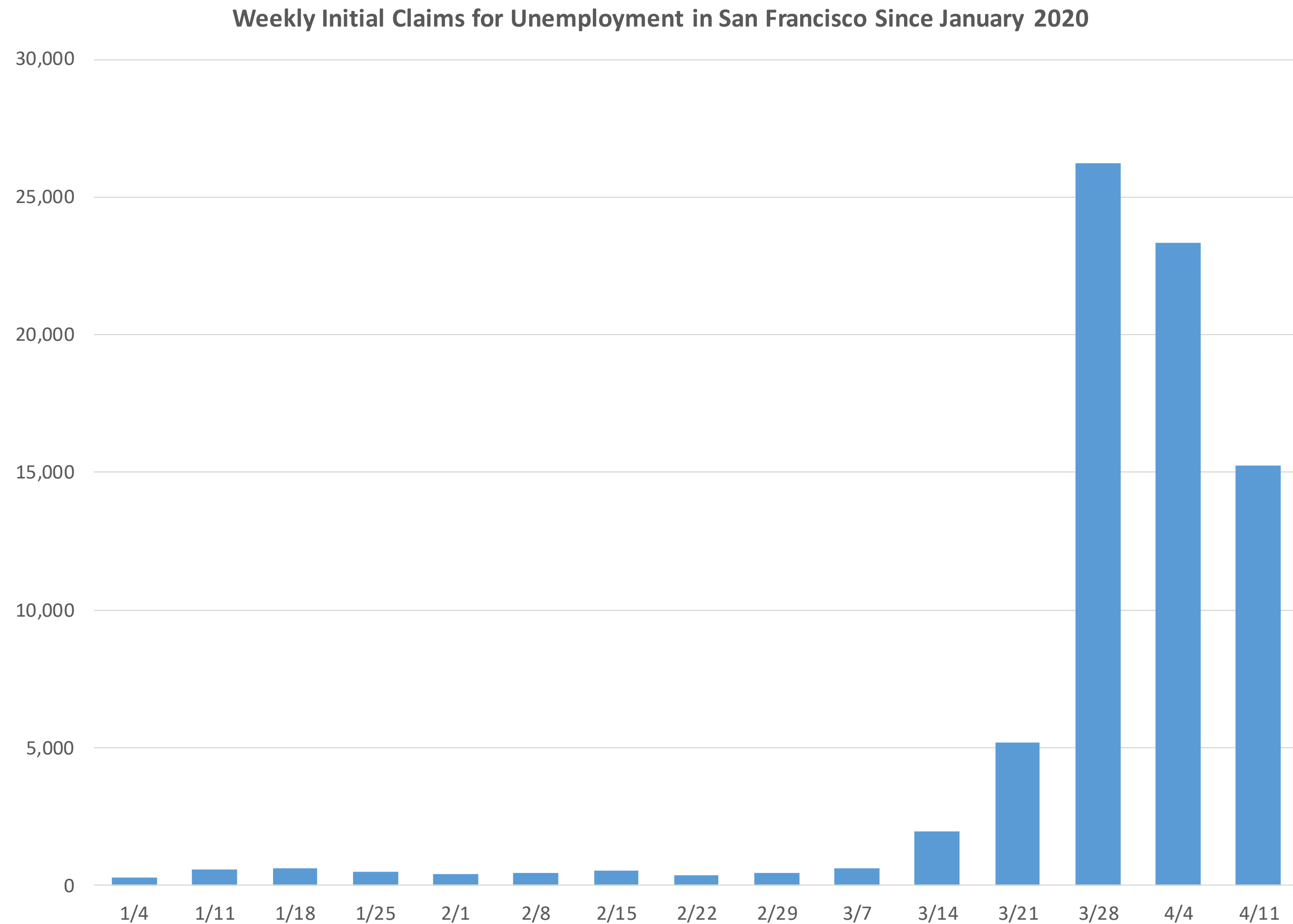
Fully-Impacted Industries, by Sector

	Number of Establishments	SF Employment	1 month SF Gross Receipts (\$M)	1-month wage income (\$M)
Arts, Entertainment, and Recreation	658	14,441	\$150	\$77
Certain Services	1,053	8,631	\$22	\$27
Construction	130	4,948	\$160	\$53
Food Services	391	4,584	\$26	\$11
Information	19	430	\$24	\$1
Manufacturing	821	12,992	\$193	\$137
Private Education and Health Services	447	5,136	\$12	\$17
Retail Trade	747	8,539	\$344	\$29
Transportation and Warehousing	30	1,035	\$6	\$8
Wholesale Trade	411	4,983	\$288	\$30
Sub-Total	4,707	65,719	\$1,225	\$389

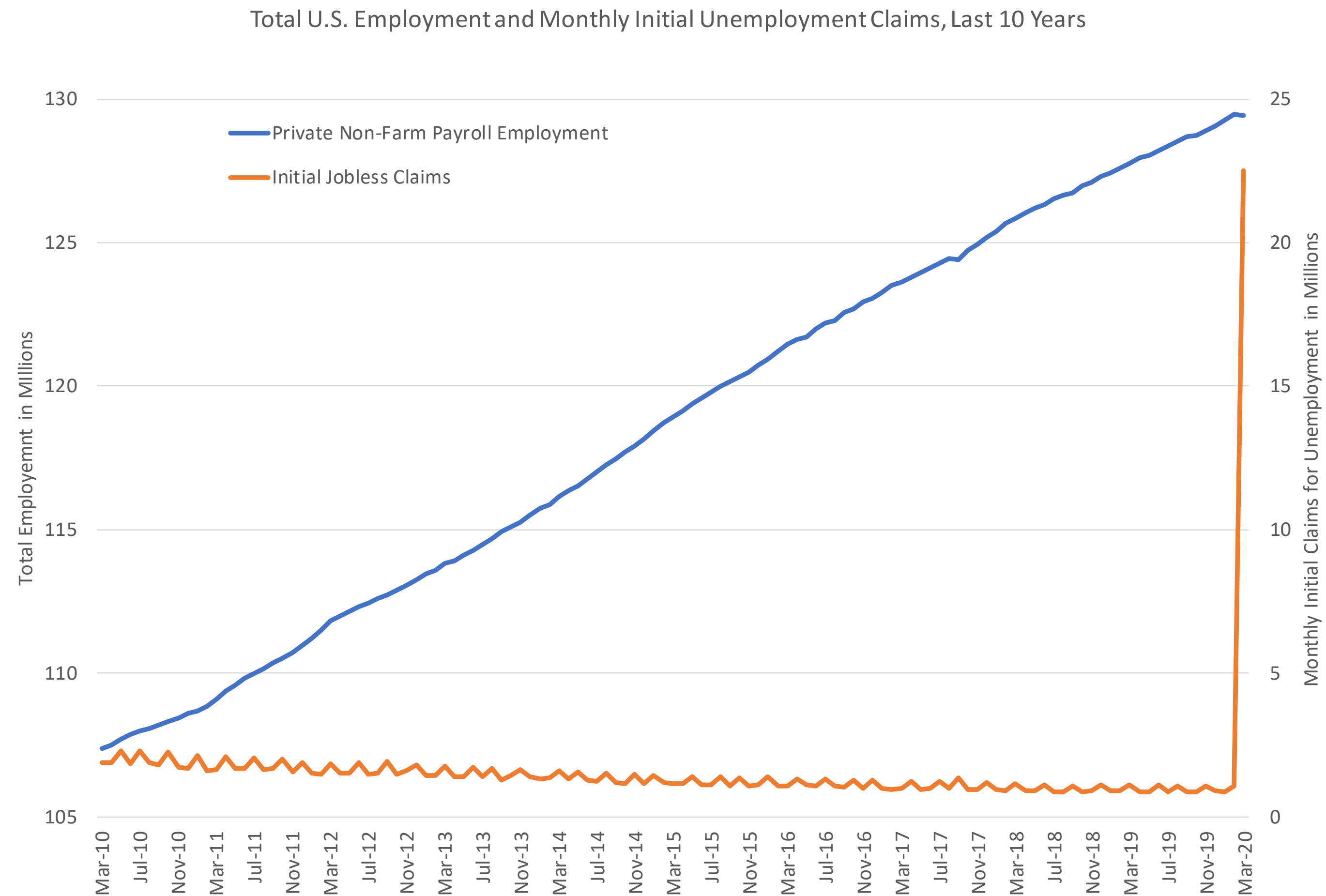
Partially-Impacted Industries, by Sector

	Number of Establishments	SF Employment	1 month SF Gross Receipts (\$M)	1-month wage income (\$M)
Accommodations	316	16,305	\$317	\$71
Certain Services	2,835	3,111	\$8	\$10
Construction	813	11,087	\$359	\$91
Food Services	3,263	55,404	\$313	\$150
Real Estate and Rental and Leasing Services	2,138	15,310	\$887	\$148
Sub-Total	9,365	101,217	\$1,885	\$470
Grand Total	14,072	166,936	\$3,109	\$859

More than 70,000 SF Unemployment Claims Since Mid-March

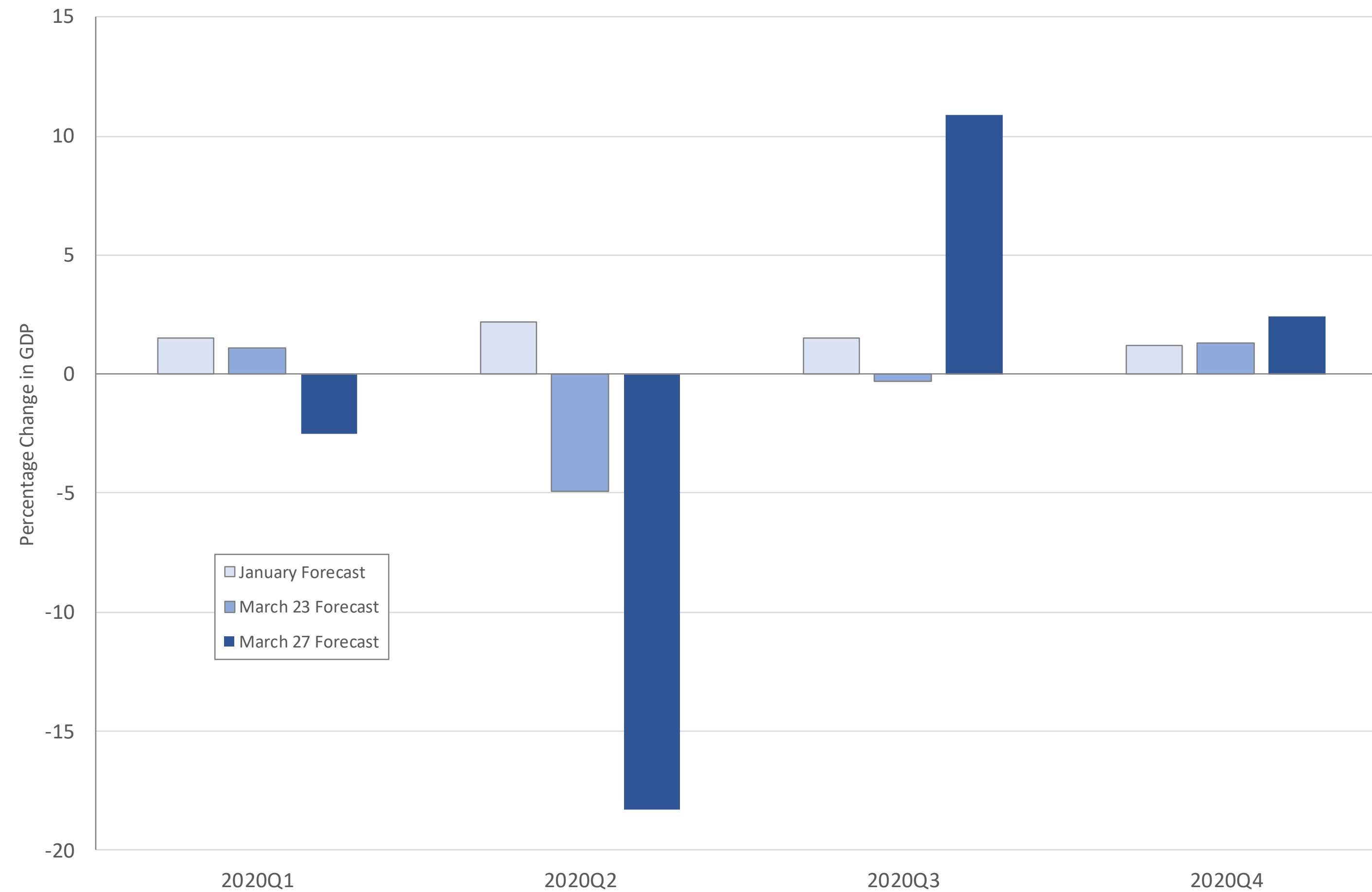


Nationally - March Jobless Claims Equaled 10 Years of Job Growth

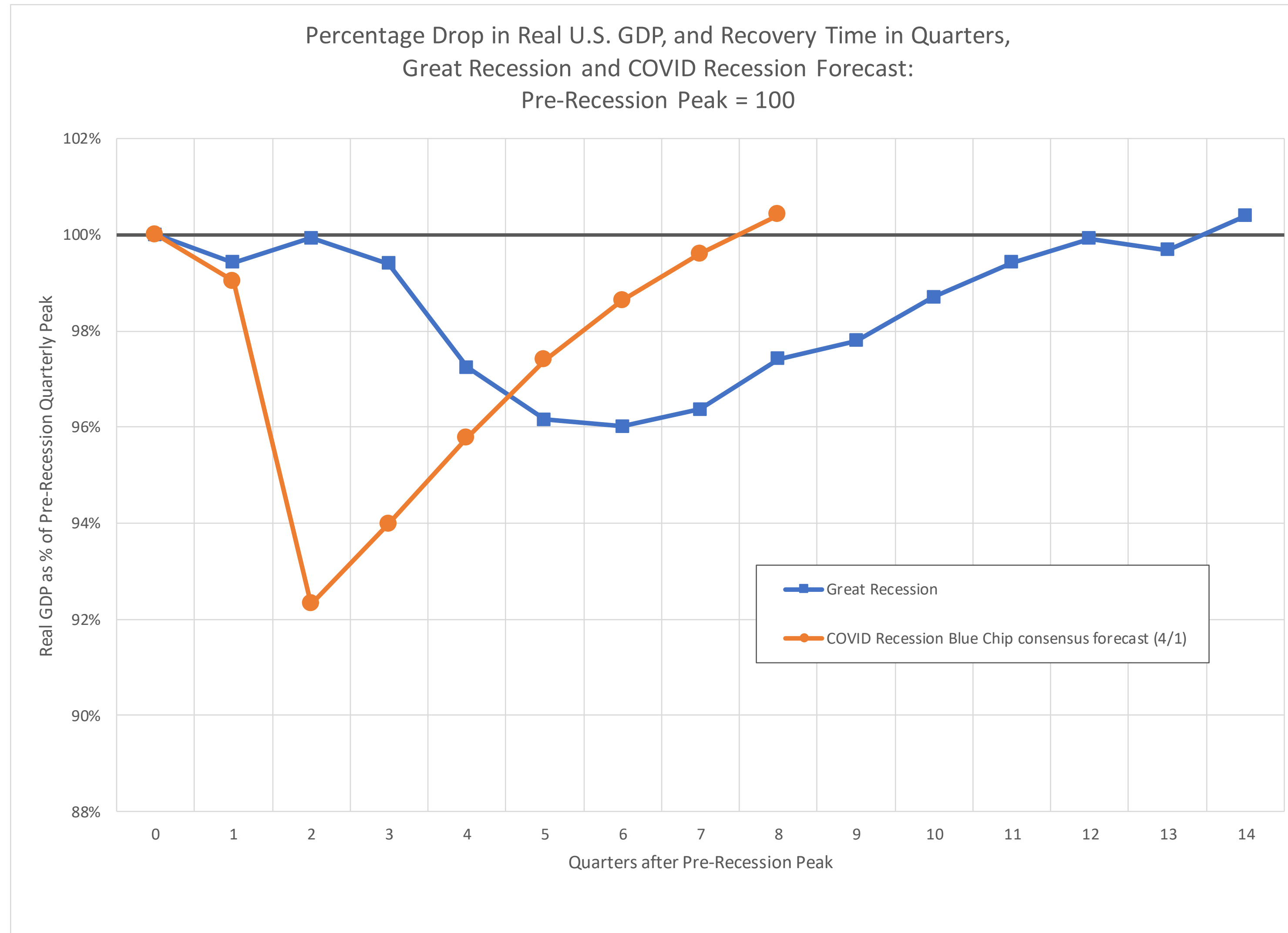


Forecasts Have Been Changing Quickly

Moody's Forecast Change in U.S. Real GDP for 2020
Annualized, Quarter-to-Quarter



April Blue Chip Consensus: Sharp & Short Recession



The Blue Chip Forecast Applied to San Francisco

	2019	2020	2021
SF Real GDP growth	3.0%	-3.2%	4.0%
SF Employment Growth, Private Non-Farm	2.1%	-3.9%	2.6%
SF Unemployment Rate	2.2%	6.9%	4.3%
SF Nominal GDP growth	4.7%	-2.2%	6.1%
SF Nominal Wages & Salaries, Private Non-Farm	5.7%	-1.0%	6.5%

A Big If?

	<i>Brief virus emergency:</i> Single peak in April or May, abatement in June	<i>Long virus emergency:</i> Late peaks (or multiple peaks) until widespread vaccination
<i>Mild economic shock:</i> Consumer spending returns quickly; oil price dividend; stimulus fully offsets income shock; no inflation	V-shaped recession —real GDP growth in Q3, year-over-year growth from 2019 to 2020; "normal" GDP growth in 2021; slower jobs recovery (2022)	U-Shaped recession —with the length caused by health and not economic factors.
<i>Severe economic shock:</i> persistent decline in consumer confidence and spending; bankruptcies shake credit markets and raise capital costs; long-term consumer shifts lead to mass unemployment; limited fiscal stimulus.	U-Shaped recession- a sharp, short decline followed by a slow recovery: real GDP decline in Q3, slow growth through mid-2021; 2023/4 jobs recovery	L-shaped recession - long period of social and economic disruption leads to permanent changes in consumption, slow structural adjustment

Health context

San Francisco COVID-19 Health Orders & Executive Orders:

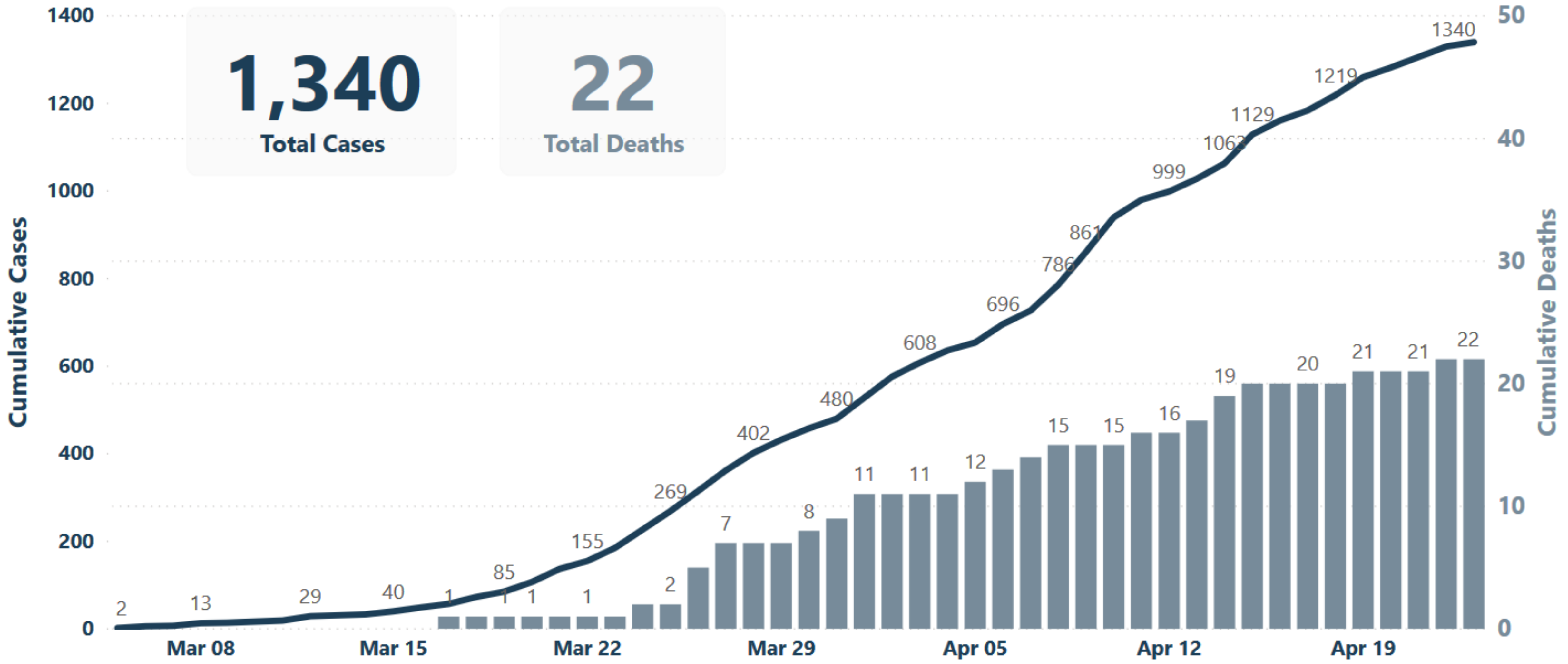
- › February 25: Mayor Breed Announces a Local Emergency
- › March 6: Declaration of Local Health Emergency
- › March 7: Prohibiting Gatherings at City-Owned Locations
- › March 10: Environmental Cleaning Standards for SROs
- › March 11: Prohibiting Large Gatherings >1,000 Persons
- › March 12: Excluding Visitors to Skilled Nursing Facilities at High Risk
- › March 12: Restricting Visitors and Non-Essential Personnel from Laguna Honda and ZSFG Skilled Nursing Facility
- › March 13: Prohibiting Large Gatherings >100 Persons
- › March 14: Limitations on Hospital Visitors
- › March 16: Shelter in Place (through April 7)
- › March 18: Moratorium on Routine Medical Appointments and Elective Surgery
- › March 19: Limitations on Residential Facility Visitors
- › March 24: Labs Conducting COVID-19 Diagnostic Tests to Report All Results to Local and State Public Health Authorities
- › March 24: Protective Quarantine for Laguna Honda Hospital
- › March 31: Shelter in Place (extended through May 3)
- › April 2: Safety Guidance for Construction-Related Essential Businesses
- › April 17: General Requirement of Members of the Public and Workers to Wear Face Coverings



San Francisco COVID-19 RESPONSE

1,340
Total Cases

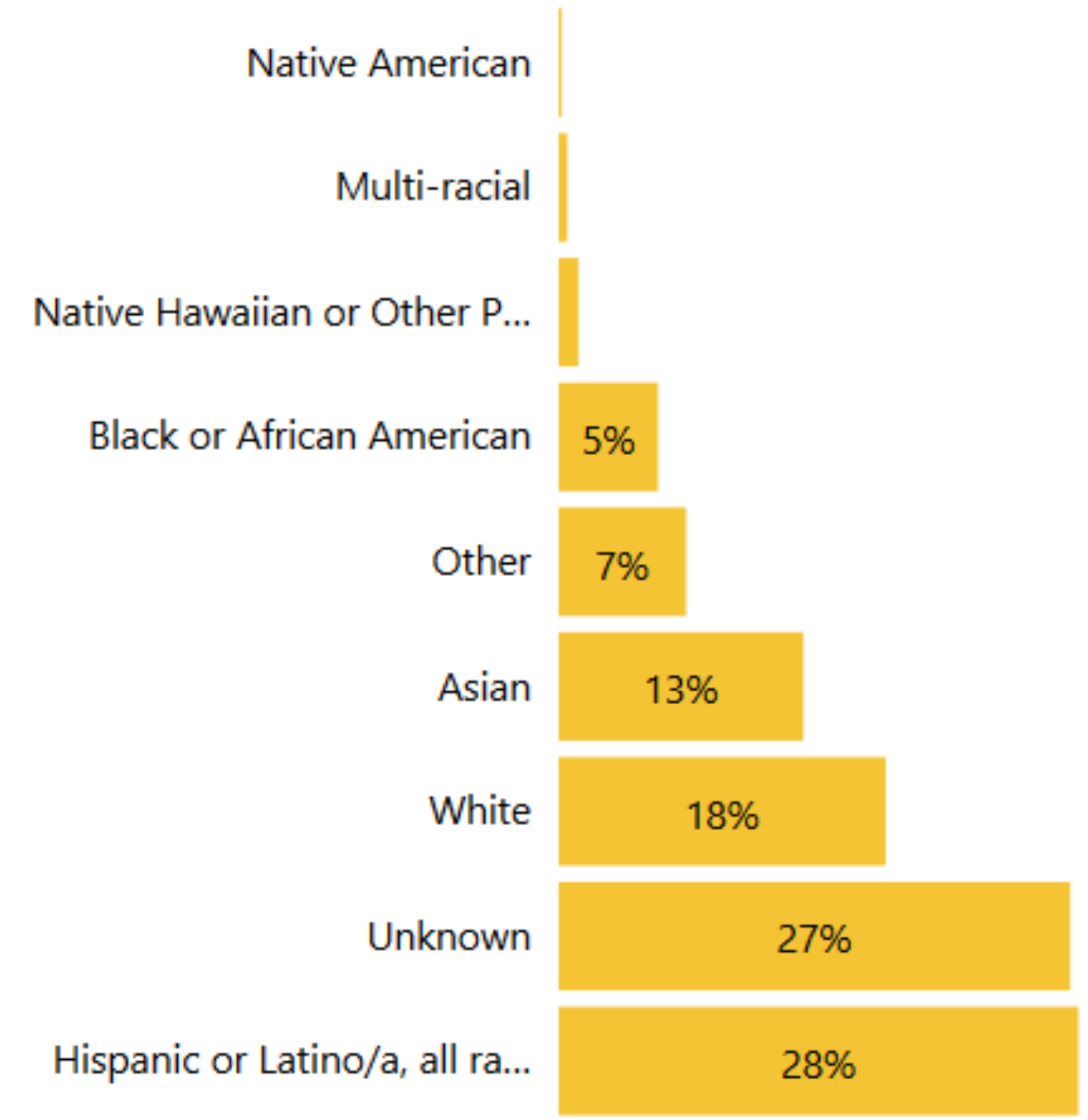
22
Total Deaths



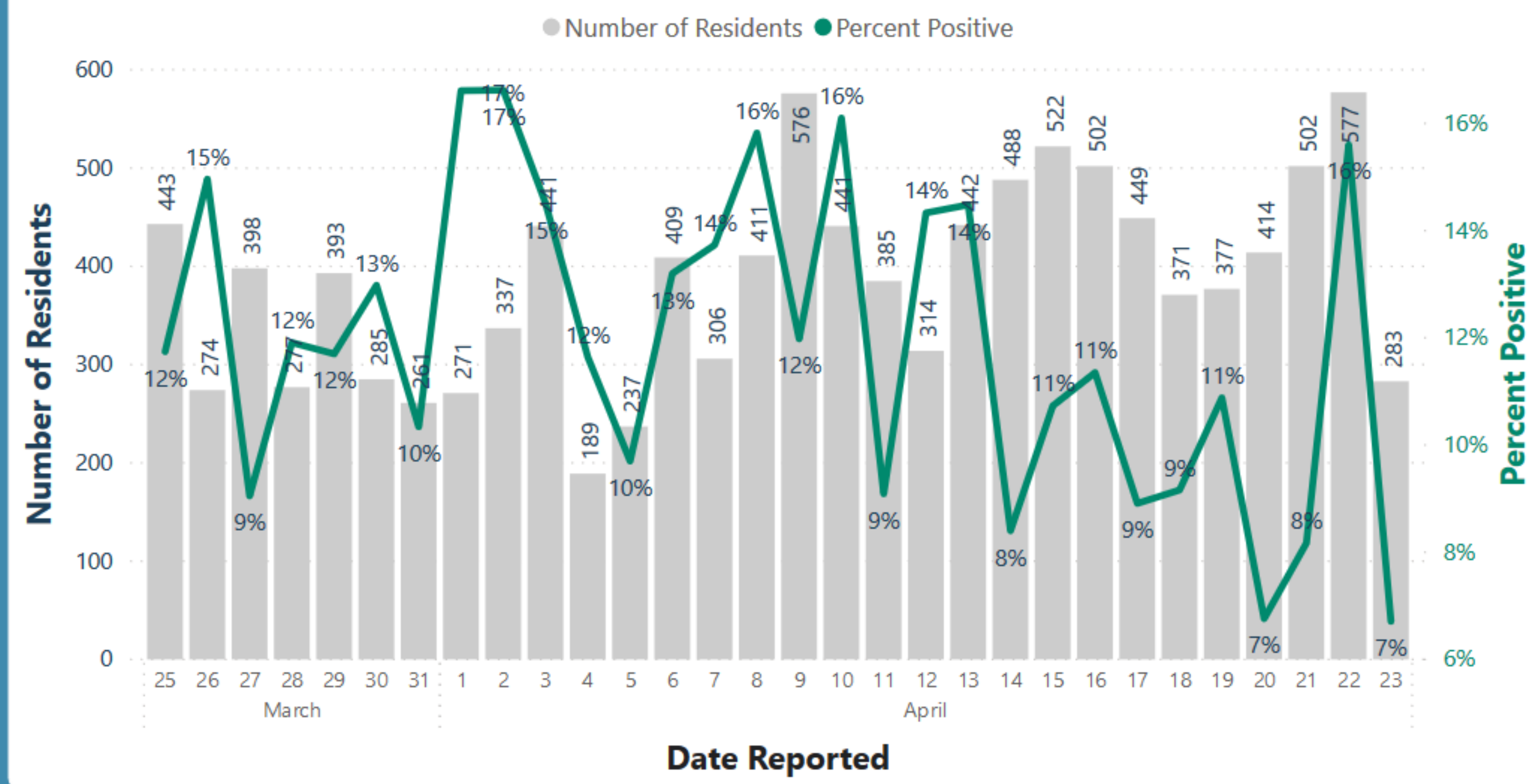


San Francisco COVID-19 RESPONSE

Cases - Race/ Ethnicity



Unique SF Residents Tested & Proportion of Positive Results Each Day



Cumulative Tests

13,168

Overall Percent Positive

12%

Choose a Date Range:

Last Five Weeks



San Francisco COVID-19 RESPONSE

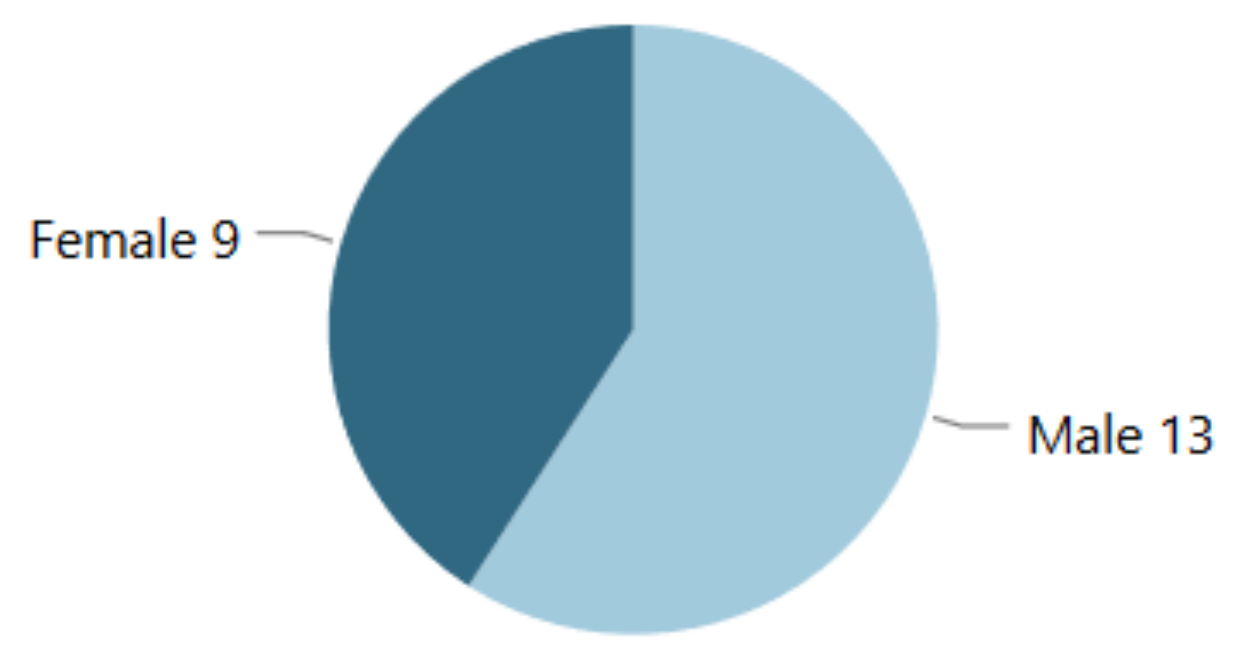
Demographics For:

Deaths

COVID-19 Deaths

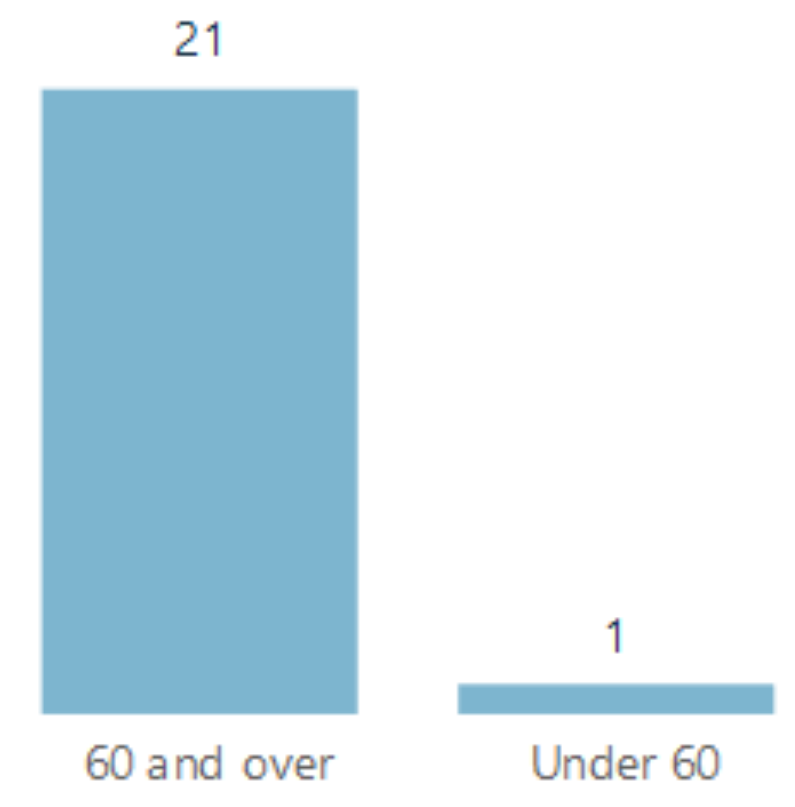
22

Deaths - Gender

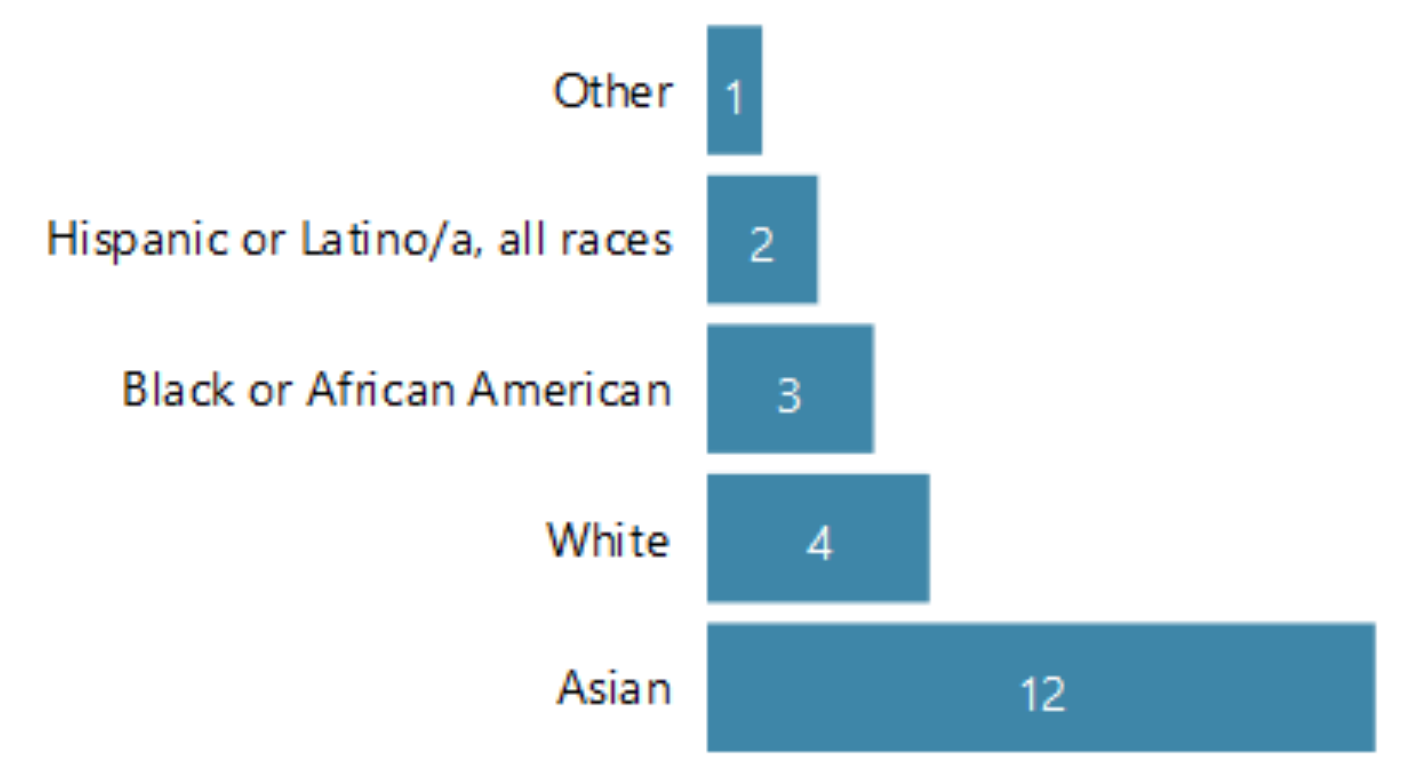


To date, no cases reported among trans women or trans men.

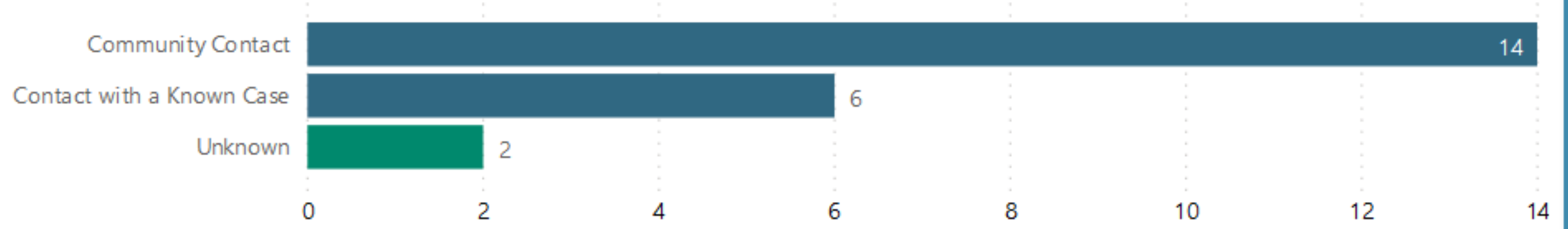
Deaths - Age Group



Deaths - Race/ Ethnicity



Deaths - Transmission Category



Deaths - Underlying Conditions





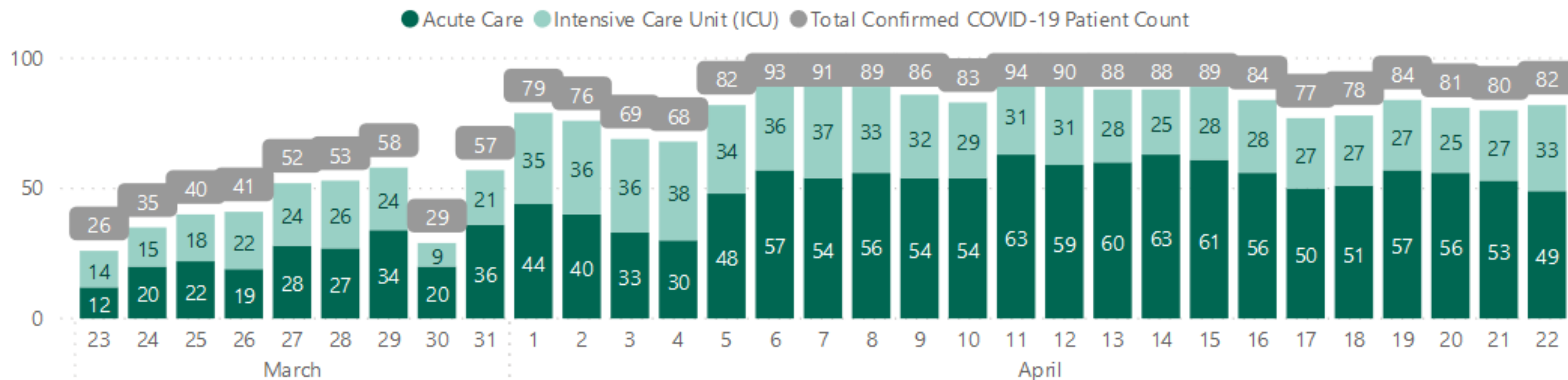
San Francisco COVID-19 RESPONSE

Hospitalizations

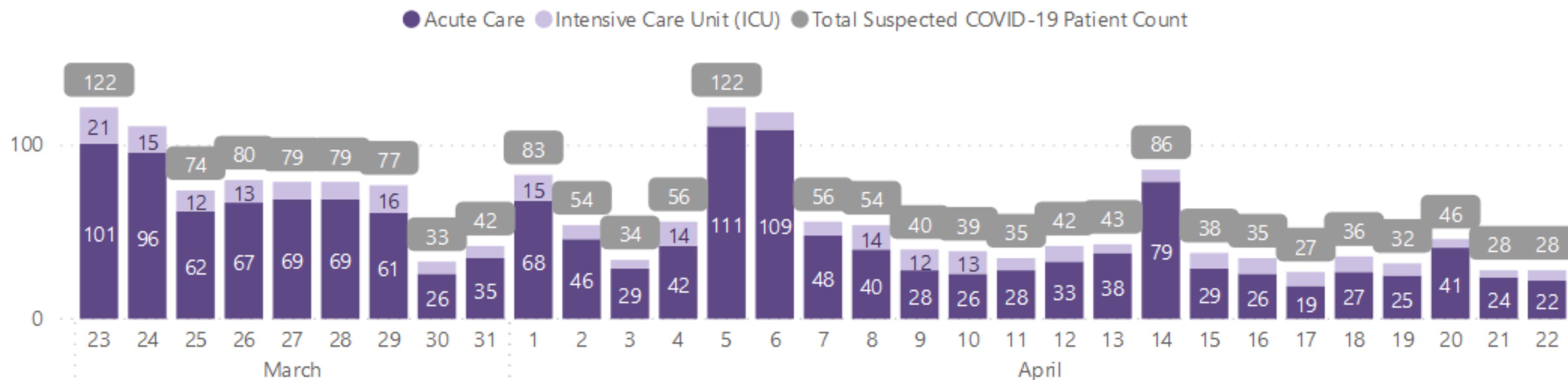
Patients who are suspected of being COVID-19 positive meet the [Centers for Disease Control and Prevention](#) guidelines based on their symptoms and other available information when they are admitted.

Note: Data shown here include all hospitals in San Francisco and patients hospitalized in acute care beds at Laguna Honda Hospital and Kentfield Hospital San Francisco. Data will be updated as more current information becomes available and is verified.

COVID-19 Patient Count by Bed Type



Suspected COVID-19 Patient Count by Bed Type



Role of the Task Force members and process overview

Task Force Role

- › Be our thought partner, generate ideas
 - Short, medium, long-term
 - Timely and big picture
- › Vet and provide feedback on ideas and policy proposals
- › Outreach: help us to ensure we are hearing from everyone we need to be hearing from; bring different perspectives to the table and bring the work of the Task Force to the community

Timeline

- › Kick-off meeting – April 24, 3:30-4:30pm
- › Meeting #1 – May 14, 2-3:30pm
- › Meeting #2 – June 11, 2-3:30pm
- › Meeting #3 – July 9, 2-3:30pm
- › Meeting #4 – August 6, 2-3:30pm – draft recommendations
- › Meeting #5 – September 10, 2-3:30pm – final recommendations
- › Meeting #6 – October 8, 2-3:30pm – report

Engagement : Multi-Faceted Effort Ahead

- › Task Force members
 - Task Force meetings
 - Small group meetings; sign-up to come through email
 - **Please sign up for a small group meeting as soon as you are ready**
- › Constituencies of Task Force members
 - **Survey now available:** <https://bit.ly/sfrecoverysurvey>
 - Listening tour
- › Larger public
 - Engagement planning currently underway

Engagement: Initial Task Force Small Groups

- › Collect initial survey results
- › Small groups
 - With 1-2 co-chairs in each meeting
 - With facilitator for each meeting
- › 10 one-hour meetings over the next two weeks (April 30 – May 8)
- › Initial meeting will be a get to know you, to hear from you, to hear what you want to see out of this process

Engagement: What to Expect in Small Groups

- › Potential discussion for first meeting...
 - What are you seeing?
 - Risks and Challenges for Task Force
 - Opportunities for Task Force
 - How could we do this process well?
 - Who is missing?
 - What could go wrong here?
 - If we were really successful, what would that look like?

Policy Development

- › Share ideas
- › Context and projections
- › Research and best practices
 - Strategies
 - Recovery planning
- › Support from City staff and policy experts
- › Provide policy makers with analysis and recommendations

ERTF Organized around 3 Main Policy Areas:

Jobs and Business
Support

Vulnerable
Populations

Economic
Development

- › Intentionally broad, need to be further refined with your input
- › Organizational framework for staff, communications

ERTF Policy Areas

1. Jobs and Business Support

- › How can we ensure existing small and medium sized businesses across San Francisco survive, adapt, and thrive in a post-COVID 19 environment?
- › What do San Franciscans need to (re)enter the workforce?

ERTF Policy Areas

2. Vulnerable Populations

- › How can we ensure our most vulnerable residents' needs are met?
- › How do we make it easier for a growing number of people to access and receive the support they need through recovery?

ERTF Policy Areas

3. Economic Development

- › How can we make it easier to start a new business and rebuild our commercial corridors?
- › How can we promote the growth of our city while protecting existing communities?

Initial review of survey results

Task Force Members Initial Survey

- › 60 responses received as of yesterday evening, thank you!
- › Representatives from all affiliation/sector categories have already responded
- › Project team will read every single response in detail
- › Please still go and complete it if you have not yet

Initial Survey Summary: Health-Minded Recovery

- › Re-open safely and honor public health guidance
- › Provide assistance, PPE, training, testing, protocols
- › Make clear what re-opening looks like, what's needed, what metrics we'll use
- › Create safe work environments, safe commutes
- › Address well-being, repair trauma, build healthy communities and families

Initial Survey Summary: Jobs & Business Support

- › Support businesses that already exist, are on the brink of closure
- › Encourage local spending
- › Connect the vulnerable who can work to jobs to build stability
- › Support workers' child care and health/safety needs
- › Retraining and business model rethinking
- › Pay attention to the needs of businesses and workers, like sole proprietors with no employees and undocumented workers, who are ineligible for most/all stimulus so far

Initial Survey Summary: Vulnerable Populations

- › Ensure marginalized communities can access relief
- › Protect folks from displacement, speculation
- › Address vulnerabilities of those with limited mobility, high risk including persons experiencing homelessness
- › Make it easy to find and understand resources available
- › Keep folks connected and encouraged
- › Sustain non-profits that serve those in need

Initial Survey Summary: Economic Development

- › Reconsider impediments to residential development
- › Ensure equitable banking
- › Prevent evictions
- › Lower barriers to entry and reduce burdens on small business
- › Invest in equitable infrastructure/building/transit for stimulus
- › Build a message that will attract business to San Francisco and encourage local spending – "Make San Francisco the cleanest and safest city in the nation"

Initial Survey Summary: Big Picture

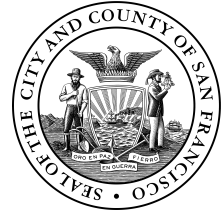
- › We are all in this together
- › Communicate so businesses and residents can plan for the future
- › We need community outreach and community cooperation
- › Make sure whatever is done will actually help the most vulnerable/impacted people/businesses
- › Let's tackle our biggest challenges together
- › Prepare for the long haul

Q&A

<http://onesanfrancisco.org/covid-19-recovery>

email: RecoverySF@sfgov.org

Thank you!



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