

**POLICY GOVERNING ALLOCATION OF SPACE  
IN THE VETERANS BUILDING TO PATRIOTIC ORGANIZATIONS**

The following policy was adopted by the War Memorial Board of Trustees ("WMBT") by Resolution No. 16-21 on May 12, 2016. This policy applies to incoming patriotic organizations seeking to occupy space in the Veterans Building on or after the date of adoption of this policy. It does not apply to organizations occupying the building prior to the adoption of this policy. This policy also does not apply to one-time uses of meeting rooms or special events in the Veterans Building. A separate policy will be developed and adopted by the WMBT concerning one-time uses.

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**I. Eligible Patriotic Organizations:**

The American Legion War Memorial Commission ("ALWMC") may, subject to the terms and conditions of this Policy and the Trust, install the following types of patriotic organizations to occupy rent-free space in the Veterans Building under the San Francisco War Memorial Trust ("the Trust"):

- (a) Veteran-membership organizations composed primarily of (1) U.S. military veterans and/or their relatives, (2) veterans of foreign militaries that were U.S. allies in times of armed conflict and/or their relatives, and (3) those who served honorably in the Merchant Marines during an era of armed conflict and in an area of potential hostilities during that time and/or their relatives.
- (b) Veteran services organizations ("VSOs") such as Swords to Plowshares that both (a) provide social services exclusively or primarily<sup>1</sup> to veterans and/or their relatives, and (b) have their foundation in and are the outcome of a specific war in which the U.S. has engaged.
- (c) Nonprofit organizations dedicated to the commemoration of a war or wars, or veterans of a war or wars, in which the U.S. has engaged.

**NOTE:** It is the WMBT's position that governmental agencies, such as the U. S. Department of Veterans Affairs and the California Employment Development Department, do not constitute "patriotic organizations" within the meaning of the Trust.

**II. Permissible Uses of the Veterans Building:**

(a) Both the Trust and the January 29, 2016 superior court order interpreting the Trust limit patriotic organizations' use of the Veterans Building to use "as club and meeting-rooms and for executive offices and auditorium purposes." Nevertheless, the WMBT will allow patriotic organizations to provide certain types of direct services on-site such as job training, technical training, legal services, housing placement, educational services, peer-to-peer counseling and talk therapies (including such peer-to-peer programs as Alcoholics Anonymous), and referrals to other service providers for such services. Notwithstanding the foregoing, the practice of medicine, the practice of dentistry, and

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<sup>1</sup> In the case of a VSO that provides social services primarily but not exclusively to veterans and/or their relatives, the VSO's activities in the building (both administrative functions and provision of social services) must be exclusively for veterans and/or their families.

substance abuse treatment and referrals requiring on-site physical examinations for such services shall not be allowed on-site, although patriotic organizations that provide such services may locate their executive offices in the building and use their allocated space to perform administrative functions only.

(b) Occupancy of the Veterans Building must conform to any and all applicable federal, state or municipal laws and regulations, including health, police, fire, and zoning regulations.

(c) Under Paragraph 9(n) of the Trust, occupants may not use the Veterans Building (1) "for the purpose of any business, trade or manufacture," or (2) "for lodging or for a hotel or boarding house."

### **III. Veterans Building Space Currently Allocated to San Francisco Posts of the American Legion:**

As of the date of adoption of this policy, the WMBT had allocated to the San Francisco Posts of the American Legion, through the ALWMC, rooms 019, 101, 102, 202, 206, 207, 208, 210, 212, 213, 221, 224, 313, 317 and 319 in the Veterans Building consisting of a total of 22,693 square feet ("Currently Allocated Space").

Incoming patriotic organizations shall initially be assigned space within the Currently Allocated Space. If the WMBT determines that the Currently Allocated Space is fully utilized, through an annual review of space utilization data collected by War Memorial staff, the WMBT will identify additional space in the building for use by patriotic organizations. Alternatively, if the WMBT determines that the Currently Allocated Space is not fully utilized based on the annual review referenced in the foregoing sentence, the WMBT may reduce or revise the Currently Allocated Space in the future. Utilization shall be defined, measured, and tracked according to separate procedures to be adopted by the WMBT in consultation with the Posts.

### **IV. Notice to WMBT of Space Allocation to Patriotic Organizations:**

For each new patriotic organization seeking to occupy space in the Veterans Building, ALWMC shall provide WMBT with the attached **Notice of Space Allocation (Attachment A)** in accordance with the following timelines:

1. For proposed occupancies in the Currently Allocated Space, Notices of Space Allocation may be submitted to the WMBT at any time.
2. If the WMBT determines that the Currently Allocated Space is fully utilized in accordance with the procedures described in Section III, then the ALWMC may submit, no later than January 1st of each year, Notices of Space Allocation for any and all patriotic organizations it seeks to install in space other than the Currently Allocated Space the following calendar year. When feasible, the WMBT will consider requests at any time for space other than the Currently Allocated Space that is not currently assigned or occupied.

ALWMC shall include with the Notice of Space Allocation a letter from the proposed patriotic organization containing all of the following information:

- a. Description of the patriotic organization's purpose, services, and/or activities.
- b. Description of the patriotic organization's proposed use of space in the building.

- c. Number of patriotic organization's employees/volunteers/staff that would occupy the allocated space.
- d. Square footage requested by the patriotic organization.
- e. Confirmation that the patriotic organization is prepared to enter into an occupancy agreement with the City and County of San Francisco ("Occupancy Agreement") which sets forth occupancy terms including, but not limited to: compliance with the covenants and conditions in paragraph 9 of the Trust, prohibition on subletting, indemnification, insurance, building rules and regulations, consequences for violation of rules, and payment of all utilities, services and material of every character used in or about the allocated premises (currently estimated at \$15.42 per square foot per year or \$1.29 per square foot per month), adjusted annually on July 1 as approved by WMBT. The terms of the Occupancy Agreement shall be mutually agreed to by the WMBT and the ALWMC, with approval by both not to be unreasonably withheld.
- f. General description of proposed alterations to the allocated space that the organization proposes to implement in its requested space. NOTE: Any alterations to the building must be approved in writing by both the ALWMC and WMBT, with approval not to be unreasonably withheld, and approved alterations must be paid for in full by the occupant or ALWMC.

**V. WMBT Consideration of Space Allocation:**

- 1. War Memorial staff will review ALWMC's Notice of Space Allocation for completeness. Any questions concerning the proposal shall be sent by War Memorial staff to ALWMC within 15 business days of receiving the Notice.
- 2. Within 60 calendar days of receiving a complete Notice of Space Allocation, including all answers to any questions sent by War Memorial staff, the Veterans Committee of the WMBT shall meet to review the proposed space allocation and make recommendation(s) to the WMBT. If the Committee cannot meet within the aforementioned 60 day period, the full WMBT shall meet instead to consider and take action on the proposal. In reviewing the proposal, the Committee (or the WMBT as appropriate) shall consider the following:
  - a) Does the proposed patriotic organization satisfy the eligibility criteria set forth in Section I of this policy?
  - b) Does the proposed use fall within the uses prescribed in Section II of this policy and/or paragraph 10, (C)(2) of the Trust – *i.e.*, use as club and meeting rooms and for executive offices and auditorium purposes?
  - c) If ALWMC has proposed a particular space to be allocated to the patriotic organization, is that space appropriate based on the patriotic organization's proposed uses or activities, number of staff, and/or proposed alterations, and if not, is there an alternative appropriate space available in the building?
  - d) If the proposal includes alterations, are the alterations appropriate for the space in question? (See Section IV(f) above regarding approval requirements for alterations.)

3. At its next regularly scheduled meeting following the Veterans Committee meeting, or if no such Committee meeting occurs, at the WMBT meeting referenced in (2) above, the WMBT shall consider the proposal and shall approve the space allocation unless it finds that the space allocation does not satisfy one or more of the criteria listed in subsection (2)(a)-(d) above and/or is inconsistent with the terms of the Trust.

**VI. Approved Space Allocations:**

1. The patriotic organization shall execute an Occupancy Agreement with the City and County of San Francisco for no less than 30 days and up to one-year, with automatic annual renewals upon the patriotic organization's written request in accordance with the procedure described in Section 4 below. Upon request, the WMBT shall, when reasonably feasible, consider longer-term occupancies and not unreasonably withhold approval. If the ALWMC and WMBT have approved alterations to the allocated space in connection with the occupancy, the organization shall execute a separate agreement governing such alterations.
2. The patriotic organization shall provide to War Memorial staff the required insurance certificate and additional insured endorsement as required by the City's Risk Manager prior to occupancy.
3. The patriotic organization may commence occupancy following execution of the Occupancy Agreement and submission of required insurance documents.
4. Six months prior to the end of the one-year Occupancy Agreement, the patriotic organization will notify ALWMC and WMBT in writing if it wishes to renew the Occupancy Agreement for an additional one-year term, and ALWMC will provide its renewal recommendation to the WMBT. Within 60 days of receiving ALWMC's renewal recommendation, WMBT shall approve the renewal unless it finds the patriotic organization is not in compliance with the terms of the occupancy agreement. Shorter term occupancies are also subject to an approval process consistent with the terms of the occupancy agreement if requested by occupant prior to the end of the occupancy term.
5. Step #4 shall be repeated on an annual basis.

**Attachments: Attachment A: Notice of Space Allocation**

## Notice of Space Allocation

(Attachment A)

Notice of Space Allocation from American Legion War Memorial Commission to War Memorial Board of Trustees for new patriotic organization seeking to occupy space in the Veterans Building

Note: Complete online, print and submit to War Memorial, Veterans Building Room 110.

### ALWMC AUTHORIZATION:

|  |   |
|--|---|
| Submitted By:<br>Paul Cox                  | ALWMC Position:<br>Chair                  |
| Authorized Signature:<br>[signed Paul Cox] | Date of Notice (m/d/yy):<br>July 24, 2017 |

### PROPOSED PATRIOTIC ORGANIZATION:

|  |  |
|--|--|
| Name of Organization:<br>Swords to Plowshares Veterans Rights Organization   | Organizational Status (e.g., 501(c)(3)):<br>501c3  |
| Description of activities, functions and/or services provided by patriotic organization:<br>STP will use the space to provide Employment, Rapid Rehousing, Case Management and Legal services to veterans. They will also use some of the space for executive, resource development, policy, finance and other supportive functions. |  |
| Authorized Contact Person:<br>John Beem  | Position in Organization:<br>Chief Financial Officer   |
| Address, City, State & Zip Code:<br>1060 Howard, San Francisco, CA 94103   |  |
| Daytime Phone:<br>415-655-7249   | E-mail Address:<br><a href="mailto:jbeem@stp-sf.org">jbeem@stp-sf.org</a>  |
| Type of Organization (check all that apply):   |  |
| <input type="checkbox"/>   | A veteran-membership organization composed primarily of U.S. military veterans and/or their relatives.   |
| <input type="checkbox"/>   | A veteran-membership organization composed primarily of veterans of foreign militaries that were U.S. allies in times of armed conflict and/or their relatives.  |
| <input type="checkbox"/>   | A veteran-membership organization composed primarily of those who served honorably in the Merchant Marines during an era of armed conflict and in an area of potential hostilities during that time and/or their relatives.  |
| <input checked="" type="checkbox"/>  | A veteran services organization ("VSO") such as Swords to Plowshares that both (a) provides social services exclusively or primarily <sup>1</sup> to veterans and/or their relatives, and (b) has its foundation in and is the outcome of a specific war in which the U.S. has engaged.<br><sup>1</sup> In the case of a VSO that provides social services primarily but not exclusively to veterans and/or their relatives, the VSO's activities in the building (both administrative functions and provision of social services) must be exclusively for veterans and/or their families. |
| <input type="checkbox"/>   | A nonprofit organization dedicated to the commemoration of a war or wars, or veterans of a war or wars, in which the U.S. has engaged.   |

### SPACE ALLOCATION:

|  |                                      |
|--|--------------------------------------|
| Proposed Room Number(s): 313A to 313 <sup>F</sup> , 310, Suite 300 per attached drawing. | Approximate Square Feet:<br>9,740 sf |
|--|--------------------------------------|

ALWMC shall include with this Notice of Space Allocation a signed letter from the proposed patriotic organization on the organization's letterhead containing all of the information listed on page 2.

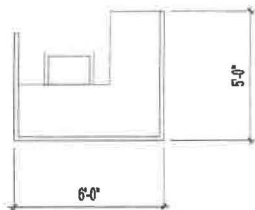
**TO BE FILLED OUT BY WMBT STAFF ONLY:**

|                       |              |
|-----------------------|--------------|
| Date Notice Received: | Received By: |
| Date Notice Complete: | Received By: |

**ALWMC shall include with this Notice of Space Allocation a signed letter from the proposed patriotic organization on the organizations' letterhead containing all of the following information:**

- a. Description of the patriotic organization's purpose, services, and/or activities.
- b. Description of the patriotic organization's proposed use of space in the building.
- c. Number of patriotic organization's employees/volunteers/staff that would occupy the allocated space.
- d. Square footage requested by the patriotic organization.
- e. Confirmation that the patriotic organization is prepared to enter into an occupancy agreement with the City and County of San Francisco ("Occupancy Agreement") which sets forth occupancy terms including, but not limited to: compliance with the covenants and conditions in paragraph 9 of the San Francisco War Memorial Trust, prohibition on subletting, indemnification, insurance, building rules and regulations, consequences for violation of rules, and payment of all utilities, services and material of every character used in or about the allocated premises (currently estimated at \$15.42 per square foot per year or \$1.29 per square foot per month), adjusted annually on July 1 as approved by the War Memorial Board of Trustees.
- f. General description of proposed alterations to the allocated space that the organization proposes to implement in its requested space. NOTE: Any alterations to the building must be approved in writing by both the ALWMC and WMBT, with approval not to be unreasonably withheld, and approved alterations must be paid for in full by the occupant or ALWMC.

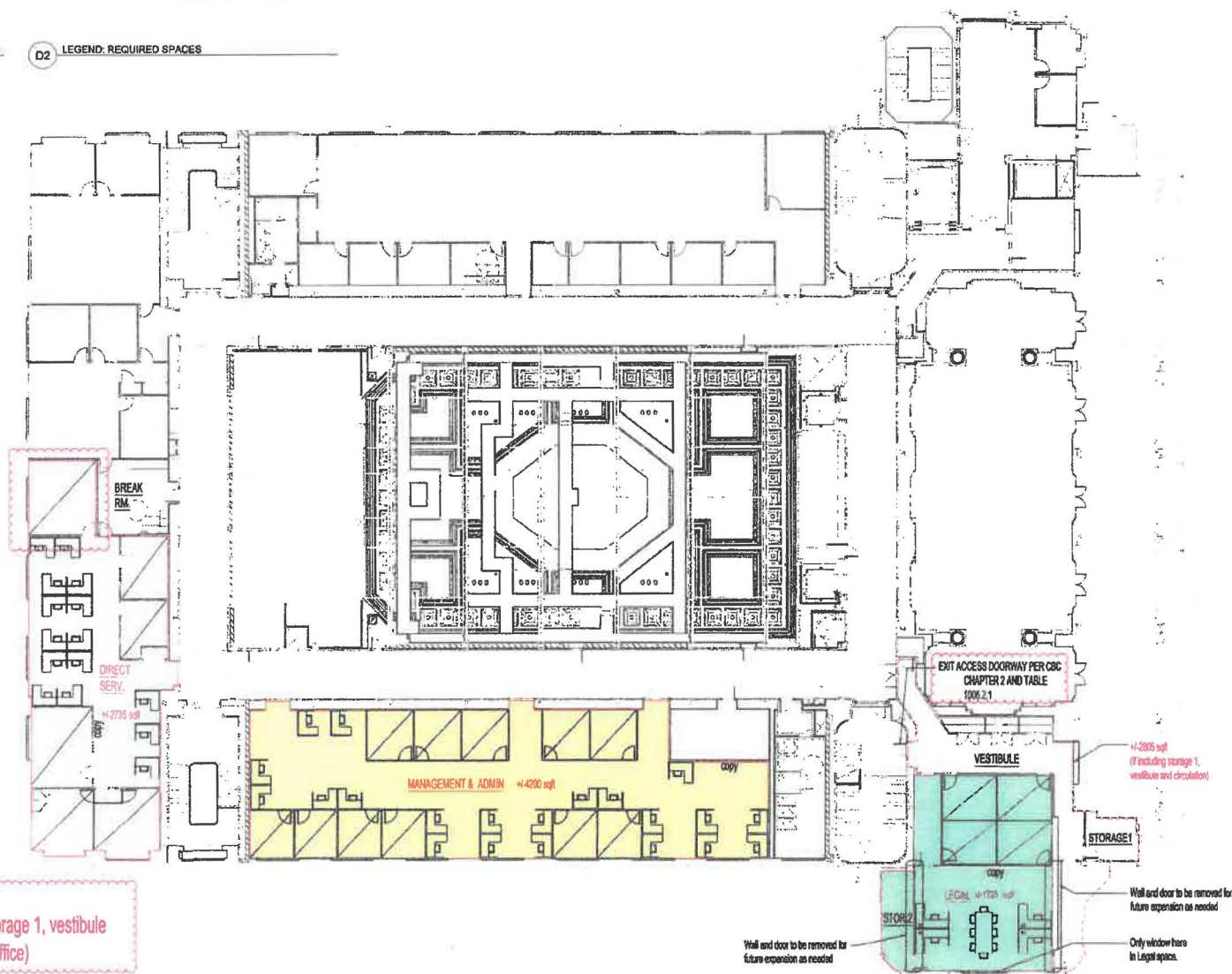




- MANAGEMENT & ADMIN: 11 OFFICES / 21 CUBES
- DIRECT SERVICES: 5 OFFICES / 15 CUBES
- LEGAL SERVICES: 4 OFFICES / 4 CUBES,  
POSSIBLY CONFIGURED WITH  
SHARED PRIVATE SPACE

D1 TYP. MODULE (UNLESS OTHERWISE NOTED)  
6'-0" x 5'-0"

D2 LEGEND: REQUIRED SPACES



**TOTAL:**  
+/-8,655 sqft  
(9,740 sqft if including storage 1, vestibule and circulation at Legal office)

A1 THIRD FLOOR PLAN  
3/32" = 1'-0"

## SWORDS TO PLOWSHARES

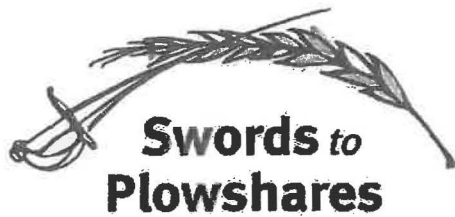
SAN FRANCISCO, CA

**SSDP**

441 Church St., Suite 202  
San Francisco, CA 94103  
T: 415.777.0865  
F: 415.777.0865

OPTION C  
3RD FLOOR ONLY

3/32" = 1'-0"  
1703  
**A2.1c**



VETS HELPING VETS SINCE 1974

Elizabeth Murray, Managing Director  
San Francisco War Memorial and Performing Arts Center  
401 Van Ness Avenue, Suite 110  
San Francisco, CA 94102

July 20, 2017

Dear Ms Murray,

This letter is to inform you that Swords to Plowshares wishes to occupy 8,655 square feet of office space in the War Memorial Building. Please see drawings included with this letter. This space includes rooms 310, a space which we are aware is unfinished. We are prepared to invest the funds necessary to make the space usable, and we understand that these upgrades are subject to approval by WMBT. Swords also intends to remodel other currently finished space - also at our own expense - and similarly subject to approval by WMBT.

Swords to Plowshares is a veteran-serving non-profit that has been working to heal the wounds of war and restore hope and dignity for all veterans in San Francisco since 1974. We provide a broad array of services to veterans including employment, legal assistance, case management, and housing. We also have a policy group that works to improve the lives of veterans on a regional, state and national level.

We would use the space at the War Memorial Building to provide Employment, Case Management and Legal services to veterans. We would also use some of the space for Executive, Resource Development, Policy, Finance and other supportive functions. It is our plan to retain our street presence at 1060 Howard St for drop in services. Our clients at the War Memorial Building would be veterans who had been screened and referred.

We envision approximately 60 employees working in this space, most of them full time. We attach a trial fit of the space. Our operational plans are well-served by a conventional mix of cubicles and private offices. Employee density will be efficient but not overcrowded.



Swords to Plowshares is prepared to enter into an occupancy agreement with the City and County of San Francisco and will comply with covenants and conditions therein. We would be prepared to pay for utilities, services and other operating expenses currently estimated at \$1.29 per square foot per month and subject to annual adjustment.

We believe Swords to Plowshares will bring a level of activity and veteran services that is consonant with the purposes of the Building. With Swords as a tenant, the Building can play an even more important part in our providing critical services to our nation's veterans.

Sincerely,

A handwritten signature in dark ink, appearing to read 'John Beem', with a large, stylized initial 'J'.

John Beem  
Chief Financial Officer  
Swords to Plowshares  
415-655-7249



**American Legion War Memorial Commission**  
**War Memorial Veterans' Building**  
**401 Van Ness Avenue, Room 101**  
**San Francisco, CA 94102**  
**415-861-4920**



July 24, 2017

Mr. Tom Horn, President  
War Memorial Board of Trustees  
401 Van Ness, Suite 110  
San Francisco, CA 94102

Dear President Horn,

At the American Legion War Memorial Commission meeting on September 6, 2016, the Commission voted to install Swords to Plowshares facilities in the Veterans' Building. Following conversations with you and Managing Director Beth Murray, Swords to Plowshares has made some changes and clarifications to their application, including the attached drawing showing the configuration and uses of the spaces they need. The War Memorial Commission concurs with these changes. The revised Notice of Space Allocation, a copy of their revised letter to the Commission, and the drawing are attached for review and action by the Board of Trustees.

In order to provide a significant set of services to veterans in the Veterans Building they will require Suite 313, the unused space along the south side of the third floor (Room 310), and Suite 300 in the southeast corner of the third floor. The total space needed is approximately 9,740 square feet. As noted in their letter to the WMC, Swords to Plowshares is willing to fund the tenant improvements necessary to make those spaces usable. This, of course, will require substantial lead time for coordination, planning, design, permitting, and construction. We would like the Board of Trustees to approve this installation in principle at its August meeting so that the design process can begin immediately pending the Board of Trustees' final approval.

Sincerely,  
American Legion War Memorial Commission

Paul Cox, Chair