



# Jumpstarting ROC Survey Findings

5/20/2020

# High-Level Summary Statistics

- Survey sent directly to hundreds of individual organizations by City staff and indirectly to others via email distribution lists
- As of 5/17, **474 organizations** with at least one location in the Rochester city limits had responded
  - **95%** of these organizations identified as locally-owned / based and not chains or franchises
  - **77%** have staff; the remaining 23% are run solely by the owner or Director
  - **33%** has an owner or chief operator that identifies as African American, Asian, Latinx, or Native American
  - **27%** have a female owner or chief operator

# Summary of Major Findings Based on the Data

- Food and beverage service businesses are looking for **relaxed regulations on outdoor seating** to replace or supplement heavily-spaced indoor seating.
  - Some suggested the use of their own parking lots/spaces for seating.
  - Others suggested temporary street closures in targeted areas during specific hours.
- Many food service businesses are interested in being **connected to additional labor for delivery service**, but they do not want this labor to come from the existing app-based services, and they are cautious about additional insurance costs this might entail.

# Summary of Major Findings Based on the Data

- Most fitness / recreation / arts organizations expressed positive interest in the option of using free **park space for their programming.**
- **Back rent and utilities are a concern for 42%** of those who answered the survey.
  - Some others responded that they are not yet concerned about these expenses but would be if they need to stay closed for several months.
  - Commercial landlords have **mixed reports on payment of rent by their tenants:**
    - 37% reported most tenants have paid in full during the COVID disruption.
    - 31.5% reported that at least 10% but less than half of their tenants had not paid in full.
    - 31.5% reported that 50% or more of their tenants had not paid in full.

# Summary of Major Findings Based on the Data

- **5/6 of the childcare service providers responded that they had capacity to immediately take on new families as customers;** these 5 businesses also said they would be interested in being on a list for businesses to refer their staff to for placement.
  - The remaining provider plans to re-open in June and would have open placements at that time.
- **The majority (67%) of organizations with employees had applied for PPP funds;** only 20% of those without staff had applied or were in the process of applying.
  - Over half of organizations without staff expressed interest in assistance identifying and applying for government grants more broadly; only 30% of orgs with staff expressed this interest.

# Summary of Major Findings Based on the Data

- **Only 31% of organizations with staff completely shut down**; the majority (64%) continued operating with modifications to their operation. Meanwhile, **over half (55%) of solo-operated organizations are completely shut down.**
- Of the organizations that did close their physical operation, **65% of those with staff and 58% of those without staff intend to re-open immediately when permitted.**
  - Those that don't described **concerns about a lack of clear information about the spread of the virus and worries about health and safety of staff and customers.**

# Summary of Major Findings Based on the Data

When asked about their largest needs for assistance in the immediate term to re-open, **organizations with staff** were most interested in:

- **Assurance** from public health officials to the public about how to safely resume normal activities so that customers are comfortable visiting their organization's physical locations (42%)
- **Information** from public health experts about how to safely operate their organization (40%)
- **Free promotion** that/when their business is open (40%)
- **Securing PPE** for staff (37%)

**Immediate needs slightly differed for organizations without staff:**

- **Assurance** from public health officials to the public about how to safely resume normal activities so that customers are comfortable visiting their organization's physical locations (45%)
- **Financial assistance via grants** (44%)
- **Securing PPE** for their own use (38%)
- **Securing PPE** for their customers' use (35%)

# High-Level Recommendations Based on the Findings

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**Explore all reasonable options to allow food-serving establishments to expand their outdoor seating.**

This easing of regulations should consider the NYS Liquor Authority, ADA requirements, and insurance considerations.

Noise may be an issue and should be part of the City's messaging.



**Consider whether the City has capacity to connect individuals looking for food delivery work with restaurants seeking delivery labor.**

Private insurance costs may be a consideration for the implementation of this strategy.



**Investigate the feasibility of coordinating with fitness and arts organizations to use public parks for their programming, which the City would then promote.**

This planning would need to consider participation limits based on the park space and the activity type and how social distancing would be maintained and enforced.



**Reinforce reopening checklists provided by NYS and the CDC that outline specific steps they should undertake to ensure safeguards are in place to protect staff and customers.**

Ideally, organizations should have some way to signal to the public that they have followed these guidelines and that their physical properties are safe to visit

# High-Level Recommendations Based on the Findings



**Identify orgs' operational statuses and any restrictions on patronage at their facilities. Communicate this information via the City website to provide greater clarity to the public on how to safely resume normal commerce.**

This should also specifically highlight childcare services accepting new placements.



**Clearly outline on the City website all the business support resources available from the City, County, State, and federal governments and how to apply for these grants and loans.**

This will require dedicated staff resources to assist businesses in understanding and following through the application processes. Contact information for how to connect with these resources should be on the Jumpstart The ROC website.

Heavily promote Kiva among these options.



**Explore whether the City has capacity to assist organizations with securing Personal Protective Equipment (PPE).**



**Promote the Financial Empowerment Centers as a resource both to business owners and their staff who may benefit from free, 1:1 financial counseling and coaching.**

# High-Level Recommendations Based on the Findings



The City's website and 311 call center should have up-to-date information about how anyone can get a COVID test if they feel sick or have been exposed to the virus.



Have a City response prepared for when eviction moratoriums are lifted.

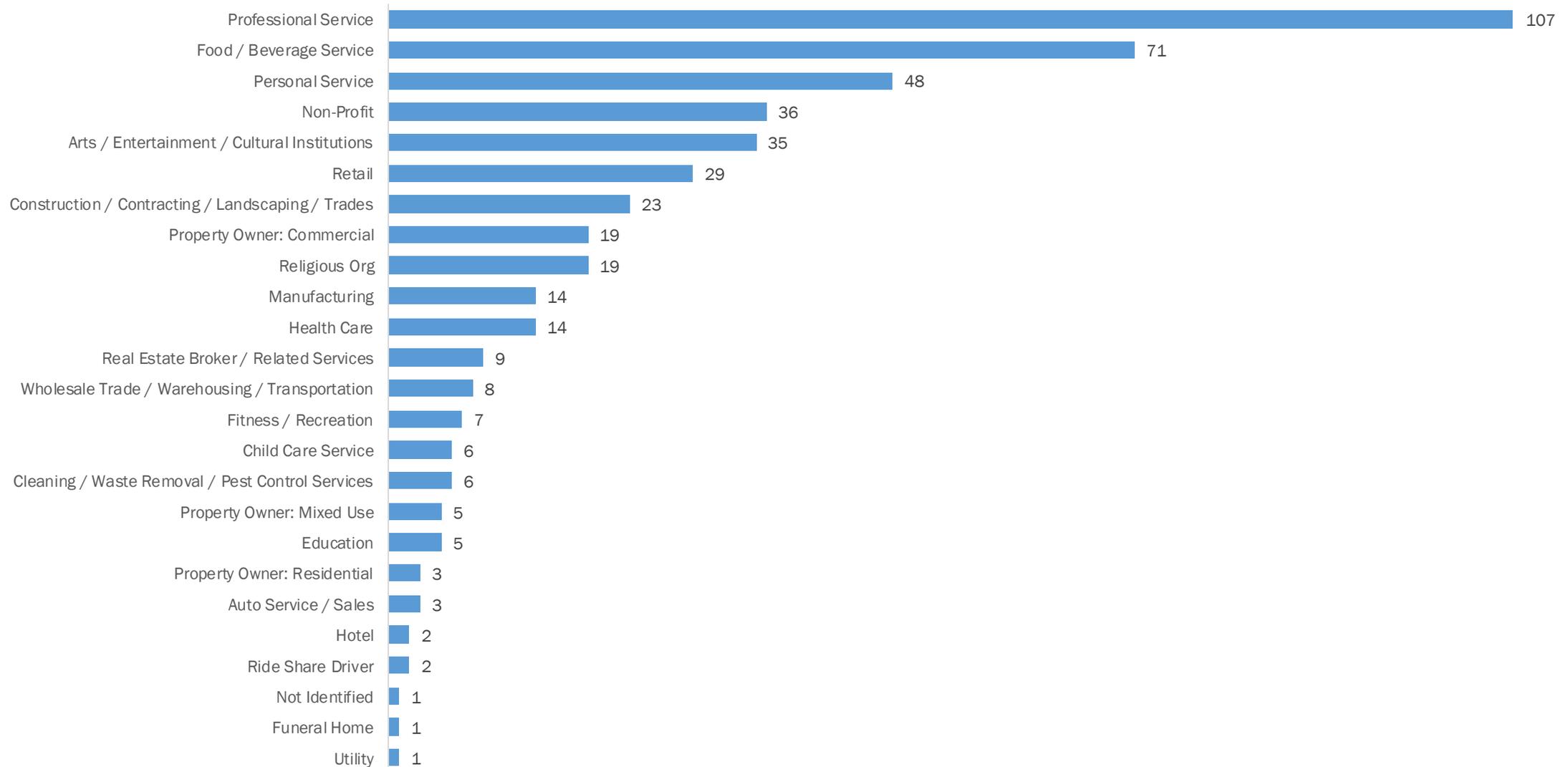


Plan now for how to engage organizations on a periodic basis throughout this recovery with the significant group of organizations that expressed interest in a long-term dialog for collaborative problem-solving.

Nearly 200 organizations are interested in this kind of engagement

# Breakdown of the Data

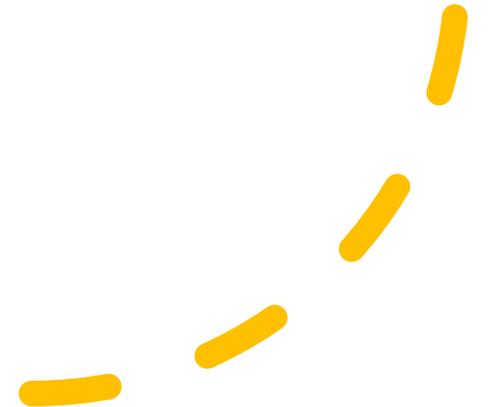
# Breakdown of Organizations by Type



# Details of Food / Beverage Service Organizations

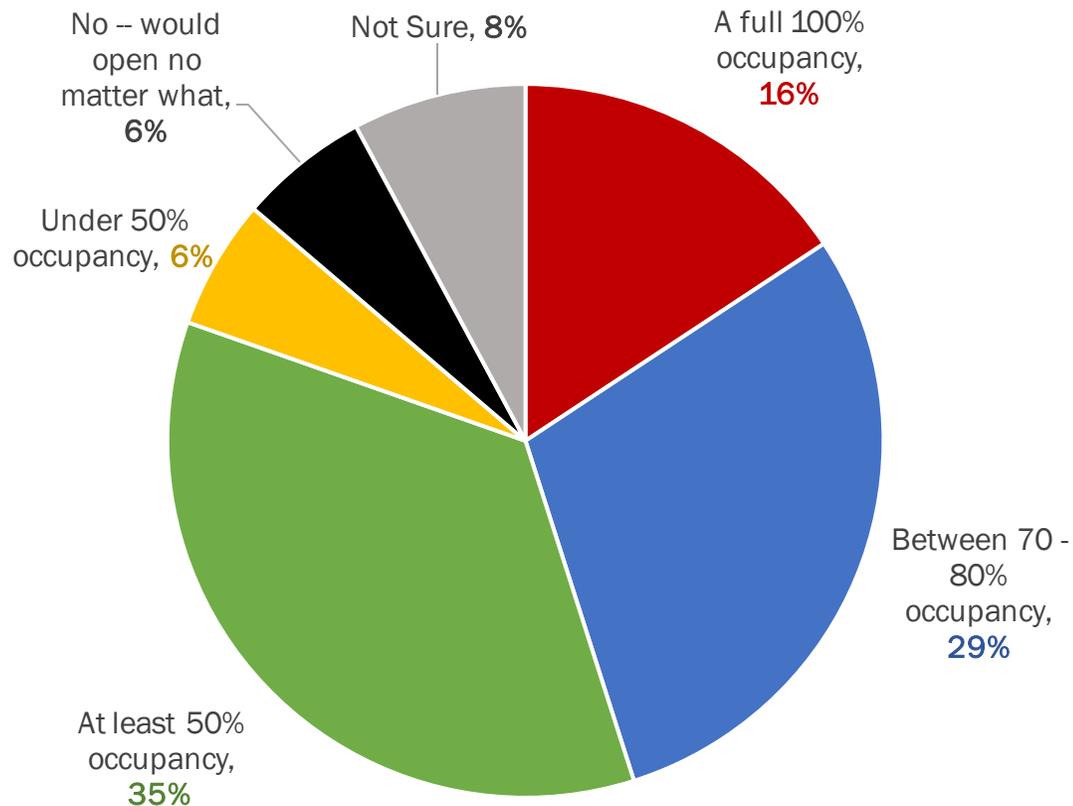
**Of the 71 food and beverage service businesses that took the survey:**

- 78% serve food
- 61% serve alcohol
- 55% have table service
- 27% have a food truck, catering, or other mobile food service offering
- 57% currently have outdoor seating
- 24% currently offer delivery service

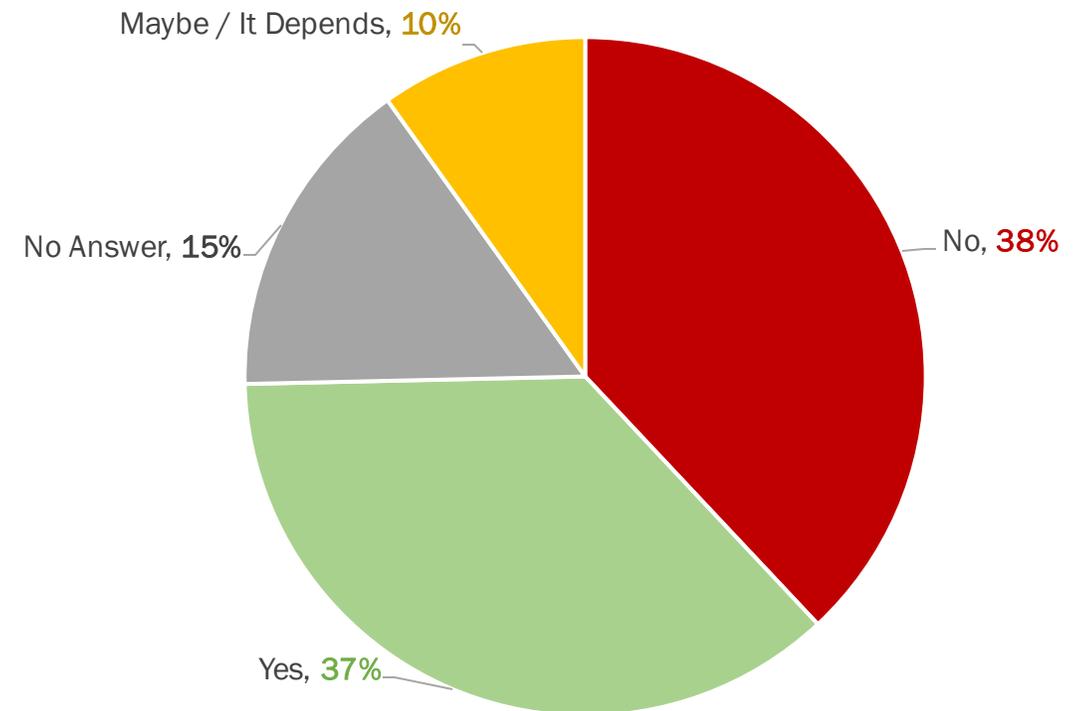


# Responses Specific to Food / Beverage Service Orgs

Is there a **minimum capacity** of seating / customers that your business needs to make opening worth doing?



Do you **need additional delivery labor**?



# Responses Specific to Food / Beverage Service Organization

**We asked if there were specific regulations that, if eased temporarily during this crisis / the recovery period, would greatly help their business.**

- **33 specifically mentioned allowing increased outdoor seating**
  - Others commented on alcohol regulations and signage rules

“Outdoor seating would absolutely help us. It would also create a more relaxed environment. We sit in front of the Inner Loop Fill in where it's fenced off, if that could be opened up that would really be amazing.”

“Outdoor seating would allow for additional sales due to restrictions for social distancing. If partial street closure could happen during certain days/hours, that would benefit all types of businesses for pedestrian walk, shopping and dining.”

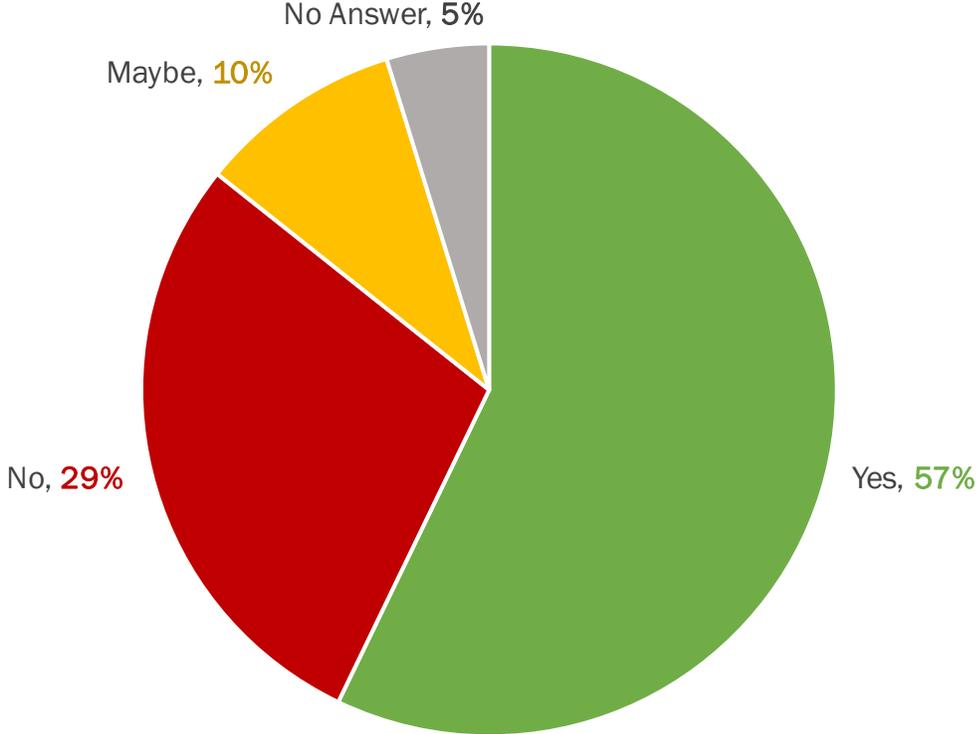
“Outdoor seating would be great. But inside it's hard to maintain distance”

“Outdoor seating, partial street closure or removing one side of the street of parking or something- to further expand outdoor seating and encourage people walking/biking by. I know a lot of people have said they are avoiding walking on busier sidewalks like by us (we're on Park Ave) because there's not enough room to stay 6 feet apart. That could really be so huge for us, and especially once things open up a bit more and we can do outdoor dining but not indoor. I would imagine a lot of other businesses would be into this too -- like, imagine Gibbs street closed and turned into a little plaza where Javas, Max, those places in Max's building, maybe even Temple Bar & Grill or others on East Ave.”

“Outdoor tenting in our parking lot could help, but that involves extending liquor license and possible noise ordinances within the COR.”

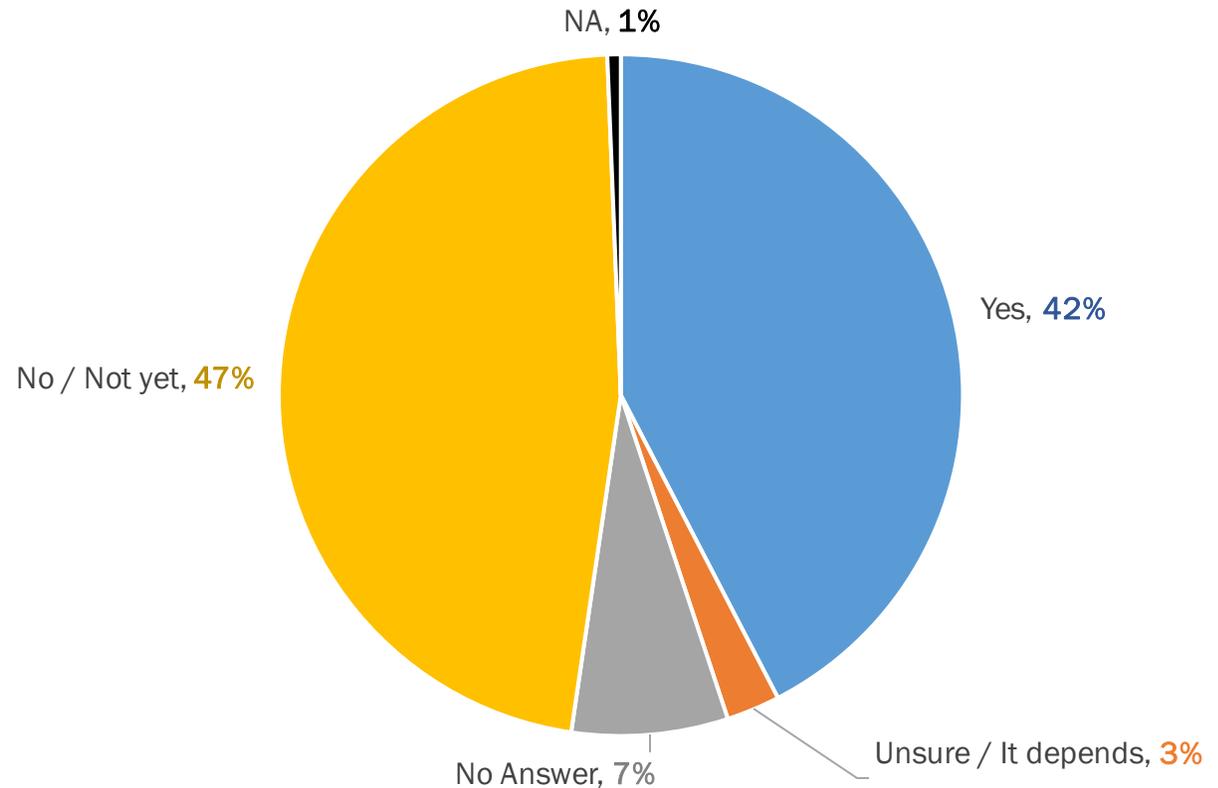
# Question to Fitness / Recreation / Arts Orgs

Would you use free space in a City park to run your programs for your customers / members, if that opportunity was made available and the City partnered with you for promotions and logistics?



**All organizations:**  
"Are you concerned about owing back rent, utilities, or other expenses that will come due when State or other non-enforcement orders expire?"

**42%** are concerned about back expenses in the short-term, but some other organizations said they may have these concerns in the future if this crisis extends longer.

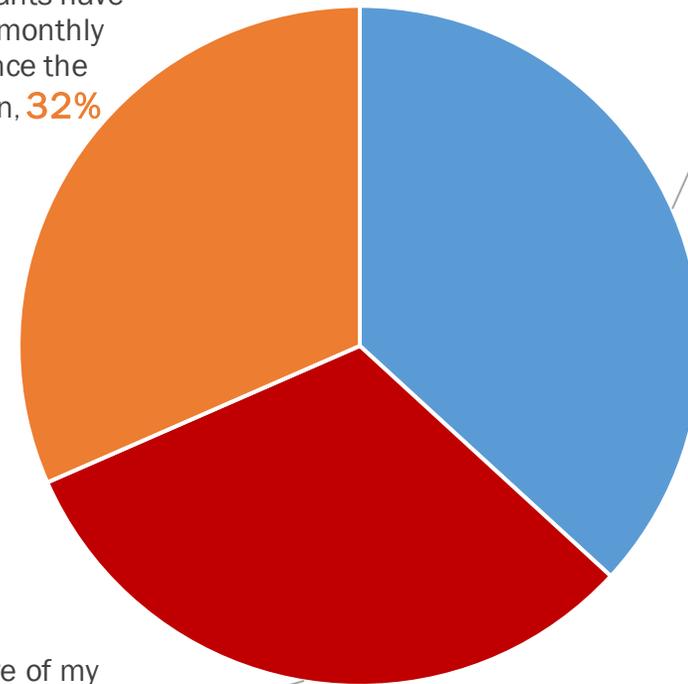


# Question to Commercial Landlords / Property Managers

## Are you facing **challenges with tenants not paying rent?**

Yes - between 10 - 49% of my commercial tenants have not paid their full monthly rent amounts since the COVID crisis began, **32%**

Yes - 50% or more of my commercial tenants have not paid their full monthly rent amounts since the COVID crisis began, **32%**



No - most tenants have paid their rent in full in recent months, **37%**

# Question to Childcare Services

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We asked if childcare providers had the capacity to take on new families as clients.

5/6 of these organization said yes

The remaining provider said they were closed currently but would when they re-open in June



We also asked if they would be interested in being a list for referrals for workers looking for a childcare service.

5/6 said yes

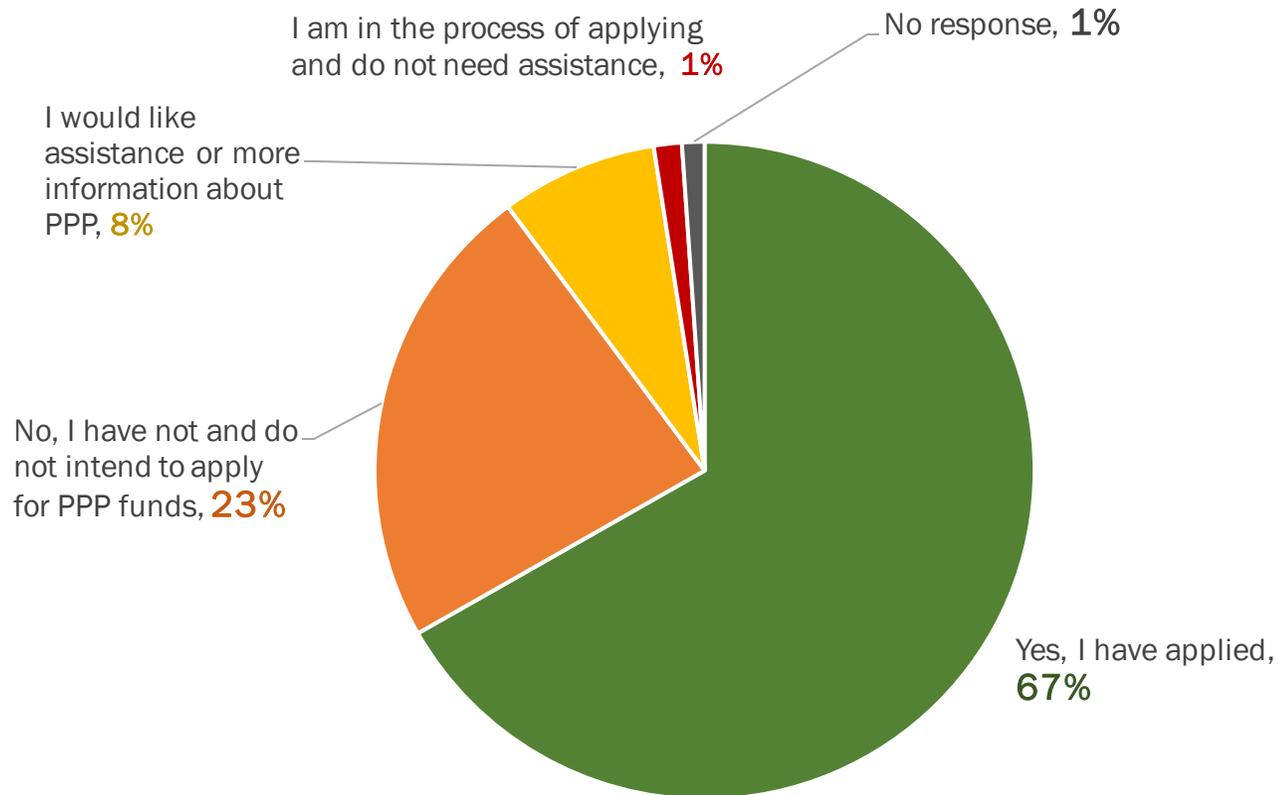


# Responses from organizations **with Staff** (77% of responses)

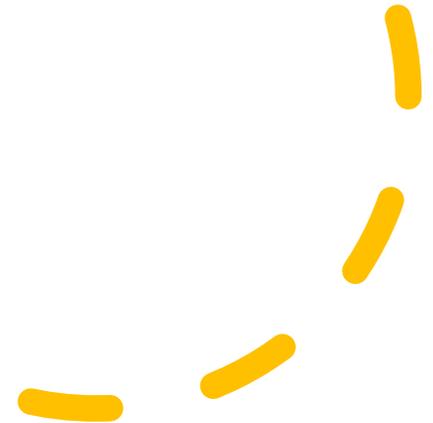
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# Grant Funding

## Have you **applied** for PPP funds?

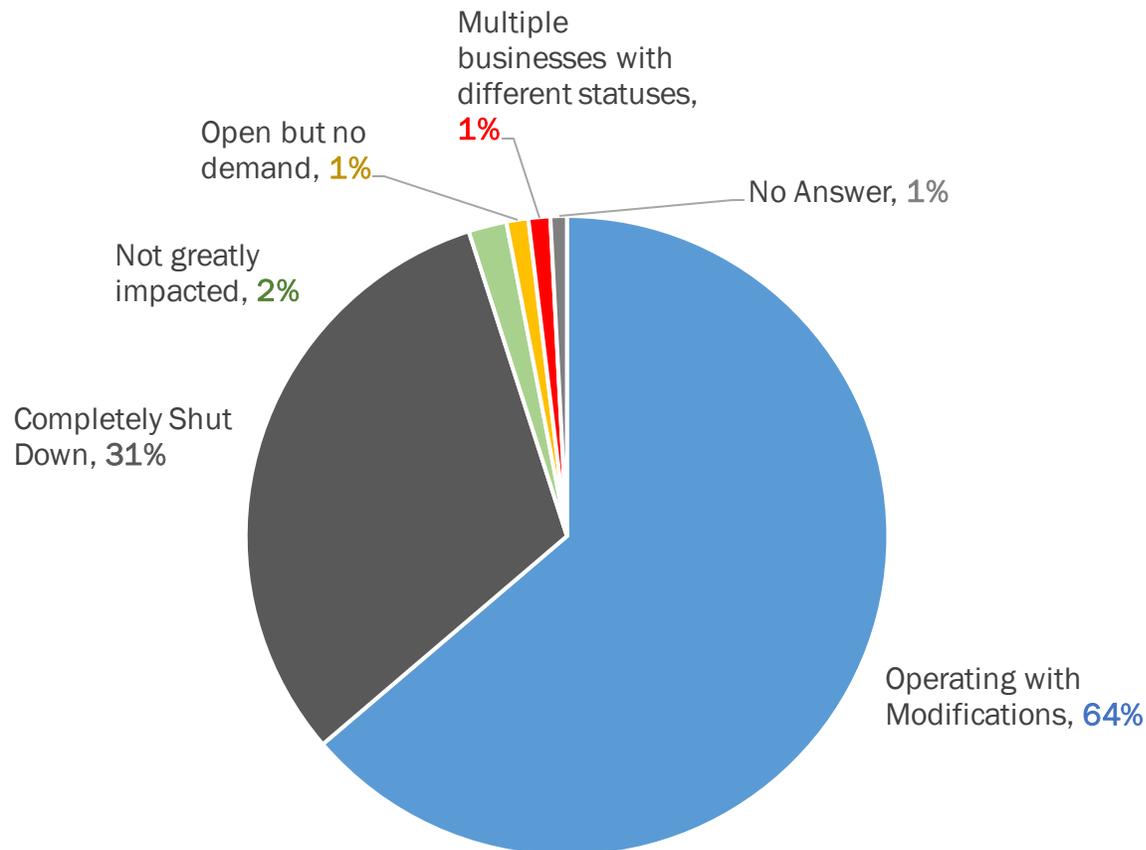


**30%** responded that they are **looking for assistance with identifying and applying for government grants and loans in general.**



# Operation Status

How has your organization's operations been impacted by COVID-19?



What are some **specific modifications** your business made in response to COVID-19?

- **38%** shifted to at least some staff working remotely
- **27%** changed staff schedules to increase social distancing
- **46%** changed their physical location's layout to ensure social distancing
- **14%** added drive-up service
- **9%** added delivery service



# Staffing

Did you **reduce staffing**? *(Could select multiple options)*

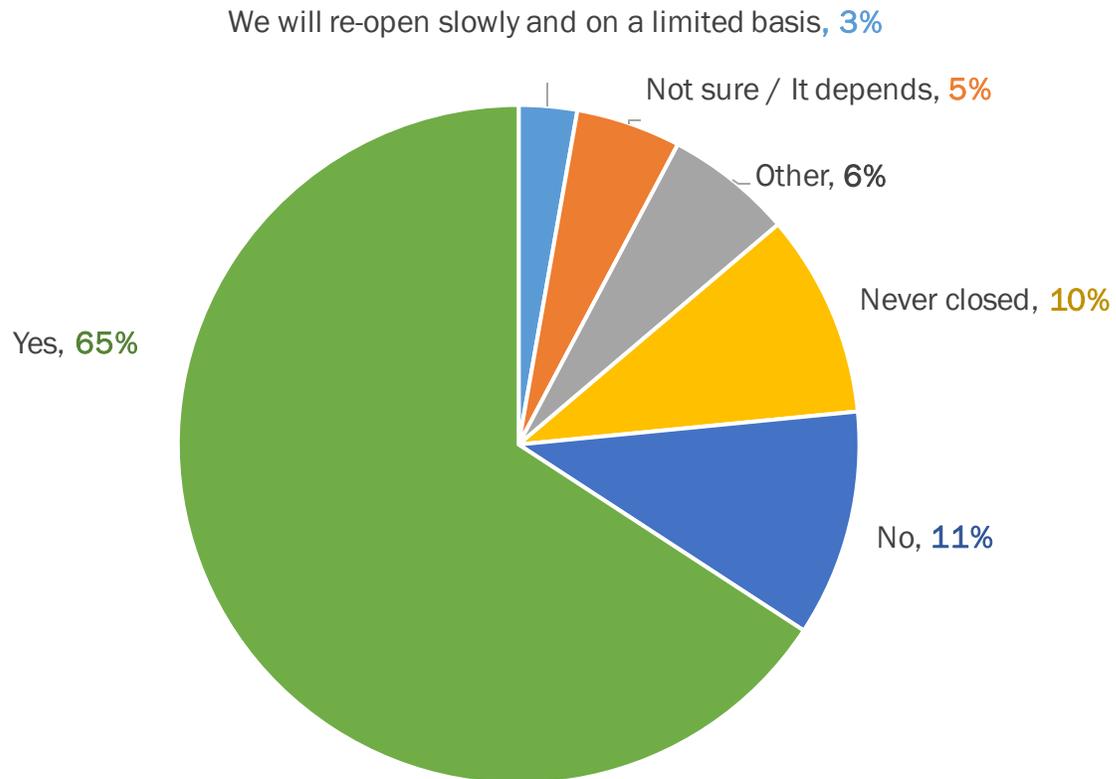
- **38%** shifted at least some staff to **remote work**
- **36%** furloughed staff temporarily
- **21%** laid off staff permanently
- **16%** reduced hours of their staff
- **16%** made no significant changes to staffing

Do you anticipate any of the following **staffing challenges**? *(Could select multiple options)*

- **34%** said **staff are concerned about their health** and may not return until they are confident in their own safety
- **33%** said they anticipated long-term decreases to their business's demand, and **staff may look elsewhere** for jobs with more hours
- **29%** feared that **staff making more on unemployment** would not return when needed
- **24%** had no significant concerns about staffing
- **20%** were unsure whether they would have staffing concerns upon re-opening

# Re-Opening Timeline / Concerns

If your organization were permitted to physically re-open soon with social distancing required, **would you re-open?**



**Most of the specific concerns about re-opening were regarding safety of staff and customers.**

Some businesses also mentioned concerns that in-person demand would not be enough to justify the costs of fully opening in the short-term.

# Specific Needs for Resumption of Operations

**We asked about whether several specific items that may help organizations re-open, and whether the needs are most pressing in the short-, medium-, and long-term horizons.**

For organizations with staff:

- Top short-term concerns (to re-open):
  - 42%: **Assurance** from public health officials about what behaviors are safe to resume so that customers are comfortable visiting the organization
  - 40%: **Information** from public health experts about how to safely operate your business / organization
  - 40%: **Free promotion** to the community about your business / organization being open and safe to visit
  - 37%: Securing PPE for staff
- Top near-term concern (to scale back up to normal):
  - 26%: Financial assistance via **grants**
- Top long-term concern (to withstand another wave of COVID):
  - 25%: Financial assistance via **grants**
  - 25%: Financial assistance via **low-interest loans** or lines of **credit**

# Specific Needs for Resumption of Operations

**We asked about whether several specific items that may help organizations re-open, and whether the needs are most pressing in the short-, medium-, and long-term horizons.**

**For organizations with staff:**

- Financial assistance via grants:
  - Short-term: 27%
  - Near-term: 26%
  - Long-term: 25%
  - Not interested: 22%
- Financial assistance via low-interest loans or lines of credit:
  - Short-term: 14%
  - Near-term: 18%
  - Long-term: 25%
  - Not interested: 43%
- Assistance securing inventory or other necessary supplies to produce goods / services:
  - Short-term: 21%
  - Near-term: 14%
  - Long-term: 11%
  - Not interested: 54%

# Specific Needs for Resumption of Operations

**We asked about whether several specific items that may help organizations re-open, and whether the needs are most pressing in the short-, medium-, and long-term horizons.**

**For organizations with staff:**

- Assistance securing PPE for staff:
  - Short-term: 37%
  - Near-term: 18%
  - Long-term: 12%
  - Not interested: 33%
- Assistance securing PPE for customers:
  - Short-term: 31%
  - Near-term: 16%
  - Long-term: 12%
  - Not interested: 41%
- Relaxed regulations on operations, such as increasing allowed outdoor seating:
  - Short-term: 23%
  - Near-term: 12%
  - Long-term: 10%
  - Not interested: 55%

# Specifically for Orgs with Staff (77% of responses)

**We asked about whether several specific items that may help organizations re-open, and whether the needs are most pressing in the short-, medium-, and long-term horizons.**

## **For organizations with staff:**

- Information from public health experts about how to safely operate your business/organization:
  - Short-term: 40%
  - Near-term: 13%
  - Long-term: 8%
  - Not interested: 39%
- Assurance from public health officials about what behaviors are safe to resume so that customers are comfortable visiting your business/organization:
  - Short-term: 42%
  - Near-term: 16%
  - Long-term: 8%
  - Not interested: 34%
- Free promotion to the community about your business being open and safe to visit:
  - Short-term: 40%
  - Near-term: 14%
  - Long-term: 6%
  - Not interested: 40%
- Assistance finding labor for re-staffing:
  - Short-term: 7%
  - Near-term: 11%
  - Long-term: 15%
  - Not interested: 67%

# Referrals for Staff

**We asked about what kinds of referrals businesses/organizations would like to have available to support their staff:**

- **Financial counseling: 23 responses (6%)**
- **Childcare placement options accepting new families: 10 responses (3%)**
- **Affordable health care / mental health services: 15 responses (4%)**
- **Housing support resources: 16 responses (4%)**

*A few orgs mentioned in the open comment field that they would like to know where to send staff for COVID-19 testing.*



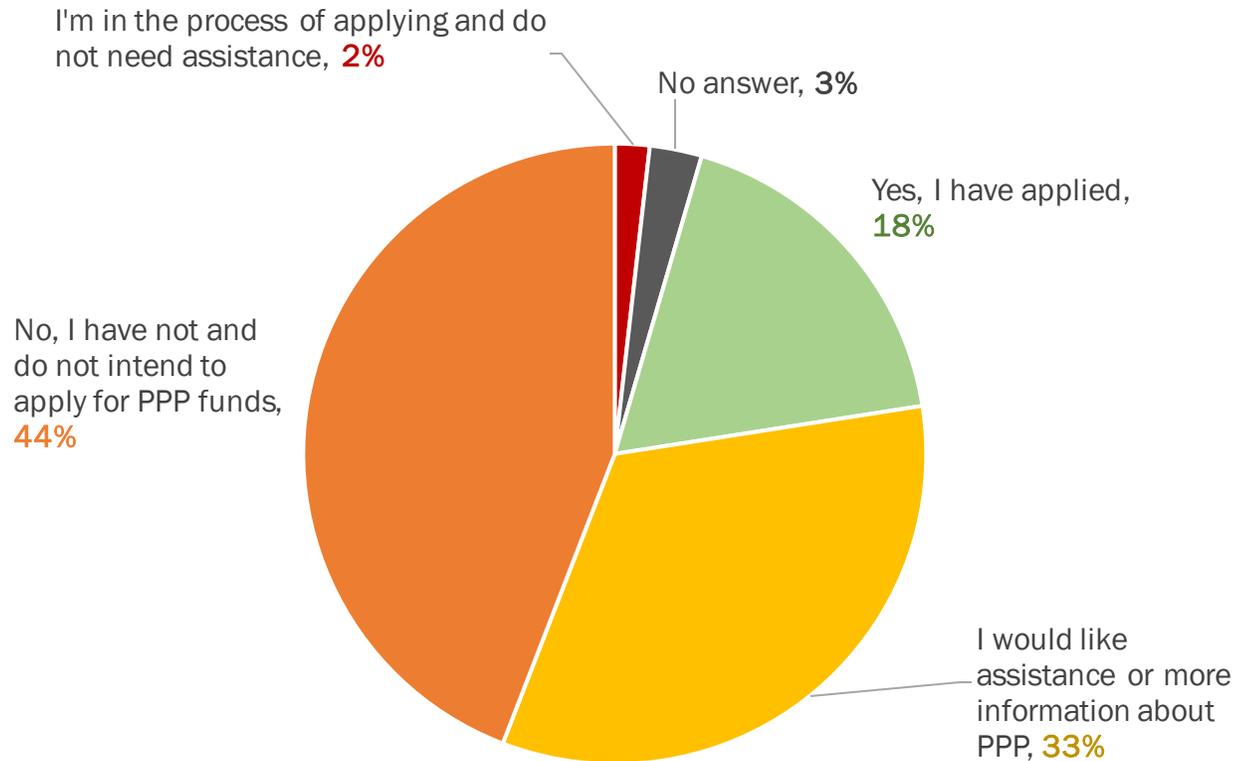


**Responses from  
organizations  
without Staff  
(23% of responses)**

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# Grant Funding

## Orgs Without Staff: Have you applied for PPP funds?

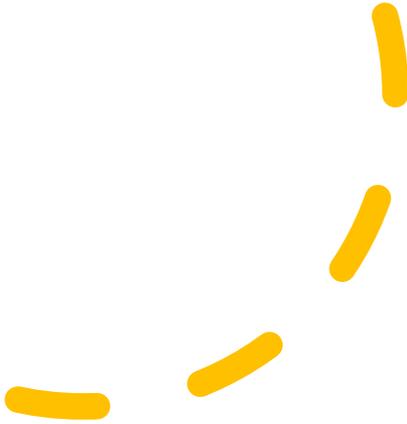
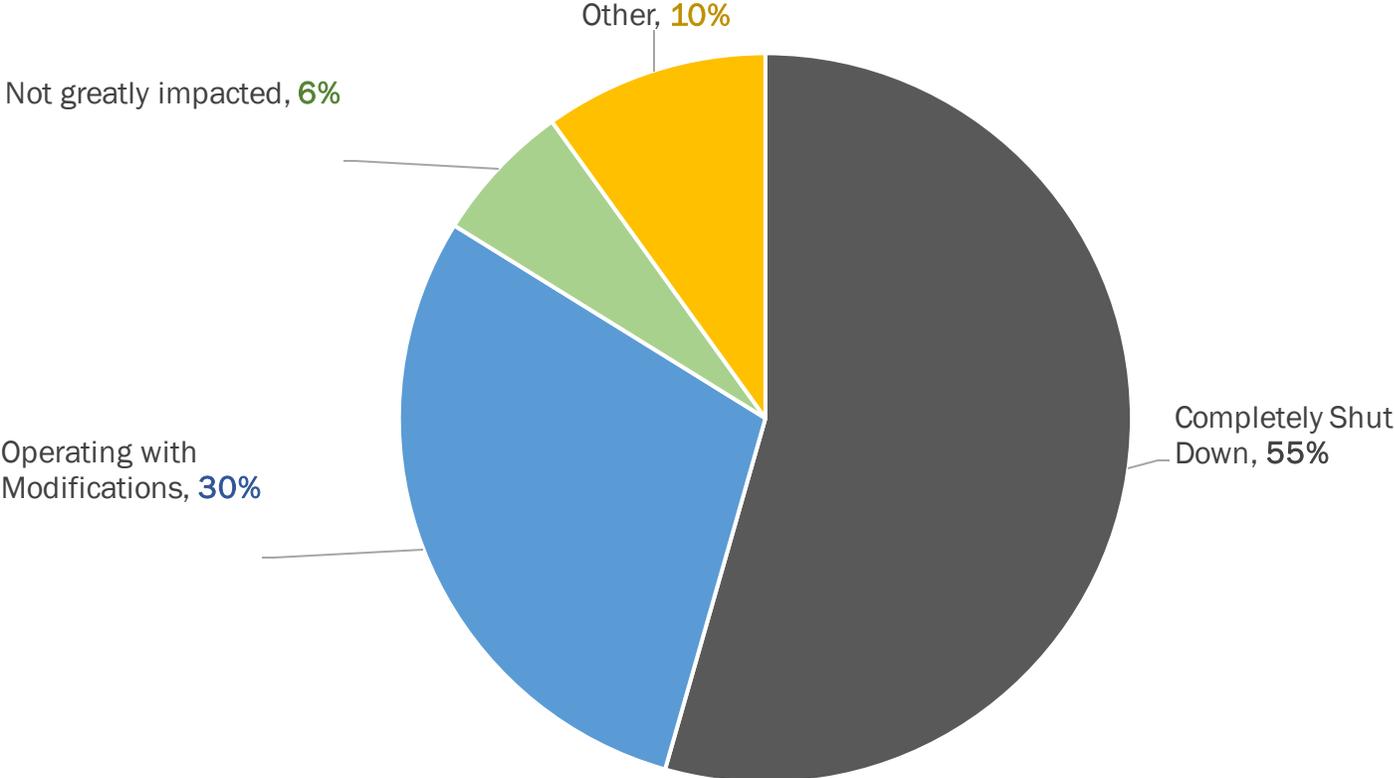


**51%** responded that they are looking for assistance with identifying and applying for government grants and loans in general.



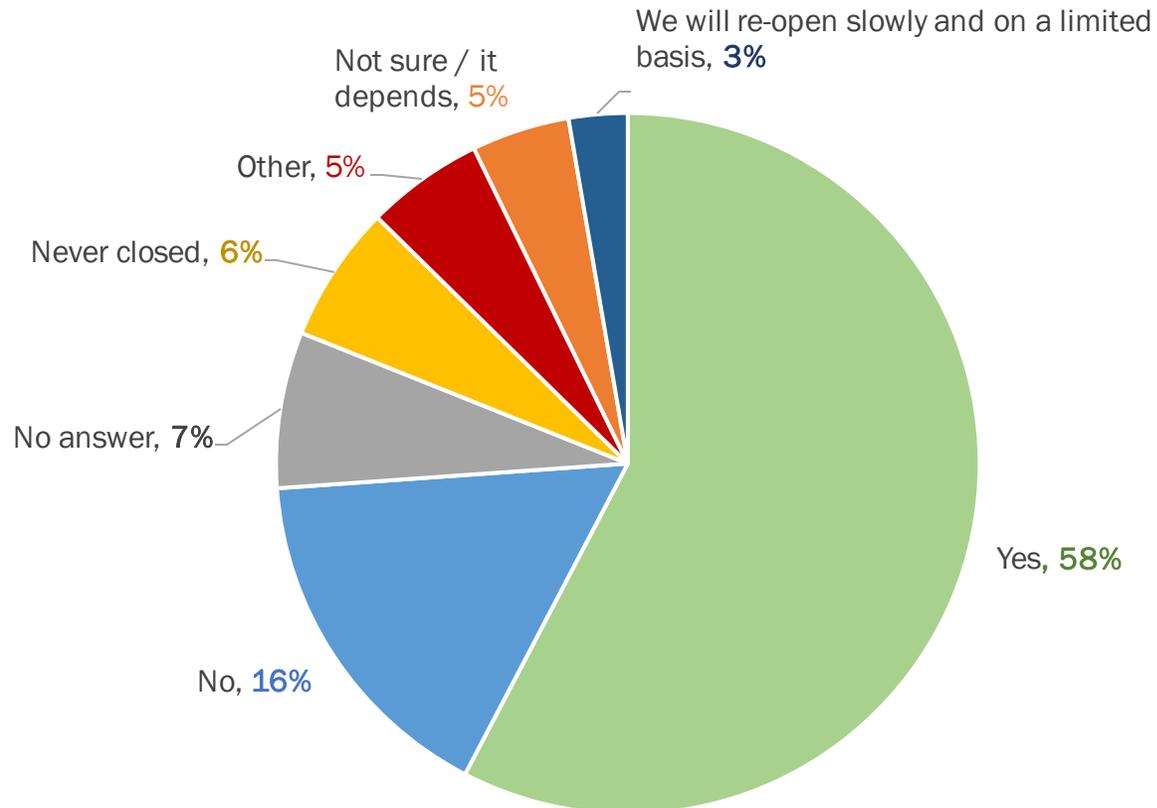
# Operation Status

How has your organization's operations been impacted by COVID-19?



# Re-Opening Timeline / Concerns

If your organization were permitted to physically re-open soon with social distancing required, **would you re-open?**



**Most of the specific concerns about re-opening for orgs without staff centered around a lack of understanding for how the virus spreads and concerns about their own personal health.**



# Specific Needs for Resumption of Operations

**We asked about whether several specific items that may help organizations re-open, and whether the needs are most pressing in the short-, medium-, and long-term horizons.**

**Top needs identified by organizations **without** staff:**

- **Short-term (to re-open):**
  - 45%: Assurance from public health officials about safe behaviors so customers are comfortable visiting the business / organization
  - 44%: Financial assistance via grants
  - 38%: Securing PPE for organization's use
  - 35%: Securing PPE for customers
- **Near-term (to scale back up to normal):**
  - 14%: Financial assistance via grants
- **Long-term concern (to withstand another wave of COVID):**
  - 26%: Financial assistance via low-interest loans or lines of credit

# Specific Needs for Resumption of Operations

**We asked about whether several specific items that may help organizations re-open, and whether the needs are most pressing in the short-, medium-, and long-term horizons.**

For those without staff:

- Financial assistance via grants:
  - Short-term: 44%
  - Near-term: 14%
  - Long-term: 14%
  - Not interested: 28%
- Financial assistance via low-interest loans or lines of credit:
  - Short-term: 24%
  - Near-term: 6%
  - Long-term: 26%
  - Not interested: 43%
- Assistance securing inventory or other necessary supplies to produce goods / services:
  - Short-term: 24%
  - Near-term: 10%
  - Long-term: 15%
  - Not interested: 51%

# Specific Needs for Resumption of Operations

**We asked about whether several specific items that may help organizations re-open, and whether the needs are most pressing in the short-, medium-, and long-term horizons.**

For those without staff:

- Assistance securing PPE for staff:
  - Short-term: 38%
  - Near-term: 11%
  - Long-term: 12%
  - Not interested: 40%
- Assistance securing PPE for customers:
  - Short-term: 35%
  - Near-term: 11%
  - Long-term: 14%
  - Not interested: 40%
- Relaxed regulations on operations, such as increasing allowed outdoor seating:
  - Short-term: 16%
  - Near-term: 10%
  - Long-term: 14%
  - Not interested: 60%

# Specific Needs for Resumption of Operations

**We asked about whether several specific items that may help organizations re-open, and whether the needs are most pressing in the short-, medium-, and long-term horizons.**

For those without staff:

- Information from public health experts about how to safely operate your business/organization:
  - Short-term: 37%
  - Near-term: 12%
  - Long-term: 5%
  - Not interested: 47%
- Assurance from public health officials about what behaviors are safe to resume so that customers are comfortable visiting your business/organization:
  - Short-term: 45%
  - Near-term: 10%
  - Long-term: 6%
  - Not interested: 40%
- Free promotion to the community about your business being open and safe to visit:
  - Short-term: 34%
  - Near-term: 16%
  - Long-term: 5%
  - Not interested: 44%