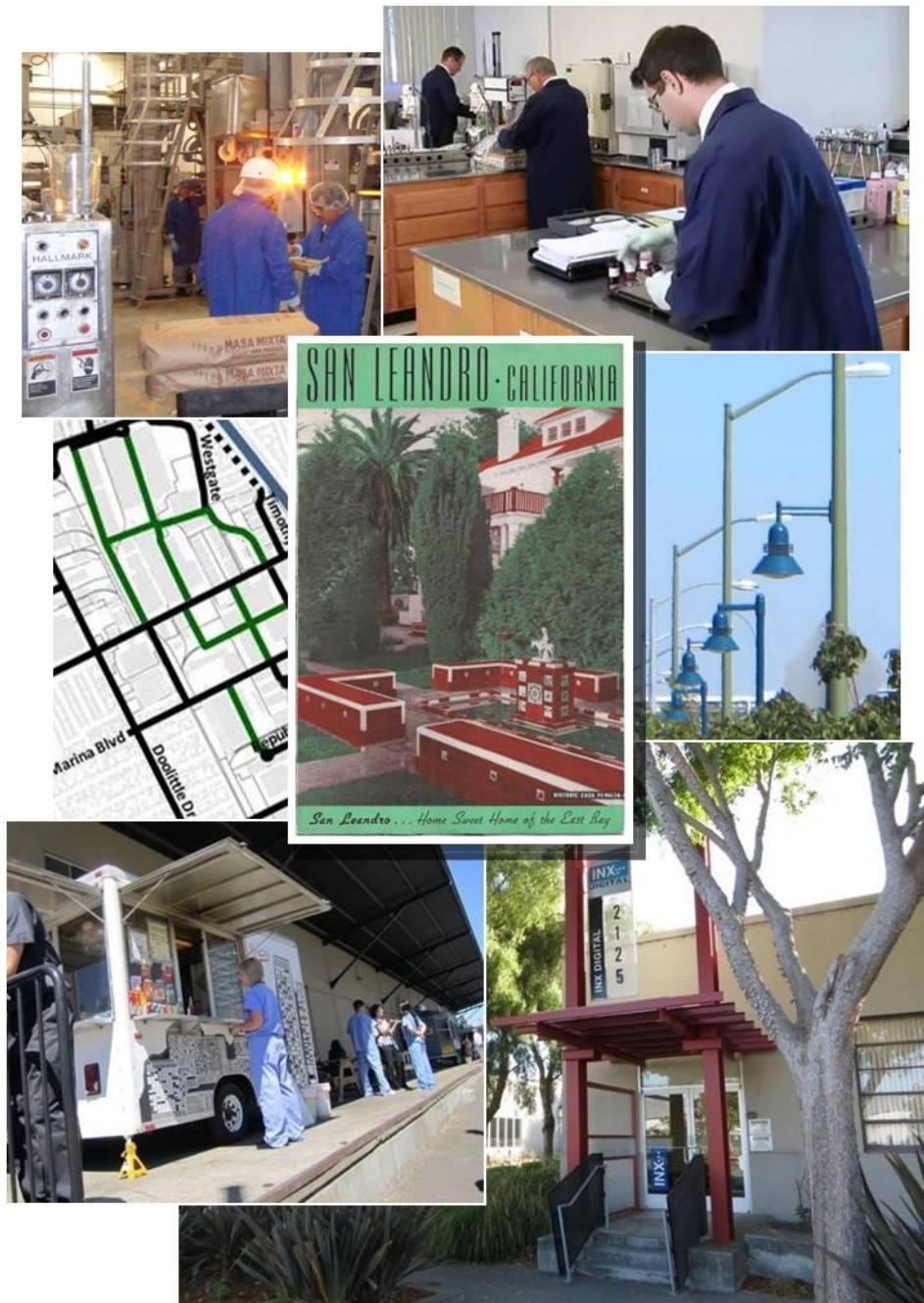


# Next Generation Workplace Districts



**October 2, 2013**

Prepared for the City of San Leandro by  
Gregory Tung, Freedman Tung + Sasaki Urban Design  
Rod Stevens, Spinnaker Strategies

# Contents

<b>3</b>	<b>Preface</b>
<b>3</b>	<b>1. The Context of Change</b>
<b>3</b>	<b>1.1. Work and the Innovation Economy</b>
<b>4</b>	<b>1.2. San Leandro's Industrial Workplace Districts - Yesterday and Today</b>
<b>7</b>	<b>2. A Competitive Analysis</b>
<b>7</b>	<b>2.1. Competitive Strengths of the Districts</b>
<b>10</b>	<b>2.2. Competitive Weaknesses of the Districts</b>
<b>13</b>	<b>2.3. Opportunities for the Districts</b>
<b>14</b>	<b>2.4. Threats from Competing Areas</b>
<b>14</b>	<b>3. The Strategy for Change</b>
<b>14</b>	<b>3.1 Three Primary Strategies</b>
<b>16</b>	<b>3.2 Strategic Themes</b>
<b>17</b>	<b>3.3 Near Term Actions</b>
<b>26</b>	<b>3.4 Longer Term Actions</b>
<b>30</b>	<b>Next Steps - A Call to Action</b>
<b>31</b>	<b>List of Appendices - Figures and Tables</b>

Analysis Maps contained in this report were prepared by Edward Kamp under the direction of the authors, using GIS and other database information provided by the City of San Leandro in July 2013. Some of the building footprint and other information shown may not be up to date as of the time of writing.

# Preface

This study was commissioned by the City of San Leandro in June of 2013. Just months before, the LitSanLeandro fiber optic loop began delivering ultra high speed data to its first set of customers. Now the new billion dollar Kaiser Permanente Hospital complex is rising west of I-880. The question becomes: How can the city capitalize on these developments and put its industrial acreage, comprising a quarter of the total acreage in the city, to greater use and benefit? This strategy provides that direction.

Titled the "Next Generation Workplace Districts," this strategy is based on interviews with area businesses that are already leading on innovation and value creation, extensive on-site fieldwork and research, incorporation of the authors' combined 40+ years of experience in actual place and business revitalizations, and collaborations with City Staff and Chamber of Commerce professionals, whose contributions we gratefully acknowledge.

## **1. The Context of Change**

### **1.1. Work and the Innovation Economy**

The Digital Revolution has transformed all sectors of work. Just as fossil fuels and internal combustion engines in the early 20<sup>th</sup> Century enabled humans to vault past the limits of muscle power<sup>1</sup>, the 21<sup>st</sup> Century "energy source" - computing power coupled with the internet - has fundamentally changed human activity, especially in the workplace<sup>2</sup>. In combination with cultural, political and regulatory changes, digital information has led to unprecedented connectivity across the world, enabling multitudes of highly motivated people and companies in both established and emerging economies to work, collaborate, and compete in the global marketplace.

Manufacturing has been as profoundly affected as office work. Repetitive tasks on the factory floor and in office cubicles alike are now automated or now take place in lower-cost countries. For both the overall prosperity of the population and city reputation, the importance of higher "value-added" work that prioritizes knowledge, skills and innovation has increased<sup>3</sup>. This is especially true for built-out communities that previously had substantial employment and community identity bound up in manufacturing. As the digital revolution has reorganized how work is conducted, spatial organization inside the walls of workplaces has often shifted dramatically. In response to changing workforce size and type, increasingly "horizontal" organizations and collaborative teaming on- and off-site, and digital

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<sup>1</sup> Bernstein, William, The Birth of Plenty: How the Prosperity of the Modern World Was Created. New York: McGraw-Hill, 2004.

<sup>2</sup> Gratton, Lynda, The Shift: The Future of Work is Already Here. London: Collins, 2011.

<sup>3</sup> Karoly, Lynn A and Panis, Constantijn W.A., The 21st Century at Work: Forces Shaping the Future Workforce and Workplace in the United States. Santa Monica: The RAND Corporation, 2004.

communications, records and remote access, businesses have reallocated and restructured their workspaces<sup>4</sup>. However, the *city districts* where work takes place have typically not changed as much in organization and pattern as the buildings and properties themselves, and the practices and mindsets of the real estate industry.

We can summarize several important contrasts between 20<sup>th</sup> Century and 21<sup>st</sup> Century business characteristics that have shaped the evolution of American workplace districts, as follows:

20th Century	21st Century
<ul style="list-style-type: none"><li>• Mass production</li><li>• “Economic Development” – attract big companies</li><li>• Suburban commuting – separated uses linked by highways</li><li>• Sheds for machines</li></ul>	<ul style="list-style-type: none"><li>• Specialty production</li><li>• Grow business ecosystems &amp; supply chains</li><li>• Live-work balance – mixed uses, complete communities</li><li>• Places for people – emphasis on attraction and retention of labor (talent)</li></ul>

## 1.2. The Industrial Workplace Districts - Yesterday and Today

**Baylands Roots:** As an inner-ring suburban city in a region anchored by San Francisco, Oakland and San Jose, San Leandro's workplace districts developed conventionally in 19th and 20th Century formats of downtown, corridor, and industrial zones. Downtown's Plaza at East 14th Street and Washington Avenue was the original small town hub of commerce and civic life. Retailing and other commercial uses later spread along arterial corridors like East 14<sup>th</sup> and Davis Streets as auto ownership grew. What distinguished San Leandro from other small cities was its eventual size and concentration of industrial lands.

Prior to World War II, C.L. Best Tractor Company (later Caterpillar Tractor), Friden Calculating Machine Company and the Hudson Lumber Company were the city's largest industrial firms, located at the edge of a smaller San Leandro. They served their markets locally and regionally by the Central Pacific train line just 6 blocks west from the heart of downtown. A second major rail line, the Southern Pacific, lay over a mile west amid farm fields towards the edge of the Bay. The period from the late 1940s to through the 1960s saw a series of annexations and expansions south and westward of the city limits that grew to encompass thousands of acres of "baylands" - flat, formerly unincorporated county lands extending from the city's original western limits to the tidal edge of San Francisco Bay. As with many communities ringing the Bay, these flatlands became a patchwork of vacant land, modest residential neighborhoods and industrial areas. As individual annexations, they came with their platting and infrastructure as laid out by their original developers – not necessarily in line with a well-planned and comprehensive pattern in mind. The introduction of the Eastshore Freeway (later I-880) in the early

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<sup>4</sup> Lehrer, Jonah, Imagine: How Creativity Works. Boston: Houghton Mifflin Harcourt Publishing, 2012.



1950s served to emphasize a divide between the more established parts of the city and these industrially-dominated flatlands areas to the west (Fig. 5).

**The Past Equation:** For San Leandro, these annexations were linked to industry, taxation and revenue issues. In the postwar period, national corporations such as Chevrolet, Chrysler, Dodge, and General Foods opened West Coast branch plants in San Leandro and its immediate surroundings. In 1947 the City Council agreed to provide full municipal services to Chrysler Motor Parts, though its plant was located outside the city limits and paid no taxes. Within two years, taxpayer opposition overturned the political leadership that had made this deal. The new Council lost no time in annexing the Chrysler plant site and its surrounding area into the city. But in the following two decades property taxes were kept low to continue to attract and retain industry and investment in the city and tax rates were decreased as well, almost annually. Even with low rates, industrial expansion led to industry funding over a third of the cost of city government by the early 1960's<sup>5</sup>. San Leandro's fiscal and community-building success led to the Wall Street Journal's praise of the city as a "model municipality" in a 1966 profile<sup>6</sup>, while it turned a blind eye to the racial exclusion of the period.

**The Prosperity Machine:** During these golden decades, San Leandro's industrial districts were its engine of prosperity. At its peak, over 20,000 people worked in San Leandro's manufacturing sector<sup>7</sup>. During this time, the city had "both a white-collar, foreman/managerial, and small business middle class...as well as a working class of skilled tradespeople, clerical workers, and factory employees and their families<sup>8</sup> ..." living in neighborhoods throughout the city and making their living from working in and supplying the industrial economy. The industrial districts were centers of 20<sup>th</sup> Century manufacturing. Hundreds of firms of all sizes took root here and the vast majority made things (Figs. 3 & 4). Railroads had shaped much of the district (Fig. 2), as the original development pattern of large factory blocks and few streets prioritized rail access and then truck access later as the freeway network grew – a machine-driven layout (Fig. 13).

**Economic Shift:** By the mid-1970's, San Leandro's era of expansion slowed. Vacant lands filled up and American manufacturing began its shift to lower-cost areas elsewhere in the country and abroad. The generation-long "de-industrialization" and the loss of many of the district's large manufacturing companies that followed traumatized San Leandro as much as it did large Eastern and Midwestern manufacturing cities. As with other nearby communities, the city's economy became more regionally oriented. But through that period, San Leandro did not grown a large office employment segment – it had neither developed a large Central Business District (CBD) of office buildings in downtown, nor the large suburban office parks of newer, more outlying suburbs like Walnut Creek. The first and only significant "Class A" office development in the city, Creekside Plaza, opened near the San Leandro BART

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<sup>5</sup> Self, Robert O., American Babylon: Race and the Struggle for Postwar Oakland. Princeton: Princeton University Press, 2003, pp. 96-111.

<sup>6</sup> Phelps, Lew, "Model Municipality – San Leandro, Calif., Manages to Surmount Many of the Problems That Plague Cities." The Wall Street Journal. New York: Dow Jones & Co., Inc., March 4, 1966, p. 10.

<sup>7</sup> Self, Robert O., op cit; figure based on 1960 manufacturing statistics cited therein, plus additional growth estimated through the 1970's.

<sup>8</sup> Self, Robert O., op cit, pp. 105-6

station in 2002, with home-grown TriNet as its anchor tenant<sup>9</sup>. Plans for a compact office park-styled, transit-oriented Tech Campus located next to the San Leandro BART Station are currently in process, but no similar concentrated office development has occurred west of I-880, due in part to zoning restrictions that preserved industrial-zoned land.

**Why Fix It:** Today, San Leandro's industrial areas and the related commercial uses within them comprise almost one-quarter of the city's land area – around 2,000 acres<sup>10</sup> (Fig. 1). They provide approximately two-thirds of jobs within the city. For over 200,000 I-880 drivers daily<sup>11</sup>, the industrial areas act as the front door to the city, with the Davis Street and Marina Boulevard interchanges serving as two out of the City's three I-880 exits. The districts remain an important source of tax revenue and it's the warehouse vacancy rate in the second quarter of 2013 was just 4.6%, while manufacturing space vacancy stands at 5.3%<sup>12</sup> (Table 1), so a natural question comes up - "if ain't broke, why fix it?"

This is why: because, economically, the city can get far, far more benefit from it in terms of pride, jobs and economic prosperity. Today many of the former factory buildings are simply used for storing and moving goods, not making them (Figs. 19 & 20). 63% of the built industrial space in the districts is used for warehousing and distribution<sup>13</sup>. These uses have low employment per square foot relative to other workplace uses. The wages associated with this are lower than manufacturing, for which employment has now dropped to about 6,800 jobs<sup>14</sup> (Table 2).

With the districts' mass production origins and the low-cost orientation of both municipality and industry, these areas were and are not good "people places," and are neither memorable nor particularly pleasant to get around (Fig. 21). They remain physically and psychologically apart from the rest of the city. Biotech and software companies are not likely to spill over soon into San Leandro's industrial areas – the proximate business ecosystem and talent-attractor features are not present.

**A Fourth of the City's Land:** In the long term, using a quarter of the city's area in a built-out, inner ring Bay area community to primarily meet the warehouse and distribution needs of the region does not help to create wealth for San Leandro itself. Because of the industrial areas' I-880 location and proximity to Oakland's Airport and container port, "goods movement" uses remain regionally important and should continue to be supported, but it is possible for even a moderated shift in the balance of workplace uses in the district toward accommodating higher value-creating businesses. This will increase higher wage employment opportunities and strengthen the image of the city. Increasing the

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<sup>9</sup> Thomas, Susan, "In Depth: Alameda County Growth Profile – San Leandro reworks the past," East Bay Business Journal. <http://www.bizjournals.com/eastbay/stories/2003/08/25/focus1.html> American City Business Journals, August 25, 2003.

<sup>10</sup> San Leandro General Plan. City of San Leandro: 2011 update, Chapter 3, page 12, Table 3-1

<sup>11</sup> WMH Corporation. Lane, Ramp and Full Freeway Closure Analysis - 1-880 Southbound HOV Lane Project (Marina to Davis). November 2011, p. 2.

<sup>12</sup> CBRE "Oakland/East Bay, Industrial - Statistics & Transactions Q2 2013" - Industrial Insert.

<sup>13</sup> Ibid. San Leandro warehouse square footage is indicated as 13,963,580 out of a total industrial inventory of 22,132,354.

<sup>14</sup> City of San Leandro business license data.

number of better-paid workers and entrepreneurs employed in value-adding businesses is essential to enhancing the “multiplier effect” on local household income<sup>15</sup>. But making this change will require active intervention - not just regulation, but active investment and promotion by the community itself.

## **2. A Competitive Analysis**

Determining potential advantageous change directions requires an understanding of the industrial districts’ competitive position relative to other areas’ workplace districts. Our approach to this was to analyze a “S.W.O.T.” inventory, consisting of Strengths, Weaknesses, Opportunities and Threats.

### **2.1. Competitive Strengths of the districts include:**

#### **2.1.1. *Proximity to Oakland Airport, I-880 and the Bay Bridge, and the Port of Oakland.***

Proximity to major transportation hubs and links is of high importance for clients, partners, employees, suppliers, and shippers of district businesses. In addition, there are also Caltrans upgrades under way to both the Davis Street and Marina Boulevard I-880 freeway interchanges as well as adjacent HOV lanes along I-880, ensuring that those key pieces of roadway infrastructure will be built to the latest safety standards and of fresh and new appearance. From a warehousing and distribution perspective, freight proximity to the airport and port facilities is also excellent, as well as existing freight rail lines. It should be noted, however, that air freight volume has dropped 28.5% the last 12 years<sup>16</sup> and that there appears to be little value added to much of the air cargo passing through local warehousing and distribution properties.

#### **2.1.2. *Ease of business.***

When it comes to permitting, San Francisco, Oakland, and Berkeley all have a reputation for bureaucratic delay. The City of San Leandro has a longstanding reputation and reality of being highly responsive and friendly to business, as well as having an equally consistent history of low tax rates. However, it should be noted that once firms’ have completed their permitting and development, their on-going contact with regulators is relatively limited, so for established firms this regulatory advantage is of little importance in their day-to-day operations.

#### **2.1.3. *The LitSanLeandro fiber optic loop.***

The City and its LitSanLeandro partnership have received awards and national press attention (including the Wall Street Journal<sup>17</sup>) for the 2012 inauguration of the city’s gigabit ultra-high speed fiber optic loop.

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<sup>15</sup> See Moretti, Enrico, *The New Geography of Jobs*. New York: Houghton Mifflin Harcourt, 2012.

<sup>16</sup> "Air Cargo Volume Chart," Port of Oakland Air Cargo Marketing Department,  
[http://www.flyoakland.com/cargo\\_volume\\_chart.shtml](http://www.flyoakland.com/cargo_volume_chart.shtml)

<sup>17</sup> Smith, Rebecca, “In San Leandro, a Drive to Get Wired,” The Wall Street Journal.  
<http://online.wsj.com/article/SB10001424052702304450004577277461512790488.html> New York: Dow Jones & Co., Inc., March 14, 2012.

Its immediate availability to businesses along segments of the Davis Street, Doolittle Drive, Williams Street, Merced Street, and Wicks Boulevard corridors within the district is an advantage when other communities are still simply talking and planning for this kind of improvement. At the time of writing, at least 46 business properties (a number of them multi-tenant) city-wide are already connected and using it. Proposed future expansions include a northern extension along Doolittle Drive to Adams Avenue and the Whitney/Edison/McCormick Street loop, and a southwest expansion along Doolittle Drive to loop along Marina Blvd, Monarch Bay Drive, Fairway Drive, Catalina Street, and Burroughs Avenue, Griffith Street and Farallon Drive back to Wicks Boulevard. The connection cost for a first-time conduit link from a property to the loop where none previously exists appears to vary, depending on individual site conditions.

Nearby East Bay cities such as Emeryville already have equivalent speed fiber optic service available to businesses there, as does Santa Clara in the Silicon Valley. San Leandro's window of market uniqueness is limited, however, as the LitSanLeandro "brand" is reportedly slated to become the less place-focused "LSL" as it expands to include neighboring cities. Within the next 3 to 5 years, Hayward, Oakland, Castro Valley and other East Bay cities may sign on with LSL or soon install and offer their own similar fiber optic service<sup>18</sup>.

#### ***2.1.4. Three clusters of high-value-added businesses and their skills base that have grown from San Leandro's industrial history and experience.***

This is perhaps the most important and most overlooked aspect of the districts' strengths, as it is specific and rooted in the place. In reviewing the inventory of district businesses and their profiles, and recalling San Leandro's industrial heritage of the Best Manufacturing Company (Fig. 2), the Friden Calculating Machine Company, the Dodge Plant (Fig. 3), and the Kellogg Plant (Fig. 20), three recognizable and distinctive clusters of business/industry sector types emerge (Figs. 24 & 25). They arise from decades of experience of the firms themselves and the "practice capital" amassed from their parent and predecessor companies and divisions. A number of them exemplify increases in value-added activity in shifting from commodity production to more niche-type manufacturing and an increased focus on research and development. They also represent embedded workforce knowledge and skills in the community – many which are not readily obtainable from high school through university-level schooling. Furthermore, a significant proportion of employment in these firms requires technical training but not necessarily a university degree<sup>19</sup>. They are companies that exemplify organization, innovation, survival, and success:

- **Food processing** – including companies that have created nationally and internationally recognized brands such as *The Ghirardelli Chocolate Company* and *Otis Spunkmeyer*, and regional and local firms, of which many have a craft or locavore orientation such as *Aidells*

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<sup>18</sup> Parr, Rebecca, "Hayward could get high-speed fiber-optic network," *The Daily Review*.

[http://www.insidebayarea.com/daily-review/ci\\_23755197](http://www.insidebayarea.com/daily-review/ci_23755197) Denver: MediaNews Group, July 30, 2013.

<sup>19</sup> Krieger, Lisa M., "'Hidden' economy in Silicon Valley built without advanced degrees," *The San Jose Mercury News*. [http://www.mercurynews.com/science/ci\\_23424656/hidden-economy-silicon-valley-built-without-advanced-degrees](http://www.mercurynews.com/science/ci_23424656/hidden-economy-silicon-valley-built-without-advanced-degrees) San Jose: San Jose Mercury News, June 10, 2013.

*Sausage Company, Saag's Specialty Meats, Mi Rancho Tortilla Factory (Fig.24), Peter James Coffee Limited, Pavel's Yogurt Co., and Drake's Brewing Company.* Companies such as *San Francisco Foods, Bay Cities Produce Co., and Will's Fresh Foods* are also regional suppliers and distributors of produce and other specialties to restaurants, institutions, and stores.

- **Metals & Machining** – including firms such as *PCC Structural Inc.*, (Fig. 24) a superalloy, aluminum and titanium investment casting firm that supplies to aviation, medical and high technology manufacturers; *Scandic*, a custom spring and metal stamping manufacturer supplying electronic and high technology manufacturers; and *Castco Aluminum, Inc.* an aluminum casting foundry that provides specialty assemblies and parts to other technology industries, and specialized firms such as *Applied Fusion Inc.*, a precision mechanical fabricator; *Halus Power Systems*, a specialized manufacturer and remanufacturer of wind power turbines, and *Production Robotics*, an automation design and engineering firm supporting biotechnology, electronics, pharmaceutical, food processing and other manufacturing industries.
- **Instruments and Process Controls** – including companies such as *Pasteurization Technology Group*, (Fig. 24) a leader in sustainable wastewater disinfection combined with energy generation; *Energy Recovery*, a fluid management technology supplier for water, oil, gas and chemical industries; *American Underwater Products*, manufacturer of diving instruments and technology; and the *Kaiser Permanente Health Care Innovation Center*, the “innovation lab” for all of Kaiser’s healing environments and facilities.

As well as these clusters, other firms of various types can be categorized together as:

- **Other, including Plastics and Power** – This group includes firms not in the above categories but also demonstrating high value-adding activity, such as *Sunlink*, a solar panel mounting components manufacturer that makes installations economically feasible; *L3 Communications*, a manufacturer of electronic pulse and shielding technology serving industry and military uses; *Columbia Cosmetics*, a leading private-label cosmetics manufacturer; *Borden Lighting*, a specification-grade lighting fixture manufacturer; *Kennerly-Spratling, Inc.*, a custom injection molder and contract manufacturer; and *Poly-Tek Development Corporation*, a custom cast polymers producer.

Many of these firms are industry leaders and their successes are profiled in *Popular Science*<sup>20</sup> as well as in trade publications. They are not in the most glamorous and attention-getting categories of innovation-driven industries (along with their unique employment cultures) that the Bay Area is most famous for, such as social media network software, high-end computer/smartphone hardware and software, computer videogaming, genetic engineering and biotechnology, or computer animation artistry and production. San Leandro’s clusters consequently do not rise to the top of popular conception of high tech. But make no mistake - these industries are just as crucial to American

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<sup>20</sup> <http://www.pastechgroup.com/index.php/press-release-pasteurization-technology-groups-innovative-wastewater-disinfection-process-receives-popular-science-2011-best-of-whats-new-award>

technological leadership. And, many of their products and services are foundational to the overall success of the Bay Area as a global center of innovative products.

An evocative example of a company's evolution in the district towards advanced manufacturing is INX Digital (Fig. 27), located in a multi-tenant, architecturally-refurbished factory complex on Williams Street that once housed Western Waxed Paper Company (Fig. 36). INX Digital is a specialty manufacturer of inks and processes for high-resolution digital printing. It was spun off in 2002 from Triangle Coatings, a paint and coatings manufacturer founded in Berkeley in 1932 which had moved its manufacturing plant to San Leandro in 1984 and then its headquarters to Livermore<sup>21</sup>. The brightly lit and spacious INX facility is a research and development operation where the firm designs, prototypes and markets custom large-format printers, inks, and processes to order for various clients and companies. It employs highly trained engineers, chemists, industrial designers and lab technicians working in collaboration with multinational team members in and outside the company.

## **2.2. Competitive Weaknesses of the districts include:**

### **2.2.1. *A minority of value-added activities.***

As shown on Figure 11 in the appendix, most district properties have low employment density per square foot. The high proportion of space devoted to warehouse and distribution also correlates to a low “value-added” per square foot factor. The dominance of warehouse use and the scattered locations of manufacturing firms contributes to the perception that not much manufacturing is going on (Figure 19). Conversations with area real estate brokers also confirm this impression.

### **2.2.2. *Legacy: Obsolescent buildings and streets.***

The stock of very large floorplate industrial buildings (as large as 900' x 400' and more, with many in the 700' x 250' range) – many a legacy of 1950s and earlier eras - require extra risk and effort to subdivide for smaller, non-warehouse tenants (which would provide potential incubation spaces for start-up businesses, for example). With the high proportion of warehouse and distribution uses in the district, consistent regional demand for them, and brokers' orientation to that demand, there are few incentives to take on the costs and design complexities of non-warehouse tenant space subdivision. In most cases, brokers will avoid those risks of speculative format re-development. Similarly, no comparable examples or models of co-tenant manufacturing space facilities exist in the district that serve an analogous function to the rise of "co-work" and incubator spaces for downtown office/tech firms. Many existing buildings do not fit modern preferred height standards for warehousing with a 32-foot minimum--most are 28 feet in height or less (Table 4). For many industrial properties, especially older properties with limited unbuilt area available for on-site parking, on-street parking is limited because of the number and width of driveways. Some streets such as West Avenue 104th are lined with continuous rolled curbs for truck dock access, eliminating curbside parking and weakening property convertibility as well as walkability.

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<sup>21</sup> <http://www.tricoat.com/our-history.html>

### **2.2.3. Legacy: Connectivity Challenges.**

There are few through-streets in the district. Many district streets and blocks are configured as “superblocks” and have large parcels with limited street access; a “walk around the block” exceeds two miles in some cases (Fig. 13). Nearly all district through-roads are truck routes, and these truck-dominated roads are sometimes daunting to drivers, bicyclists and pedestrians; they are not yet “complete streets.” With the sprawling 2,000 acre-plus size of the district, the single Links shuttle to BART counterclockwise loop route provides slow access (shuttles every 20 minutes and up to a 40-minute long ride) for employees and others. From informal interviews with area business representatives, though the Links shuttles are free, they are not seen by businesses and employees as a convenient and practical connection. In addition, within the workplace districts, there are only four existing bus shelters among the 19 Links Shuttle stops and two bus shelters among the approximately 30 AC transit bus stops<sup>22</sup>. Most stops lack even bus seating, adding up to a less than rider-friendly experience. Though Williams Street, Fairway Drive, Farallon Drive, Doolittle Drive and Wicks Boulevard provide almost continuous bike lanes along their lengths through the business districts, there are “missing” segments of Merced Street, Westgate Parkway, and Teagarden Street bike lanes that leave gaps with no bike lanes or several miles of detours to take (Fig. 35). Lack of bicycle lane buffers next to truck routes makes for frequently uncomfortable riding and frequent detours by bicyclists onto sidewalks. Finally, though all streets have sidewalks, many are relatively narrow, without physical buffering from truck routes, and are alongside long blank walls and razor wire fences (Fig. 21). Lighting on sidewalks is often uneven, discouraging walking in the district after dark.

### **2.2.4. Legacy: Few services and amenities.**

In interviews we conducted with area business leaders and representatives, the most frequently raised complaint was that there are few (or none, according to some) desirable restaurants and cafes in the district to eat lunch or dinner, particularly for bringing out-of-town guests and collaborators to do business over a meal. Instead, what exists at the edges of the districts are small clusters of fast food restaurants adjacent to the Davis and Marina freeway interchanges; a small cluster of “Mom and Pop” budget, ethnic and coffee shop eateries at the Marina Faire shopping center at the Doolittle/Fairway intersection; and another cluster of similar establishments near the Doolittle/Marina intersection (Fig. 22). The latter two appear to be more oriented to surrounding neighborhoods than to businesses. Inside the districts, about a half dozen highly dispersed, single restaurants or snack bars are scattered throughout - like La Piñata Restaurant and Tequila Bar at Merced and Fairway, or like those almost invisibly occupying one of the lease spaces of a multi-tenant industrial building, as is the case with The Big Cheese at 2194 Edison Avenue or Blue Dish Cafe & Catering at 2956 Teagarden Street. Another common complaint was that there is no national hotel or motel chain of any kind within the industrial areas. Outside the industrial districts, some businesses feel that most hotels within a convenient distance (e.g. the Oakland Airport area) are aging and not presentable to visiting clients and collaborators.

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<sup>22</sup> Counted from the LINKS shuttle route map and from Google Maps graphics, aerial photos, and street views.



From a district identity standpoint, there is no central business “activity center” for the districts – i.e. no “there” there, meaning an attractive focal sub-district or cluster where not only the aforementioned dining and lodging facilities would be readily found, but also professional and personal services such as a copy and shipping center, a dry cleaners, hair cutters and salons - and convenient after-work and socializing facilities such as exercise gyms, yoga studios, and brew pubs, sports bars, and the like. Adjacent well-recognized retail clusters or centers can often serve this role for industrial, mixed industrial or transformed industrial districts in other cities. For example, in Emeryville, the Public Market, Powell Street Plaza, Bay Street center and their adjacent hotels serve this role for nearby Novartis Labs and other biotech firms, Pixar Studios, Clif Bar & Company and other Hollis Street businesses (Fig. 23). In addition to providing services and a “sense of place,” they can help generate a real estate and activity focus, and differentiation in an otherwise large area of single use and undifferentiated value pattern - and help stimulate investment. In San Leandro, however, there is no similar cluster match for the industrial areas. Marina Square does host a Starbucks and a FedEx center at a corner, but the rest of its outlet mall format does not draw in frequent local visits. Westgate's medium and big box anchors similarly do not readily serve these purposes (though Drake's Brewery does add interest). In both cases, both shopping centers are internally focused, are essentially walled off from their side and rear surroundings, and are not walkably well-connected to their neighborhoods. Meanwhile, downtown is too distant a trip except for the districts' easternmost businesses.

#### ***2.2.5. Weak Sense of Place/Regional Image.***

There is little distinguishing San Leandro's industrial districts from Oakland's industrial area east of Oakland Airport, which extends continuously across the Oakland/San Leandro border. Unfortunately, very few district buildings date from the prewar era of quaint brick warehouses so memorable and beloved of San Francisco's South of Market or Portland's Pearl District - or for that matter, West Berkeley and West Oakland (Figs. 7 & 8). Overall, the industrial districts' building fabric exhibits what could be called a “regular irregularity” of mostly repetitive, box-like, horizontal cement plaster-clad or tilt-up concrete buildings at various scales for miles in any direction, with blank beige, white and pastel walls dominating most views. Buildings and sites do not exhibit much directional hierarchy in terms of identifiable fronts, backs and sides (Fig. 19). Setbacks of buildings along any side are used as parking lots, loading yards, or occasional strips of lawn and tufts of shrubs with little predictable consistency. These combine with the superblock pattern and traffic-dominated through-streets to powerfully erode the sense of place and wayfinding in the district, especially for newcomers.

Properties can often vary in quality along the same street frontage, from a manicured industrial park development next to a tattered chain-link fence around a trucking yard. This creates poor investment predictability - a higher quality development with good maintenance may be surrounded by haphazardly sited and poorly maintained buildings and properties of lower quality, such that the higher quality development can never achieve the real estate value that it could on a street of developments with consistent frontage orientations, landscaping, architectural expression, and maintenance. The Columbia Cosmetics Manufacturing Inc. facility on Timothy Drive has this condition, as does the well-landscaped complex in the cul-de-sac on Bigge Street.

### **2.2.6. A Number of Disengaged Businesses.**

In interviews, many firms acknowledged that San Leandro has provided a low-cost, convenient location, and that up to that point, the weaknesses did not rise to the level of motivating them to consider relocation. Some commented anecdotally on experiences and perceptions of petty crime, and employees' after-dark fears for personal safety while walking to their on-street parked cars; one comment concerned the difficulty of commuting to and from work among heavy trucks. There did not appear to be much to tie them to the place in terms of a district business culture or larger business community orientation and engagement. Most businesses are focused on the absorbing requirements of their own work. This appears to suggest that many firms may not identify strongly with being in the city or the district, and with the perceived lack of place amenities, there is little to keep them here if their spatial or other needs cannot be met.

## **2.3. Opportunities for the Districts include:**

### **2.3.1. *Advanced manufacturing is growing.***

Within the last two years, the low-cost advantages of manufacturing in China have weakened<sup>23</sup> and some American firms are returning their operations to the United States<sup>24</sup>. Increasing labor and shipping costs, delayed response times, intellectual property concerns, and advancing automation are all factors. This is especially so in food, niche apparel, and computer-controlled machining - sectors that also do not always want large footprint plants and instead must respond rapidly to nearby customers and markets. From interviews, we learned that there are San Leandro businesses considering "re-onshoring" of machinist and other skilled worker jobs.

### **2.3.2. *Berkeley and Emeryville are tight on manufacturing space.***

Berkeley's per square foot industrial building costs are about twice that of San Leandro's<sup>25</sup> and its regulatory environment is highly constrained by the West Berkeley Plan (see also Table 1).

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<sup>23</sup> "The end of cheap China - What do soaring Chinese wages mean for global manufacturing?," *The Economist*. <http://www.economist.com/node/21549956> London: The Economist Newspaper, March 10, 2012.

<sup>24</sup> "Reshoring manufacturing: Coming home - A growing number of American companies are moving their manufacturing back to the United States," *The Economist*. <http://www.economist.com/news/special-report/21569570-growing-number-american-companies-are-moving-their-manufacturing-back-united> London: The Economist Newspaper, January 19, 2013.

<sup>25</sup> Based on June 2013 conversations between Rod Stevens and Steve Smith, broker with Norheim and Yost, a boutique industrial real estate firm in Berkeley. These conversations included discussion of the problems with data from some of the larger brokerage houses (which do few deals in Berkeley), and why the comparatively narrow range of asking rates for different markets do not reflect the much greater range of vacancies. Smith provided examples of recent property searches (and closed transactions) in which the buyer searched for properties in both Berkeley and San Leandro.

### **2.3.3. *Kaiser's imminent opening offers a "marketing moment."***

This one billion-dollar investment changes the literal "image of the city" - the western skyline from I-880 - and creates a new reason for people to set foot in the district. Kaiser Permanente hospitals tend to be self-contained within their own networks of laboratories and ancillary goods and services suppliers, located either on-site or outside the city. As such, there may not be strong potential for a substantial influx of medical-related businesses into the district that are economically anchored by the Kaiser Hospital. However, a sprinkling of small independent medical businesses is already moving into properties adjacent to the new facility. The new hospital's 2,300+ employees are slated to begin arriving in spring of 2014, with hundreds of daily patients and their families and visitors to add to the flow later in the year. This will create an influx of never-before-seen visitors to the industrial area west of I-880. The benefits to the district beyond this are not yet clear.

## **2.4 Threats From Competing Areas include:**

### **2.4.1. *Fremont, Milpitas, and Livermore.***

These East Bay cities have a larger and more modern stock of manufacturing buildings and are mounting aggressive economic development efforts. Fremont and Milpitas have long been considered the eastern edge of the Silicon Valley and already interact considerably with its high technology business ecosystem. Livermore has built innovation partnerships between its industrial area firms and the Lawrence Livermore National Laboratories under its iHub designation.

### **2.4.2. *The Oakland Army Base, Jingletown, and Alameda.***

Despite Oakland's real and perceived problems, these areas will be strong competitors, especially for creative urban manufacturing businesses. Their districts may have community touchstones (like Jingletown's Institute of Mosaic Art) and transit proximities (nearer BART stations) that are lacking in San Leandro. The Oakland Army Base site is very close to the strong Emeryville biotech market, and could ultimately develop with large biotech users there that draw in other office and high value-added companies around them.

### **2.4.3. *Hayward.***

The city is in the process of enabling its own fiber optic loop and may make this service available in 3 to 5 years. Hayward has large inventories of industrial land and closer proximity to Silicon Valley, a major market for value-added manufacturing companies like Scandic.

### **2.4.4. *San Francisco.***

The city is now a center for high-value manufacturing, has many entrepreneurs, boasts innovative manufacturing leadership and organizational support from the SFMade nonprofit organization<sup>26</sup> working cooperatively with city government, and firms want to stay there in spite of high costs. New

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<sup>26</sup> [www.sfmade.org](http://www.sfmade.org)

buildings will be likely to be constructed in the next five to ten years, possibly bringing back the “vertical industrial” model of manufacturing and shop space prevalent before World War I.

## **3: The Strategy for Change**

### **3.1 Three Primary Strategies**

To strategically position the districts advantageously for the forces of change confronting these historically industrial workplace areas, we recommend three primary strategies:

#### **3.1.1. Boost value-added companies.**

The City Council's economic initiatives of January 2013 included a directive to specifically, "Undertake programs and advance projects promoting sustainable economic development, including transforming San Leandro into a center for innovation." The measures that the City has employed to shift downtown towards transit-oriented development, develop and attract a tech campus, promote use of the LitSanLeandro fiber loop, introduce food trucks and events to create new ambience and more diverse cultural choices are all strong steps in this direction. Taking measures in the industrial districts to nurture and attract value-added companies and entrepreneurs to locate to and expand there and strengthening its business livability will make innovation not just a downtown phenomena of software and high-end service industry, but also of San Leandro's industrial areas and its heritage of making things. With the districts' current large square footages of low-density, low value-added use, even a small shift in the percentage of that space to advanced manufacturing and related industrial uses - particularly by building on the specializations still found in the districts - would increase the quality as well as quantity of employment. We cannot guarantee that all of those jobs would go to San Leandrans, but "higher value-added" will potentially create stronger fiscal benefits to the City, network benefits to the business and innovation ecosystem, and a broader base of civic image and pride as well.

#### **3.1.2. Engage existing customers.**

Past policies were focused on attracting large firms to town with low taxes, land write downs and utilitarian infrastructure. That made sense in an assembly-line era when large firms created value. The 21st Century innovation environment is one of networks, supply chains and horizontal collaboration - a much different business landscape. Changing San Leandro's industrial landscape starts with the City having a better knowledge of and relationships with existing value-added companies of the kind that the city wants more of. Not only are these firms already there and producing jobs, but they are the best source of referrals for new business. You will want them talking up the place at their next industry conference. You will want them telling other companies in their supply chain that this is a good place to do business. But how to get them involved? A manager running a computerized chocolate factory is probably not going to take two hours off in the middle of the day to attend a planning meeting. You have to make it worth their while to get involved, to take care of a street parking or missing sign problem today. Only then will they get involved in the longer-term planning issues. Various measures to

engage these existing businesses are described in the Near Term Actions and Longer Term Actions following.

### **3.1.3. Humanize the place.**

With the 21st Century transformations in business and industry, workplace districts must now be tools to help attract, nurture and retain talent - they have to be real places that have services and experiences that all workers and entrepreneurs want nearby. This is increasingly so with younger ("Millennial") generation workers who have different attitudes towards work-life balance and locational preferences for activities. In turn, employers are looking for their locations to help them attract talented employees, as well as provide appealing places to bring clients, partners and collaborators. Starting today to strengthen workplace livability and emphasize the maker heritage of the workplace districts will not only make the districts more attractive and convenient for businesses and employees - they will also help make San Leandro a more "complete community" in which residents will have reasons to visit and care about the quarter of the city that comprises the industrial areas. A stronger city and community identity will be the result.

Based on our interviews with businesses, the first frontier to address is the provision of better and more varied eating opportunities, via establishment of a "Food Pod" with multiple food carts (Figs. 31 & 32); the first location and timeframe in which to accomplish this is the Merced Street corridor in between the Marina Boulevard district entrance and the new Kaiser Hospital, in time for the arrival of thousands of new employees and visitors upon its opening in 2014. These first initiatives are linked with identifying and growing a north-south street corridor "spine" of activity, the Merced Street/Westgate Parkway spine as a possible workplace "main street" corridor of businesses and activity clusters (Fig. 28). This spine would be anchored on its north end by the Westgate Center and on the south by the Kaiser Hospital campus. In between would lie the gateway Marina Boulevard/Merced Street intersection, and a recommended redefinition of the "Kaiser North" retail site as a future district business activity center (see description under item 3.3.3.2.2.1.) (Figs. 29 & 30). Also, the "spine" is proposed as a means of recognizing and tying in a series of potential development opportunity parcel sites that have been mapped on a "Vulnerability to Change" map (Fig. 18 and following notes). The larger framework for identifying this corridor and others is what we call a "Boulevards and Back Streets" strategy that recognizes the street and block structure of the district and the potentially different development potentials based on how properties can differently engage the two different types of street environment and ultimately achieve value (Figs. 14, 15, 16, & 17).

The large-scale and longer term planning perspective, however, is the framework inside of which a series of low cost, "do-able" and tactical measure may more readily be undertaken by the City (and possibly in partnership with businesses and groups). Recognizing that funds are highly constrained in the post-redevelopment environment, the scale and pacing of recommendations that follow in the Near Term Actions are conceived more as a series of "infield hits" for greater feasibility and concurrence with maintaining momentum and the marketing window of the Kaiser Hospital opening - rather than emphasis on "home runs." Nonetheless, the upcoming General Plan Update is an important opportunity to restate and redefine the vision and larger framework for the Industrial Districts as 21st Century Workplace Districts.

## 3.2 Strategic Themes

These are overarching themes that inform both the primary strategies and the specific recommendations. They should be borne in mind for both the big picture as well as incremental on-the-ground implementations.

### 3.2.1. “Value-added per acre”

Nurture and attract a greater proportion of advanced manufacturing businesses to the industrial districts which employ a greater proportion of skilled labor. Create both the business ecosystem and the physical settings to encourage them. Both humans and machines can add value. For humans, this may be through designing, programming, machining, and finishing. For machines, this might be with a sophisticated device that stamps, mills, prints or otherwise produces a non-commodity product, frequently requiring a number of hours from a support technician to set up, run and maintain the machine. The real advances from advanced technology will come from bringing skilled workers together with the right level of technology.

### 3.2.2. “Bite-Sized Pieces”

Use an incremental approach to making this place attractive to entrepreneurs and the talented people they employ. Develop a “Boulevards and Back Streets” strategy that initially encourages redevelopments of smaller properties/buildings for entrepreneurial and start-up businesses (“Back Streets”) while also adding layers of improvement on the “gateway” places (“Boulevards,” like the Merced Street spine between the Marina off-ramp and Kaiser Hospital).

### 3.2.3. “Make it Real”

Given the size, age and “20<sup>th</sup> Century” character of the industrial areas at present, regulation and promotion are not enough without real, tangible place change. Focus investment, both public and private, in a few places that plant the seeds of change and make it visible and credible. Prospective investors, developers and company manufacturers driving through the area need to see concrete change that give credibility to new General Plan policies. These “postcard views” of public and private reinvestment in the area will ensure new people that they will not be alone in bringing their money and people to the area.

### 3.2.4. “Skin In the Game”

Recruit engaged partners who will put time and money in the effort. This includes the Chamber of Commerce, existing users, developers, investors and other government agencies. Get the K-12 system, the community college, organized labor, and other education and training providers involved and invested as well. Time spent on more distant organizations that are willing to pass on San Leandro news but don’t actually help with the work is nice, but not so necessary. Economic development requires competing with neighboring cities and places to attract investment and talent here. Any organization that the city partners with should have enough of an investment in the San Leandro outcome that it is one of their highest priorities.

### 3.2.5 "Sell Yourself First."

The community (businesses, property owners and San Leandro citizens) needs to know that change is possible and worthy of public investment. If the community itself does not believe in the effort, no amount of sales to outsiders will succeed.

For years, San Leandro has been losing companies and manufacturing to the point that the community does not know that it still has many good businesses left and, even more importantly, the skills necessary to succeed in advanced manufacturing. The referrals from city residents and existing businesses must be there so that this is seen and felt to be a place with a future, and that the community itself is committed to making the improvements necessary for this change.

## 3.3 Near-Term Actions

### 3.3.1. PROGRAMS

**3.3.1.1. Call and/or meet with existing companies on a regular basis**, giving particular attention to basic city issues such as on-street parking and security. For example, every Tuesday a specific staff person might spend the morning meeting with local business people in their offices and the afternoon setting up future appointments. Assuming about an hour for each outside meeting, this would allow four meetings a week or about 200 a year. Assuming three meetings per company per year, this would create strong relationships with 60 companies or more, an outstanding basis for understanding their business, identifying obstacles and challenges to their growth, and consensus for district-wide improvements. ***The importance of this measure cannot be overemphasized.***

**3.3.1.2. To create new, varied and moderate cost eating options in the district and generate excitement and enthusiasm, work collaboratively with the Chamber of Commerce, industrial council(s) and district private property owners to create "food pods" on private properties in selected priority locations.** The focus here is on food carts rather than food trucks, since carts are stationary and require a much lower level of investment (Fig. 31). These can be attracted in "pods" of five to 20 carts requiring relatively little space (typically the equivalent of one auto parking space per cart) while providing diverse offerings. Sites would need to be accessible from public sidewalks, and/or from parking lots made available by owners. Initial examples may be temporary to serve as demonstration projects; temporary uses of vacant sites that are awaiting development, especially future retail sites (Fig. 32); or visible and conveniently accessible groups of designated parking stalls within available parking lots. Other examples in more limited locations may include temporary or permanent configuration of frontage landscape areas adjoining public sidewalks as seating areas, such as on a side street or cul-de-sac ("Back Street") location. Another option for a Back Street location where no open space is available as an eating area is the construction of a "parklet" platform as a type of mini-plaza to



fill a curbside parallel parking space location. Food carts would be sited either on adjacent parking stalls or at a private open frontage parking lot, though the former in particular may be constrained due to typically high demand for on-street parking spaces.

**3.3.1.2.1. The highest priority location should be a "Boulevard" site along the Merced Street corridor** between Marina Blvd. and the Kaiser Hospital site, to coincide with the marketing window of the 2014 Kaiser Hospital opening and its influx of new employees, patients, and visitors.

**3.3.1.2.2. The highest priority, near term "Back Street" (satellite) locations should be along Hester Street and at the Farallon Drive/Catalina Street intersection,** due to their northern and southern locations away from the Marina/Merced site (i.e. distribution in the district), the presence of existing businesses with higher employee density, and new buildings and/or incoming tenants (Fig. 33).

**3.3.1.2.3. To the extent possible, food pod sites should be co-located with near term City- or partnership-sponsored capital improvements to streetscapes for revitalization and marketing momentum,** such as supplemental pedestrian-scale light fixtures, added transit stop seating, crosswalk improvements, public art, etc.

**3.3.1.2.4. The City along with its partners should help serve a matchmaking role to connect property owners with potential manager(s) of a food pod.** Use the "bully pulpit" of the city's vision and initiative to recruit supportive businesses and property owners to reach agreement on temporary hosting of food pods to start.

**3.3.1.2.5. See Capital Improvements and Regulations for supportive measures.**

**3.3.1.3. Create a branding program with a simple and direct message like "We Make Things."** Own that verb and coordinate promotion with the Chamber of Commerce, Lit San Leandro and even organizations like workforce development councils. Any slogan involves certain trade-offs, but the simpler the better, especially if you are bold enough to use the subject "We" and an active verb like "make". In a world in which the business news is full of details on software companies and biotech firms, there is a tangibility to the words "make" and "things" that will appeal to people, especially those who work with machines.

**3.3.1.4. Develop faster and more frequent employee shuttle service route(s) to the BART station.**

Given the size of the districts, more than one route is likely to be needed for short and usable ride lengths. With Kaiser Permanente obligated to provide BART shuttle service, look for ways to achieve a city/LINKS partnership with Kaiser on that route, and service workplace sites near Kaiser as well as the hospital itself with the same route. The current LINKS route runs counterclockwise, which carries inherent delays in making left turns across traffic. A compact and clockwise route for Kaiser Hospital and other nearby stops along Alvarado, Fairway, Merced

and Williams could avoid the congested Davis and Marina corridors, though one of the routes will need to provide service to key locations on those corridors.

**3.3.1.5. Continue initiatives and programs to promote business-to-business relationships.** In the current General Plan, previously identified measures included "...tax incentives for businesses which purchase goods and services from local suppliers, business links through the City's website, and sponsorship of groups like the Industrial Roundtable ." (General Plan 3-45)

**3.3.1.6. Work with industrial councils, organized labor, area educators and the Chamber of Commerce to inventory the current providers of workforce training and education in the district, and programs in and near the city of relevance to advanced manufacturing and employment.** Several managers said that there the local school system and community college provided little or no relevant training for most of their employees. Map the locations of existing venues relative to activity centers and transit, bicycle and pedestrian access. Establish a contact list for the K-12 school system, community colleges, unions, and non-profit and for-profit training organizations and work to involve these organizations in the City and Chamber's outreach efforts. This work will set the stage for further integration and linkages.

**3.3.1.7. Continue to actively promote the City's current façade and front yard improvement programs** for existing businesses. Evaluate the present program for its track record of usage and successful project completions within the industrial areas. Focus and actively solicit businesses' usage of the program at priority corridor and satellite "seed" sites for synergy with other district improvement efforts. Though matching grants are desirable to get commitment by the business, also consider an optional program for limited and fully-paid sign replacement or upgrade grants as a tool to achieve rapid, low cost, and targeted results. For sign grants, a creative and qualified sign designer/fabricator that is familiar with city codes and district goals should be pre-selected. ***These programs need to be actively publicized to companies in the industrial districts.***

**3.3.1.8. Promote better design in the districts with peer awards for the best recent developments (including public as well as private projects).** The value of this is in education and messaging on raising the quality bar for the workplace districts. While the Chamber of Commerce and its San Leandro by Design program is best positioned to lead on this, greater benefit will be achieved by active linkage between city reports of new projects and shared promotion of design excellence examples through website links, news releases, promotional literature, and community events. In self-confident communities, we have seen award programs that also usefully critique substandard designs as well as reward excellence (with an "Orchids and Onions" program); it may be that the area is not ready for that yet, but could be in the future.

**3.3.1.9. Publicize code enforcement.** To combat neglect and improve the sense of place in the industrial areas, it is important for businesses and residents alike to see how everyone is responsible for property upkeep. For example, the City of Temple City, near Pasadena, the weekly City

Manager's report has before-and-after photos of successful corrections to code and maintenance infractions<sup>27</sup>.

### **3.3.2. CAPITAL IMPROVEMENTS**

**3.3.2.1. Reconfigure on-street parking striping and signs where feasible to increase parking near major employers** (potential example: Hester Street). Where street widths and driveway locations permit, change parallel curbside parking to angled or perpendicular, with paint striping. As properties redevelop, look for opportunities to close driveways or reduce curb-cut widths to increase curbside parking. Physical features can follow later (bulb-outs, etc.)

**3.3.2.2. Assist the implementation of "Food Pods"** on Merced near Kaiser Hospital, on Hester Street, and near the Farallon Drive and Catalina Street intersection (see item 3.3.1.2. above) as initial installations (Fig. 31). Where private properties cannot fully support both food pods and eating areas, consider utilizing a "parklet" platform occupying a curbside parking stall to assist with successful implementation (balancing this with on-street parking demand), or restriping of parking stalls if feasible and supportive. To the degree possible, co-locate food pods with incremental street improvement programs listed in item 3.2.2.2. following for maximizing the visibility and momentum of change.

**3.3.2.3. Implement small-scale, low cost, visible and incremental streetscape improvements at select locations in the industrial areas as tactical measures to build a sense of momentum and change.**

**3.3.2.3.1. The recommended initial streetscape improvement location priorities are as follows:**

**First Priority - "Boulevard Street":** Merced Street between Williams Street and Wicks Boulevard, and Williams Street from Merced Street to Westgate Parkway (Fig. 28).

**Second Priority - "Back Streets" (supplemental pedestrian lighting first, others as feasible):** Hester Street, the Farallon Drive and Catalina Street intersection, and Timothy Drive between Williams Street and its northerly industrial/residential use boundary (Figs. 33 & 34).

**Third Priority: 2nd phase of "Boulevard Street":** Westgate Parkway from Williams to Davis Street (Fig. 28).

**3.3.2.3.2. The recommended initial streetscape improvement type priorities are as follows (with approximate magnitudes of cost on a scale from \$ to \$\$\$\$\$, though this will depend on the geographic extents of project installations):**

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<sup>27</sup>An example of the Temple City, California report may be found at <http://www.templecity.us/CM%20Reports/2013/7-19-13.pdf>

**First Priority: Install add-on pedestrian streetlights at existing roadway poles (\$\$).**

(Fig. 34) To increase the amount of pedestrian lighting for perceived safety, freshen the night-time appearance of the street, and add distinctiveness to the day-time streetscape at relatively low cost, install add-on LED pedestrian-height luminaires and arms to existing "cobrahead" streetlight poles. Fixtures can have a "tech" style to complement and emphasize the district's identity. The quantity of pedestrian luminaires and arms would be two per pole, on opposite sides and arms parallel to the curb at approximately 16 foot height at "Boulevard" locations, and one per pole at "Back Street" locations. At all locations, upgrade the existing high pressure sodium roadway-height luminaire on the same pole to an LED source. This should enable the existing wiring and circuitry to supply the 2 to 3 upgraded fixtures on the one pole without requiring new footings, trenching, etc. This configuration will need review and design of the lighting and electrical aspects by an electrical engineer. A future higher cost expansion for consideration may involve installation of supplemental new pedestrian-height streetlights in between the long distance between existing cobrahead-type roadway streetlights, as shown on the right side of the example image. Consider repainting the streetlights along these segments with a distinctive district color (as well as all metal streetscape furnishings).

**Second Priority: Install bus shelter structures and bus seating (\$\$).** At select high visibility locations along transit routes (on Merced Street between Wicks Boulevard and Williams Street in a first phase), install bus shelters to match newer models used elsewhere in the city, especially where they may be used by Kaiser Hospital patients, families, and employees. For bus stop locations lacking benches or currently served by unsightly "ad" benches, remove the "ad" benches and replace them with attractive all-metal (for durability) bus seating that is aesthetically compatible with shelters, lighting and other furnishings. Use the same paint color palette for all metal furnishings and streetlights in the district.

**Third Priority: Install high visibility crosswalk markings at crosswalks (\$).** At select high visibility crosswalk locations on "Boulevard Streets: (on Merced Street between Wicks Boulevard and Williams Street in a first phase), install high-visibility crosswalk markings in the roadway pavement, especially where they may be used by Kaiser Hospital patients, families, and employees. Use "piano key" thermoplastic striping at a minimum, or develop an industrial district-themed custom pattern of a "Streetprint" or equivalent decorative thermoplastic colored infill pattern (between standard white crosswalk bars). The latter has already been installed by the City at locations between downtown and the BART station, though with a standard manufacturer's catalog pattern. Phase the expansion of their installation with a focus on other higher-pedestrian-traffic locations.

**Fourth Priority: Install Public Art based on Industrial District artifacts and thematic imagery (\$\$).** Work with public artist(s), area community groups, businesses, and residents for potential historic artifact and art materials sources, and potential funding property owners and companies interested out of "community citizen" motivations or publicity, to develop concepts and

implementations of public art in the industrial areas that put the "maker" history and historic products of the past, present and future on display, to provide education, raise community awareness and pride, and embellish the public realm.

**Fifth Priority: Improved district wayfinding signage (\$\$)**, with a focus on new visitation relating to Kaiser Hospital visitors.

**Sixth Priority: Pedestrian sidewalk corner bulb-outs (\$\$\$)**. To shorten the length of crossing the street for pedestrians at intersections during the signal cycle (particularly for seniors and children), where feasible given truck routes and wide radius truck turns, install corner extensions of curbed sidewalk (referred to as "bulb-outs:"). This typically involves greater expense due to demolitions and new construction. However, there may be some benefits to improved signal timing due to the shorter pedestrian crossing cycle.

**3.3.2.4. Complete the missing segments of bike routes in the industrial areas as indicated in the bike master plan, and plan for upgrading of buffering between vehicles and bicycles.** (Fig. 35)

These include segments of bike lanes not yet present along Merced Street and Westgate Parkway. The current Merced Street construction work associated with Kaiser Hospital is adding dedicated bike lanes, but there may remain portions north of Marina Boulevard and south of Fairway Drive that remain uncompleted. In addition, there are immediate opportunities for existing bike lanes to be provided buffering from vehicular traffic with striping alone (\$). Portions of Doolittle Drive, the Fairway Drive crossing of I-880, and Alvarado Street have segments that are presently "bike-friendly" but do not yet have dedicated bike lanes should also be evaluated for upgrading. Where possible, plan for future upgrade of major bike routes to "cycle tracks" with physical buffer features (vertical bollards, curbed median islands, planting, etc. - \$\$\$); these measures will increase both the perception and the experience of safety, and encourage bicycle use by workers, students, and residents both to and through the district.

**3.3.3. REGULATIONS**

**3.3.3.1. Update regulations and services as needed to enable the creation of "food pods" with emphasis on multiple fixed food carts, as described above in Section 3.3.1.2.**

**3.3.3.1.1. Create procedural guidance**, such as an information sheet with regulatory checklist and/or application form for potential food cart entrepreneurs, to assist in streamlining the set-up process.

**3.3.3.2. In the General Plan update, develop specific goals and actions for the industrial district to incorporate and implement the three primary strategies and build education and community support.** Recommendations below are made in reference to existing General Plan sections, which are anticipated to potentially be reorganized in an update.

**3.3.3.2.1. Updated policies should specifically promote higher value-added per square foot businesses and higher employment density uses, and outline how to reconfigure**

**areas of the industrial districts to nurture and attract them.** The current General Plan Land Use subchapter "Business and Industry" (3-43) contained the following discussion regarding Industrial Districts:

"To take full advantage of the City's economic potential, older industrial buildings and sites will need to be adapted for contemporary uses. Redevelopment project areas have been formed in most of the City's industrial districts to facilitate this process. Redevelopment and economic assistance programs have already begun to reshape the areas around the Downtown BART Station and along Marina Boulevard. In other areas, the emphasis has been on adaptive reuse. For instance, the former Kaiser Aerotech plant has been adapted for long term airport parking, and the former Aluserve plant on Davis Street has been adapted for cotton processing. Similar opportunities exist at the Kellogg's plant on Williams Street, and at several other former manufacturing sites. In some cases, interim uses of such buildings may take place until market conditions justify more comprehensive reuse of the sites." (3-45)

Adaptive re-use is a necessary, practical and in many cases obligatory approach to ensure property tenancy. However, opportunistic and undirected adaptive re-use has gradually resulted in predominance of low employment density and low value-added per square foot uses (such as with transitions from manufacturing to warehouse use, or manufacturing to parking) for much of the industrial areas, and scattered isolation of higher value-added manufacturing uses. With the loss of redevelopment and tax-increment financing as a municipal economic tool, the City will need to increase collaboration with private business, nonprofit, and training partners to strengthen innovation-driven business and employment opportunities. It will also need to combine "tactical" programs, capital improvements, and regulatory changes that only the City can lead on and orchestrate. This needs to be specifically out in the General Plan.

**3.3.3.2.2. Under Goal 7, Industrial and Office Districts of Chapter 3 Land Use - BUSINESS AND INDUSTRY Goals, Policies and Actions (3-59), recommended modifications include the following overall and WEST SAN LEANDRO BUSINESS DISTRICT items:**

**3.3.3.2.2.1. Create a Business District "Activity Center" cluster at the "Kaiser North" retail parcel (as well as adjacent parcels),** (Figs. 29 & 30) to include mixed workplace and district-supporting uses such as restaurants and cafes, business hotel(s), meeting and conference spaces, co-work facilities, education and training facilities, business services, exercise gyms and spas, personal services, *and upper story office and workspaces* (the latter may require further discussion and zoning modification). These types of mixed uses in the same cluster, properly configured, will provide a base of

synergistic market support for each sub-use, and a stronger collective "draw" for economic sustainability. Commercial feasibility of these retail and business district services will be greatest if clustered in an anchored format and co-located with the Marina Boulevard I-880 exit, and direct access to the employee/patient/visitor flow to and from Kaiser Hospital. This type of cluster should have an active street presence with a walkable sidewalk and continuous ground floor shopfronts along its main "Boulevard" frontage street (Merced Street) as well as along interior activity streets, alleys and plaza spaces, including visible outdoor dining areas. It should not be a closed, parking-lot focused, internalized development; it should instead engage streets and properties to promote activity, improved workplace district identity, and catalyzing of adjacent real estate investment. This kind of development may not be immediately feasible all in one phase, but it is very important to the long-term economic health of the surrounding jobs base.

**3.3.3.2.2.2. Identify the Westgate Parkway/Merced Street corridor as a north-south focal "Boulevard" spine development corridor.** (Fig. 28) The industrial areas lack north-south street and business activity corridors (Fig. 14) - Doolittle Drive to the west is remote, relatively low in activity and intensity, and discontinuous with intermittent residential segments; Alvarado Street to the east, though linked to BART and downtown, is also discontinuous with intermittent residential segments and somewhat low in activity. The Westgate Parkway/Merced corridor is potentially focal and connective of major activity anchors, is central to all of the industrial areas, and incorporates the two critical freeway interchanges. Create policies, capital improvements and regulations to create a "business main street" boulevard corridor that, over time, links value and activity anchors - the Westgate Center shopping mall (including its potential innovation cluster/business center) and I-880 Davis interchange at its north end and the Kaiser Hospital campus at its south end. In between, the potential Business District Activity Center (Kaiser North Retail Site) (Fig. 29) and the Merced/Marina intersection will be other important gateway and activity sites. Implement a series of incremental street improvements (lighting, bicycle, transit, pedestrian) to raise the profile of the street as a visible and distinctive place and business address. Promote value-adding business uses at corridor opportunity sites.

**3.3.3.2.2.3. Consider modifying "Hotels in Industrial Zones"** to de-emphasize or restrict hotel use from sites where they would be isolated and not walkable to restaurants, services and transit - and not be likely to help create active places and local synergistic benefit.



**3.3.3.2.2.4. Identify "business livability" as an important place characteristic for business and industrial districts**, as means to attract, recruit and retain talented and entrepreneurial businesses and employees in an innovation-driven economy. This would include the availability of a variety of eating places including business class restaurants for luncheons and meetings, high quality lodging for visiting clients and partners, and business and personal services in a clustered and walkable format. It would include mobility options such as convenient transit, carshare, and safer and more bikeable and walkable streets, both day and night. It would also identify the incremental creation of an improved public realm and sense of place in workplace districts with an improved streetscape hierarchy, urban greening, "complete streets" and improvement of building facades and property frontages. Such measures will also be likely to attract residents and others from neighborhoods outside the business areas, thereby reducing the longstanding isolation of the industrial areas and strengthening their care and integration into a more "complete community."

**3.3.3.2.2.5. Identify the "Boulevards and Back Streets" development pattern within the Industrial Districts** - (Fig. 14, 15, 16, & 17) differentiating between major through-street corridors (Boulevards) and smaller cul-de-sacs and side streets (Back Streets) as a basis for focused development policies and zoning modifications.

**3.3.3.2.2.6. Continue to protect industrial land use, though with a broader inclusion of compatible workplace district uses.** Enable upper story office and workspace use only at the Merced Street Business Activity Center (a.k.a. Kaiser North site). Also, ensure the permitting of new mixed manufacturing uses and formats throughout the district that are arising as part of urban innovation.

**3.3.3.2.2.7. At "Back Streets" locations with clusters of small increment parcelization, consider modifying land use and zoning to enable live-work manufacturing and live-work craft studios** (Figs. 15 & 17) to attract and support more creative and entrepreneurial business operations. A possible example location would be the approximately one-block length of Timothy Drive between Williams Street and the boundary between residential and industrial uses to the north.

**3.3.3.2.2.8. Outline the purpose and potential for future form-based regulations** to strengthen investment reliability in the industrial areas, focus more on development performance to potentially allow greater use flexibility, and complement public realm investments and improvements.

**3.3.3.2.2.9. Within the context of form-based regulations, envision the transitioning of the superblock structure to smaller blocks and new streets,** to support business diversity and incubation in the longer term (Fig. 37). Assist with the potential re-use of abandoned or disused rail spur right-of-ways as potential new streets or walking/biking paths. Use maximum block size regulations and other tools.

## **3.4 Longer-Term Actions**

### **3.4.1. PROGRAMS**

**3.4.1.1. Continue to promote and partner with businesses networking organizations to strengthen supply chains and solve mutual problems.**

**3.4.1.2. Create a series of company profiles and people biographies celebrating the kinds of work that the city wants more of.**

**3.4.1.3. Actively engage the K-12 school system, community colleges, unions, and non-profit and for-profit training organizations** in the development of the area, linking them up with companies to better meet the needs of those engaged in advanced manufacturing and allied innovation-driven businesses.

**3.4.1.3.1. Connect education and training initiatives with business networking organizations and councils.** Establish and enhance opportunities for exposure between businesses with students and employee candidates, internships, on-the-job training and skills upgrading, and networking.

**3.4.1.3.2. Help new and relocating training and education venues to co-locate with activity centers where possible, and to be sited at transit, bicycle and pedestrian-accessible locations.**

**3.4.1.4. Encourage adaptive re-use of former large factory complexes and large footprint buildings into smaller, more human-scale places that meet the needs of a variety of companies.** (Fig. 36) Ensure that projects that exemplify how this has been done are what updated zoning permits and promotes, and refer investors to those examples as templates and guidance for more reliable and rapid development approvals.

**3.4.1.5. Promote the idea of “complete community,” in which residents will benefit from the industrial districts** providing good places to work, learn, get healthcare, dine, and connect between neighborhoods and to waterfront open spaces - as well as pay its fair share of city revenues.

This will require time and education to shift the public's perception of how the industrial areas relate to the rest of the city.

### **3.4.2. CAPITAL IMPROVEMENTS**

- 3.4.2.1. Expand improvement of selected street segments or intersection areas** with add-on LED pedestrian lighting (Fig. 34), bus shelters or seating, high visibility crosswalk markings, wayfinding signage, corner bulb-outs, and public art that stresses the district's industrial heritage, sharing the cost of these with property owners and companies seeking "community citizen" publicity.  
After 3.3.2.3.1, Fourth Priority: Alvarado, Williams, Fairway/Aladdin, Wicks, Farallon, Doolittle.
- 3.4.2.2. After evaluation of first phase food pods (and parklets if utilized), consider expansion to additional workplace district areas on both sides of I-880.** Locations to consider could include a site in the frontage parking area of Westgate Center to focus and attract pedestrian activity.
- 3.4.2.3. Identify and implement a means of directly connecting and/or facilitating the north-south traffic flow from Westgate Parkway to Merced Street and vice versa via the existing Williams Street "dogleg" connection.** This may be one or a combination of a street and property realignment, and/or a modified traffic signal synchronization combined with directional and identity signage and crosswalk improvements.
- 3.4.2.4. Define corridor street tree canopy planting programs along major industrial area district corridors ("Boulevards"),** similar to what San Leandro has successfully implemented on East 14<sup>th</sup> Street, MacArthur Boulevard, and Davis Street from I-880 to downtown.

### **3.4.3. REGULATIONS**

- 3.4.3.1. Following General Plan updating of the vision for the workplace districts, take steps to introduce and prepare a form-based development regulations format.** This may be through a zoning overlay district. However, the most effective means will be through a coordinated district-based area planning process and document (a Specific Plan or a Precise or Area Plan, depending on the degree of infrastructure change necessary). In either case, a step-by-step community-based workshop process is strongly recommended to provide education on existing conditions, forces of change, economic and change potentials, and the physical format of desired development. This will provide the most reliable means of building stakeholder understanding and ownership for the vision and understanding of the tools and regulations to position the district to take advantage of forces of change, as the city did in the mid-20th Century.

As an example, potential technical steps in preparation of a form-based code could include:

- 3.4.3.1.1. Update the "vulnerability to change" map of opportunity sites,** (Fig. 18) to confirm the pattern of property development change potentials and where City actions and capital improvements may be focused for the strongest synergistic benefit.
- 3.4.3.1.2. Summarize supportive program actions and capital improvements to date.**
- 3.4.3.1.3. Update envisioned patterns of development and change** – such as areas of change and stability, activity anchors, corridors and centers, circulation, etc.
- 3.4.3.1.4. Establish boundaries of overlay district(s).**
- 3.4.3.1.5. Prepare illustrative site development graphics** – examples of how opportunity sites may ideally be developed to provide guidance of what the City and community is looking for.
- 3.4.3.1.6. Prepare illustrative building prototypes graphics** – examples of typical development with building massing, disposition, frontage orientation, general architectural character, etc., to provide guidance on what the City and community is looking for.
- 3.4.3.1.7. Prepare administrative draft form-based development regulations .**

**3.4.3.1.7.1. Define overall district structure/hierarchy and subdistrict zones**  
(boundaries).

- \_1.** Define pattern of activity/retail centers.
- \_2.** Define district zones - example:
  - \_2.1.** Core area (Merced Street/Westgate Parkway spine + Business Center properties) (Figs. 28 & 29).
  - \_2.2.** Major Corridors ("Boulevard" properties) (Figs. 14 & 16).
  - \_2.3.** Side streets and cul-de-sacs ("Back Street" properties) (Figs. 15 & 17).
- \_3.** Define permitted and conditional uses and exclusions by district zones.

**3.4.3.1.7.2. Define street corridor segments (boundaries).**

- \_1.** Assign orientation, facade composition, doorways & fenestration requirements, setbacks + controls, frontage types.
- \_2.** Exceptions.

**3.4.3.1.7.3. Define street and block structure.**

- \_1. Assign maximum block size and new street formation requirements.  
(Example, Fig. 37)
- \_2. Define required street and passage types, including vehicle, bicycle, and pedestrian facilities and street tree and street light locations in typical street sections.
- \_3. Define driveway access requirements, on street parking.

**3.4.3.1.7.4. Define on-site parking requirements.**

- \_1. Defined required parking types and criteria.

**3.4.3.1.7.5. Define open space and landscape requirements.**

**3.4.3.1.7.6. Define sign types and requirements (if required).**

**3.4.3.1.7.7. Organize user-oriented guide to regulations in graphic chart format by district zone** (i.e., a single 11x17 page chart for a go-to summary guide to all requirements to any property based on its district zone).

**3.4.3.1.7.8. Provide a section on architectural character guidance** based on place-specific district and architectural heritage (minimal guidance for workplace district). Use three-dimensional building prototype illustrations to provide visual guidance.

**3.4.3.1.8. Internal review.**

**3.4.3.1.9. Identify review procedures and resources.**

**3.4.3.1.10. Prepare public review draft documents.**

**3.4.3.1.11. Prepare environmental review.**

**3.4.3.1.12. Conduct hearings and adoption.**

## Next Steps: A Call to Action

Even without the "marketing moment" of Kaiser Hospital's opening and LitSanLeandro's advent, one direction of the Industrial Workplace Districts is to continue current trends of low activity, employment density and value-added being prevalent throughout a quarter of San Leandro's land area, with individual and disconnected advanced manufacturing businesses scattered among them and the lack of services, images and value keeping the profile of the district anonymous. The other possibility is to

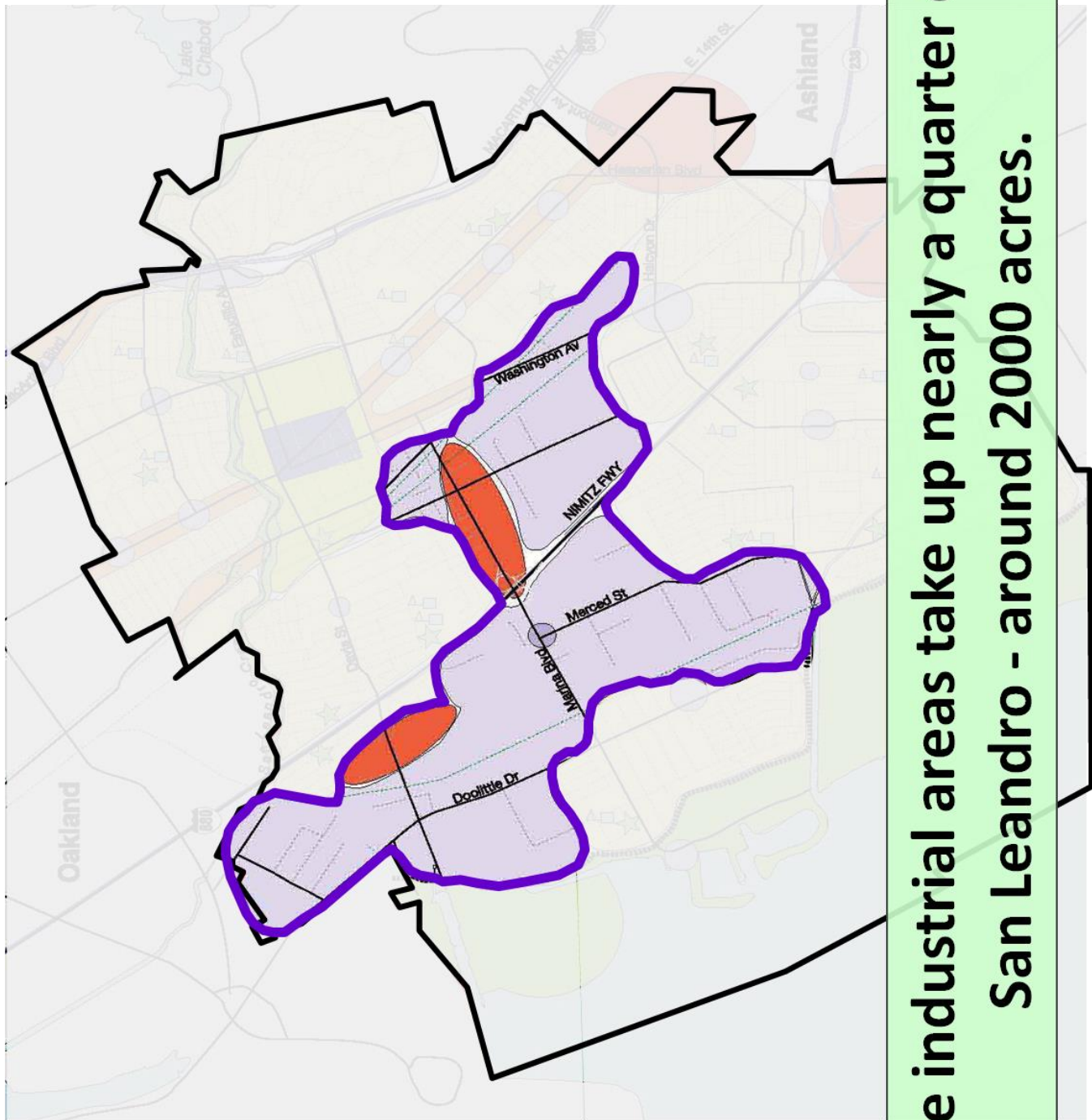
participate in the momentum of advanced manufacturing and innovation-driven businesses in the Bay Area and the United States, and use the moment to "re-up" the district's relevance to the city's prosperity, livability and image.

# List of Appendices - Figures and Tables

33	Figure 1	Diagram of the size of the industrial districts relative to the land area of the City.
34	Figure 2	Caterpillar Tractor Company in San Leandro (1935).
34	Figure 3	1,000,001st California Built Car by Chrysler Corporation - Dodge Plant (1950s).
35	Figure 4	1953 Aerial Photo and Inventory of Industrial Businesses in San Leandro.
36	Figure 5	Visitor Map from 1954 "Inside San Leandro" brochure.
37	Figure 6	Map of the Primary, Secondary and Tertiary Project Study Areas.
38	Figure 7	Map of Building Footprints.
39	Figure 8	Map of Buildings (by parcel) - Year Built.
40	Figure 9	Map of Development Density by Parcel and Floor Area Ratio (F.A.R.).
41	Figure 10	Map of Ownership Size Increments (ranges).
42	Figure 11	Map of Employment Density and General Pattern of Value-Added Companies.
43	Figure 12	Map of Major Arterial Streets and Traffic Volumes.
44	Figure 13	Map of Workplace Districts Street Network.
45	Figure 14	Map of "Boulevards": Major Through-Routes (including truck routes).
46	Figure 15	Map of "Back Streets": Local & Cul-de-Sac Streets.
47	Figure 16	"Boulevards": Larger Buildings & Sites.
48	Figure 17	"Back Streets": Smaller Buildings & Sites - Incubation & Flexibility.
49	Figure 18	Map of Vulnerability to Change (addresses the Primary Study Area only).
54	Figure 19	Over 60% of built space in the industrial districts is for storage and distribution uses.
55	Figure 20	Rear of the Kellogg Plant today - the inaccessible interior of a superblock.
56	Figure 21	The streets are not appealing for walking or bicycling.



57	Figure 22	Food, business & mobility services in Emeryville's workplace districts.
58	Figure 23	Food, business & mobility services in San Leandro's workplace districts.
59	Figure 24	The Three Primary Clusters (Plus "Other") of Value-Added Companies Today.
60	Figure 25	The (Scattered) Geographic Distribution of Cluster Businesses Today.
61	Figure 26	Three Advanced Clusters - Food, Processes & Controls, & Metals and Machining.
62	Figure 27	A San Leandro-grown example of advanced manufacturing - INX Digital.
63	Figure 28	The Spine Concept for the Merced Street/Westlake Parkway Corridor.
64	Figure 29	Concept for a Focal Business Center for the Workplace Districts.
65	Figure 30	What's in a Business Center?
66	Figure 31	In the Near Term, Create Food Pods.
67	Figure 32	Learn from Local Precedents of "Temporary" and "Tactical" Retail.
68	Figure 33	Seed the Back Streets - with Low Cost, "Humanizing" Place Improvements.
69	Figure 34	Industrial District Pedestrian Lighting Retrofit Concept.
70	Figure 35	Increase Bikeability.
71	Figure 36	Promote and Reward Good Design.
72	Figure 37	Map of a Potential Long-Term Infill Block and Street Pattern.
73	Table 1	Industrial Supply and Vacancy Rates for the East Bay and San Leandro.
74	Table 2	Number and Percent of Employees in Different Industries Within the Study Areas.
75	Table 3	Characteristics of Employees in San Leandro's Industrial Areas.
76	Table 4	Individual Listings of Vacant Industrial Space in San Leandro.
78	Table 5	Property Characteristics.



**The industrial areas take up nearly a quarter of  
San Leandro - around 2000 acres.**

Figure 1. Diagram of the size of the industrial districts relative to the land area of the City.

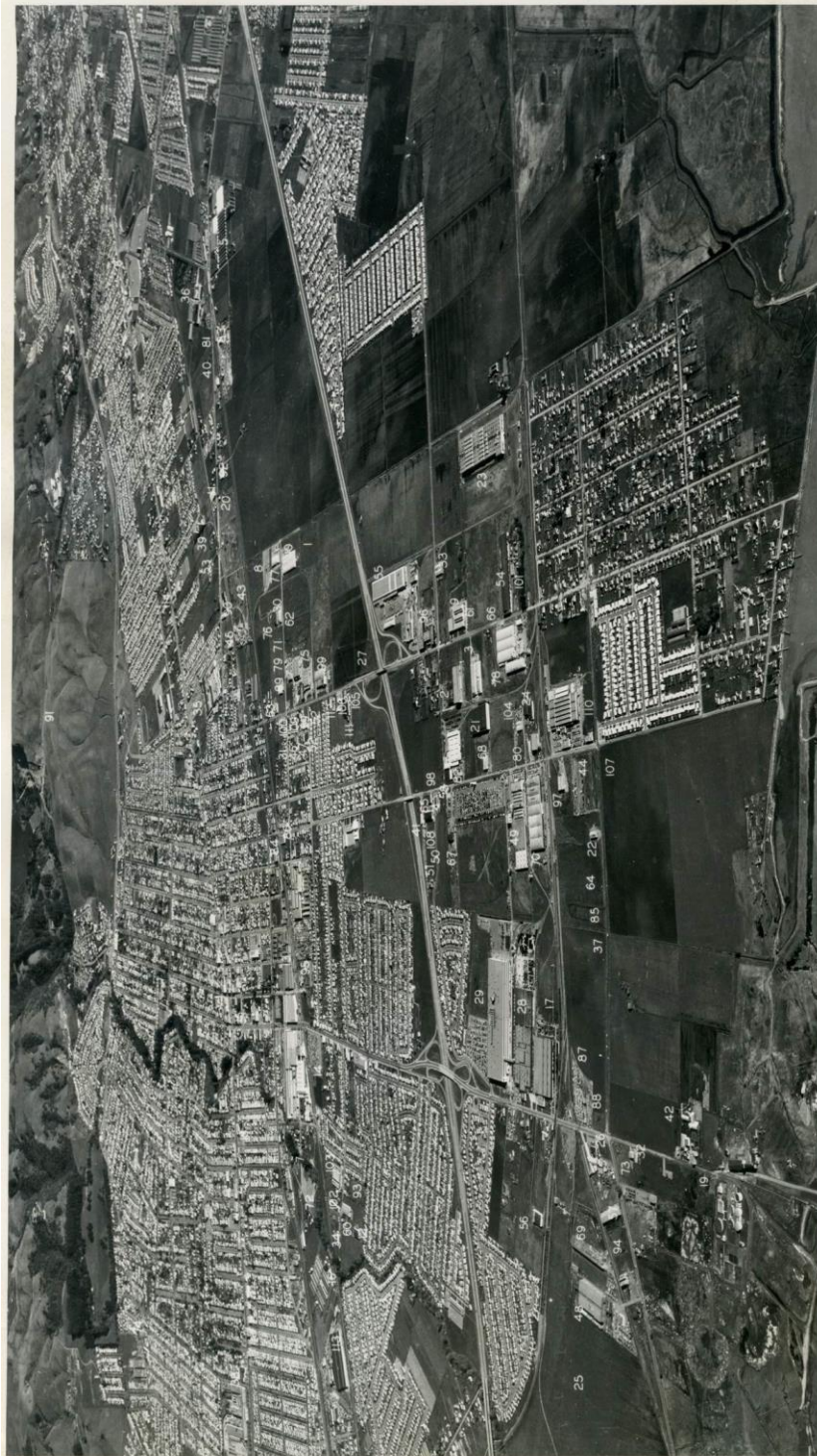


Figure 2. Caterpillar Tractor Company in San Leandro (1935).



Figure 3. 1,000,001st California Built Car by Chrysler Corporation - Dodge Plant (today's Westgate Center) (1950s).





— SAN LEANDRO INDUSTRIES —      © 1953 by R. L. COPELAND —

1 ALADDIN HEATING - SITE	48 KAISER MFG.	71 PACIFIC TEL. & TEL.	94 SPEEDMASTER ENGINEERING
2 AMERICAN BLOWER	49 KELLOGG	72 PAXTON TRUCK	95 ST. REGIS PAPER
3 ANDRE PAPER BOX	50 LAUREL PLUMBING - SITE	73 PAXTON WATER WHEEL	96 ST. REGIS PAPER
4 AUTOMATIC SPRINKLERS	51 LE BRUN INDUSTRIAL TRACT	74 PETERBILT TRUCKS	97 SUPERIOR CONCRETE
5 AVALON-MORTENSEN NURSERY	10 SITES SOLD	75 PETERSON TRACTOR	98 TAY - HOLBROOK - SITE
6 B & W PAINT MFG.	52 LIVELY MFG.	76 PETTIT PAINT	99 TEA GARDEN PRODUCTS
7 BARMATIC PRODUCTS	53 LUCAS NURSERY	77 PILLAR FURNITURE	100 THOR TOOL & DIE
8 BEST CONCRETE	54 LLOYD FRY ROOFING	78 PIONEER FLINTKOTE	101 TRUMBULL ASPHALT
9 BRENNAN - HARTSHORN	55 LUCY STORES	79 POLLARD FRANK L. CO.	102 UMPHRED'S
10 BUDGET PAINTS	56 LUKES & ROBBINS	80 PETERSON SITE	103 UNITED ENGINE & MACHINE
11 BUDGET PAINTS	57 MCKESSOR & ROBBINS	81 RENA SITE	104 UNIVERSAL FORM CLAMP
12 C & S FURNITURE	58 MERIT MACHINE	82 REPUBLIC SUPPLY	105 WEBB PAINTING
13 CALIFORNIA-PACKING CORP.	59 MODEL MFG.	83 RHODES - JAMESON	106 WEBB PAINTING
14 CATERBELL-TRACTOR	60 MODERNAR	84 RIDGE FOUNDRY	107 WESTERN ELECTRIC & P.T. & T. - SITE
15 CENTRAL BUSINESS DISTRICT	61 MONADOCK MILLS	85 RIDGE FOUNDRY	108 WESTERN MOLDED PRODUCTS
16 CHERRY CITY NURSERY	62 MONTAGUE STOVE	86 RODDISCRAFT	109 WESTERN SEALANT
17 CHRYSLER-MOTOR-PARTS	63 NAHM CO. SPENCER	87 ROBERTSON TRUCK-A-WAYS	110 WESTERN WAXED PAPER
18 CITY HALL & CHAMBER OF COMMERCE	64 NATIONAL CYLINDER GAS - SITE	88 ROBERTSON TRUCK-A-WAYS	111 WORKMAN PACKING
19 CITY SEWAGE PLANT	65 OAKLAND PLUMBING	89 ROT-LOCK PUNCH	112 WELLS MFG. SPRING & WIRE
20 CONSOLIDATED ENGINEERING	66 OAKLAND PLUMBING - SITE	90 ROT-LOCK PUNCH	113 WELLS MFG. SPRING & WIRE
21 CONTINENTAL CAN	67 O.K. TRUCKING	91 SAN LEANDRO ROCK CO.	114 PADDY-O-CHROME FURNITURE
22 CROWN-PAINT	68 OLIN TOOL & DIE	92 SECURITY PARACHUTE	
23 CROWN-ZELLERBACH	69 OSBORNE ENGINEERING	93 SPECIAL EQUIPMENT	
	70 PACIFIC CAN		

Figure 4. 1953 Aerial Photo and Inventory of Industrial Businesses in San Leandro, by R.L. Copeland. A majority of the firms listed appear to be manufacturing firms of various products, serving local and regional markets. The location of the largest plants are generally served by freight rail spurs. Source: [http://www.alamedainfo.com/San\\_Leandro\\_California\\_Industries\\_1953.jpg](http://www.alamedainfo.com/San_Leandro_California_Industries_1953.jpg)



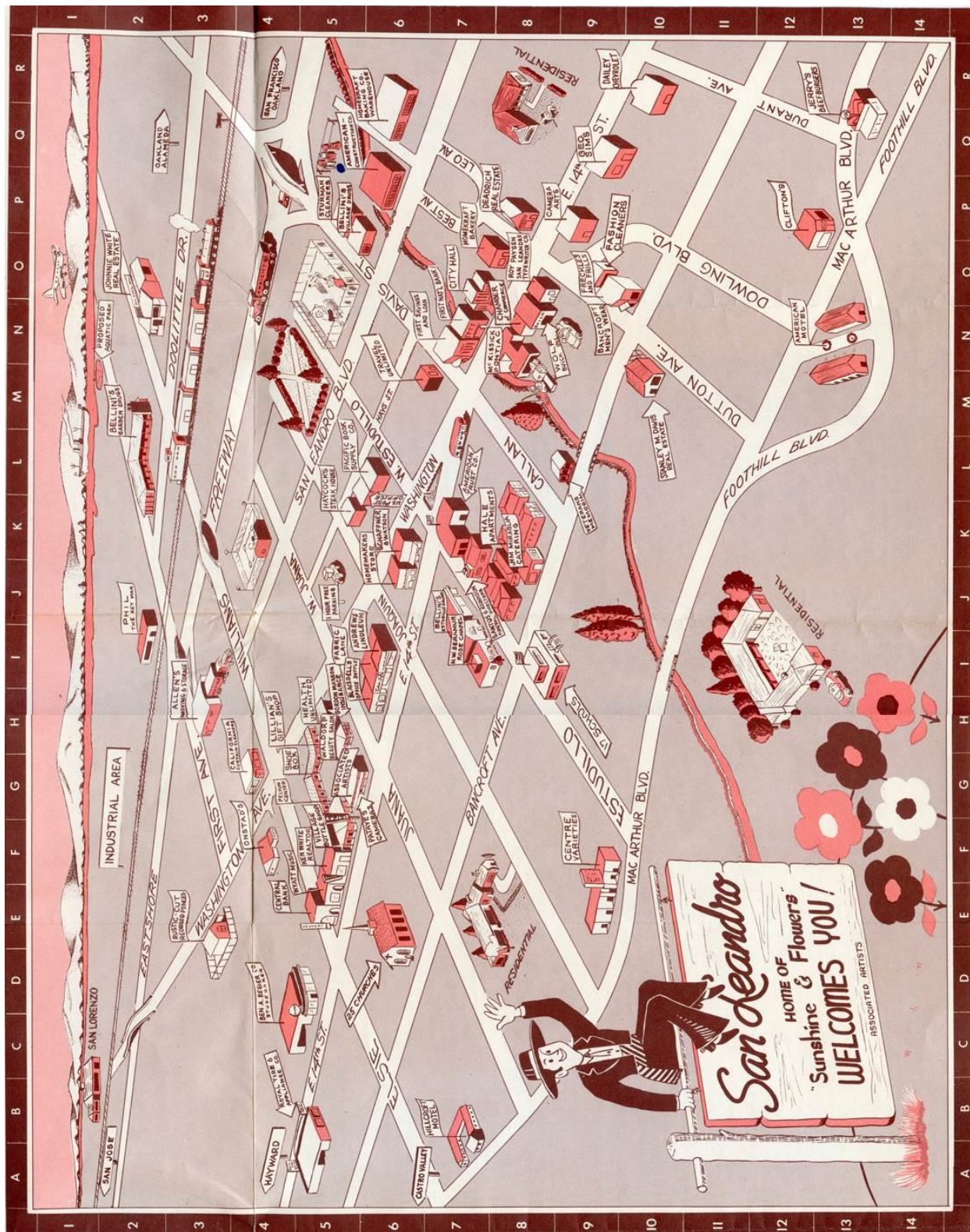


Figure 5. Visitor Map from 1954 "Inside San Leandro" brochure. The "Industrial Area" is shown at the top, a kind of undefined place at a distant location on the other side of the Eastshore Freeway. This "divide" from most of San Leandro and the isolation of the industrial areas persists today. Source: [http://www.alamedainfo.com/Inside\\_San\\_Leandro\\_Map\\_1954.jpg](http://www.alamedainfo.com/Inside_San_Leandro_Map_1954.jpg)



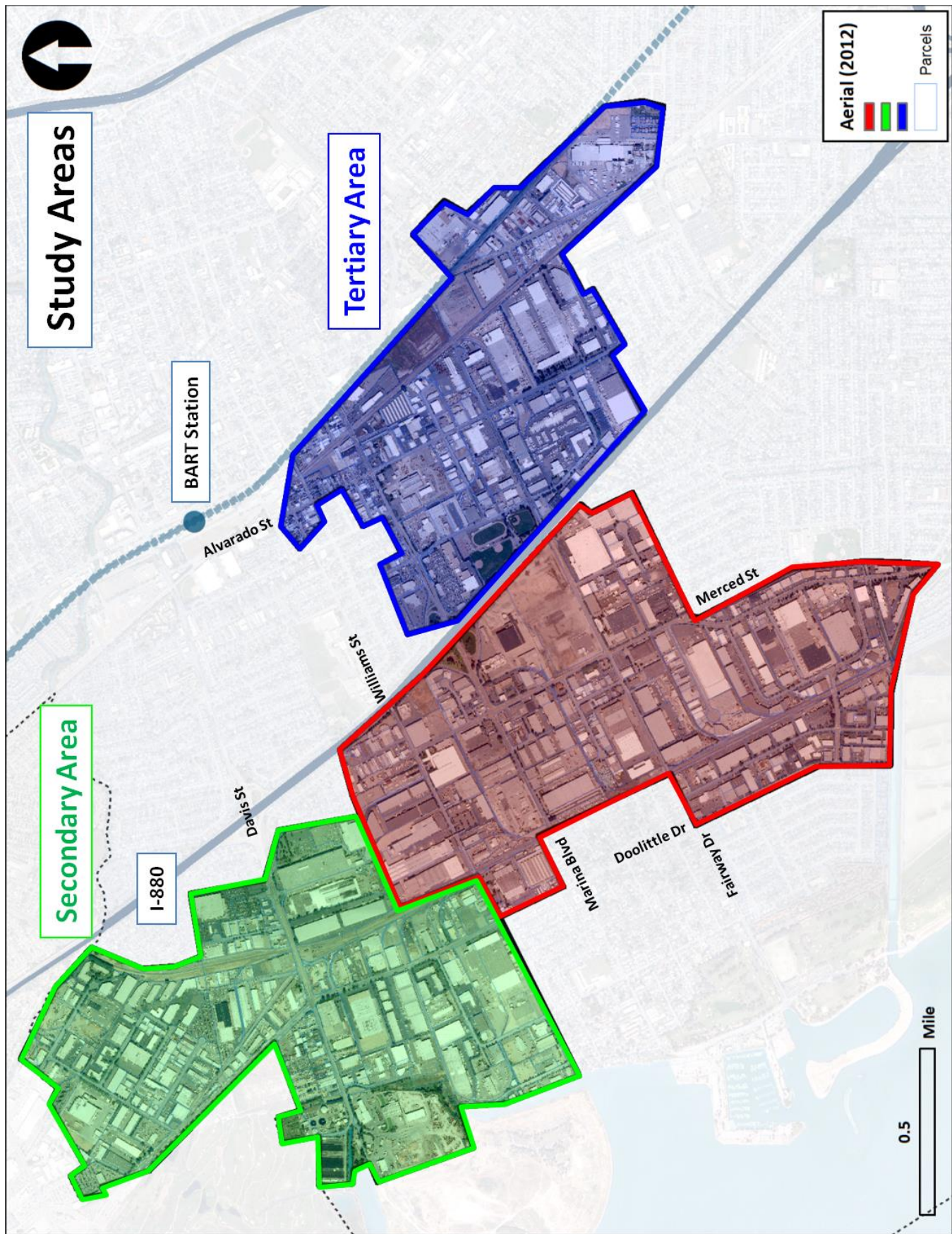


Figure 6. Map of the Primary, Secondary and Tertiary Project Study Areas within the Industrial Districts, outlined atop a 2012 aerial photo. Though the overall analysis work for this project addresses all three areas, only the Primary Area was analyzed in detail relative to issues such as Vulnerability to Change (see Fig. 18 and following notes).



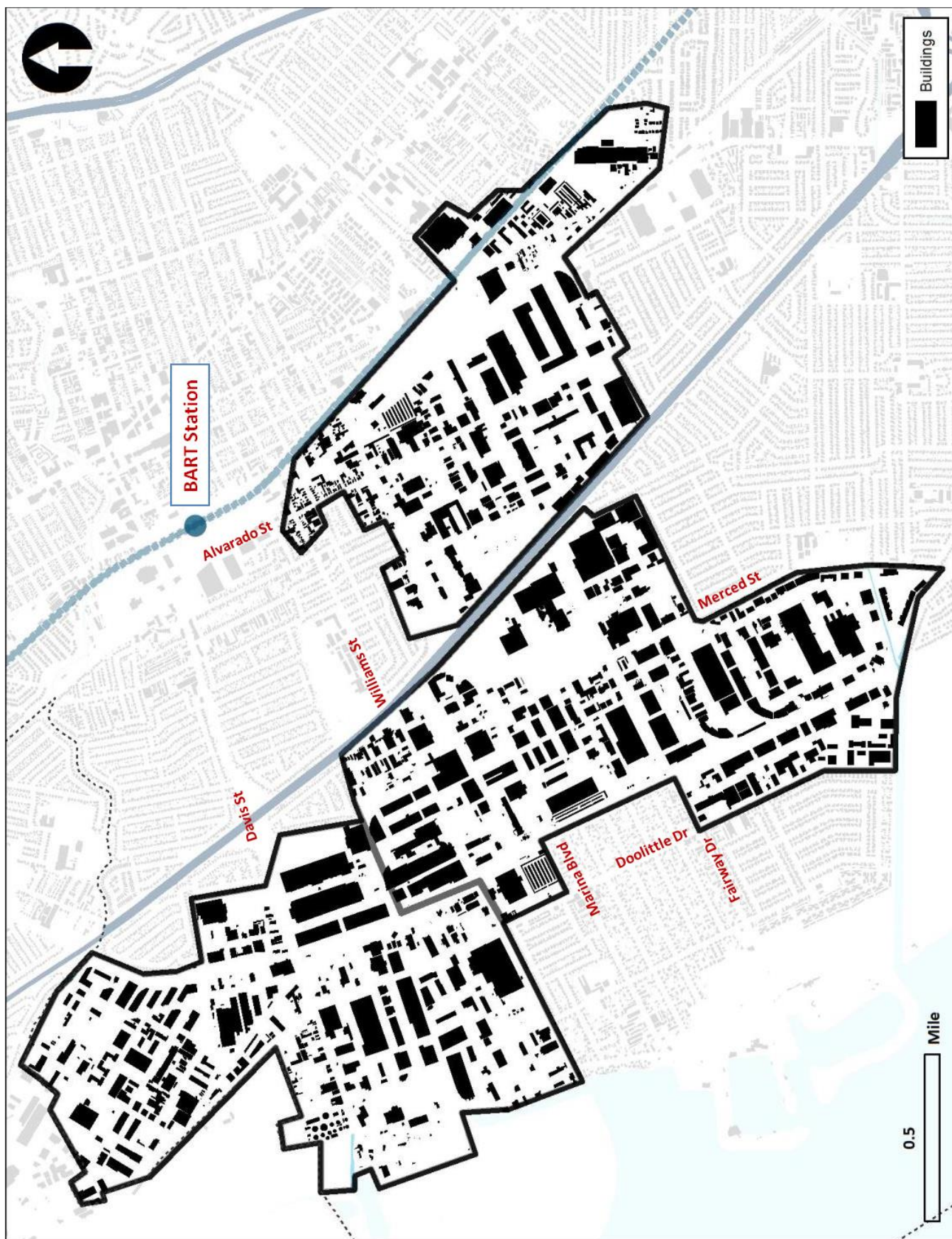


Figure 7. Map of Building Footprints. Note the variety of building footprint scales, and the contrast with surrounding neighborhoods.



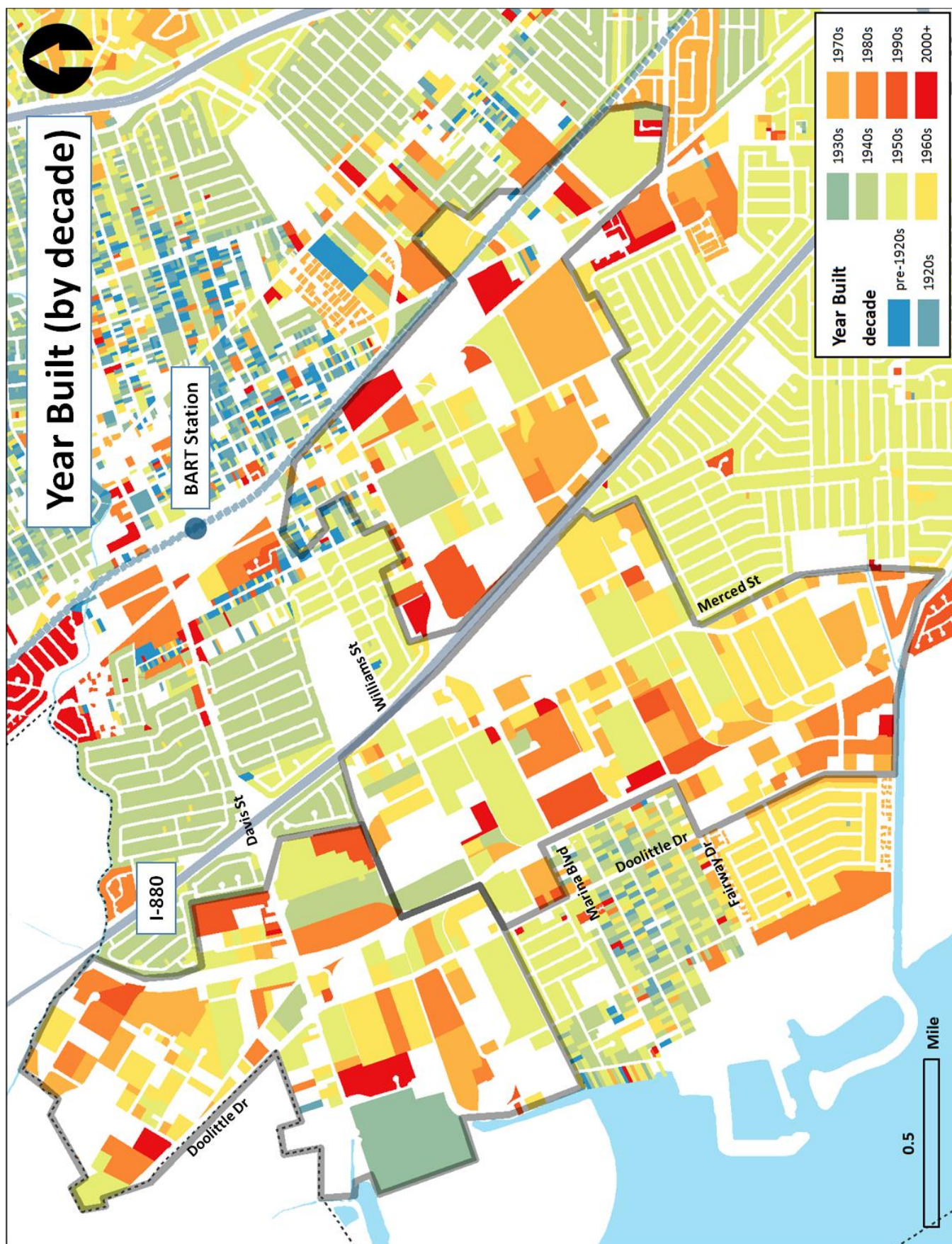


Figure 8. Map of Buildings (by parcel) - Year Built.



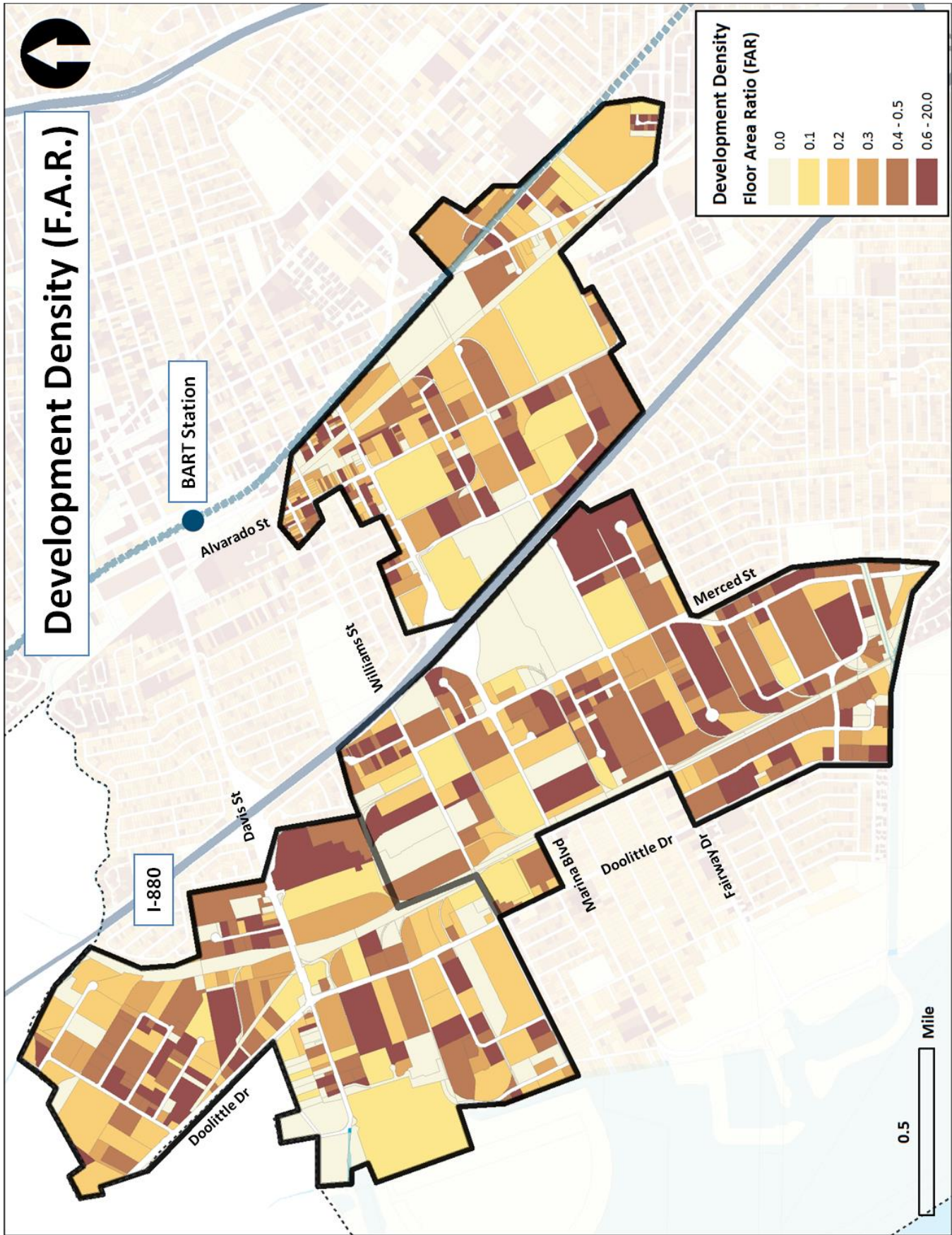


Figure 9. Map of Development Density (by Parcel and Floor Area Ratio (F.A.R.)).

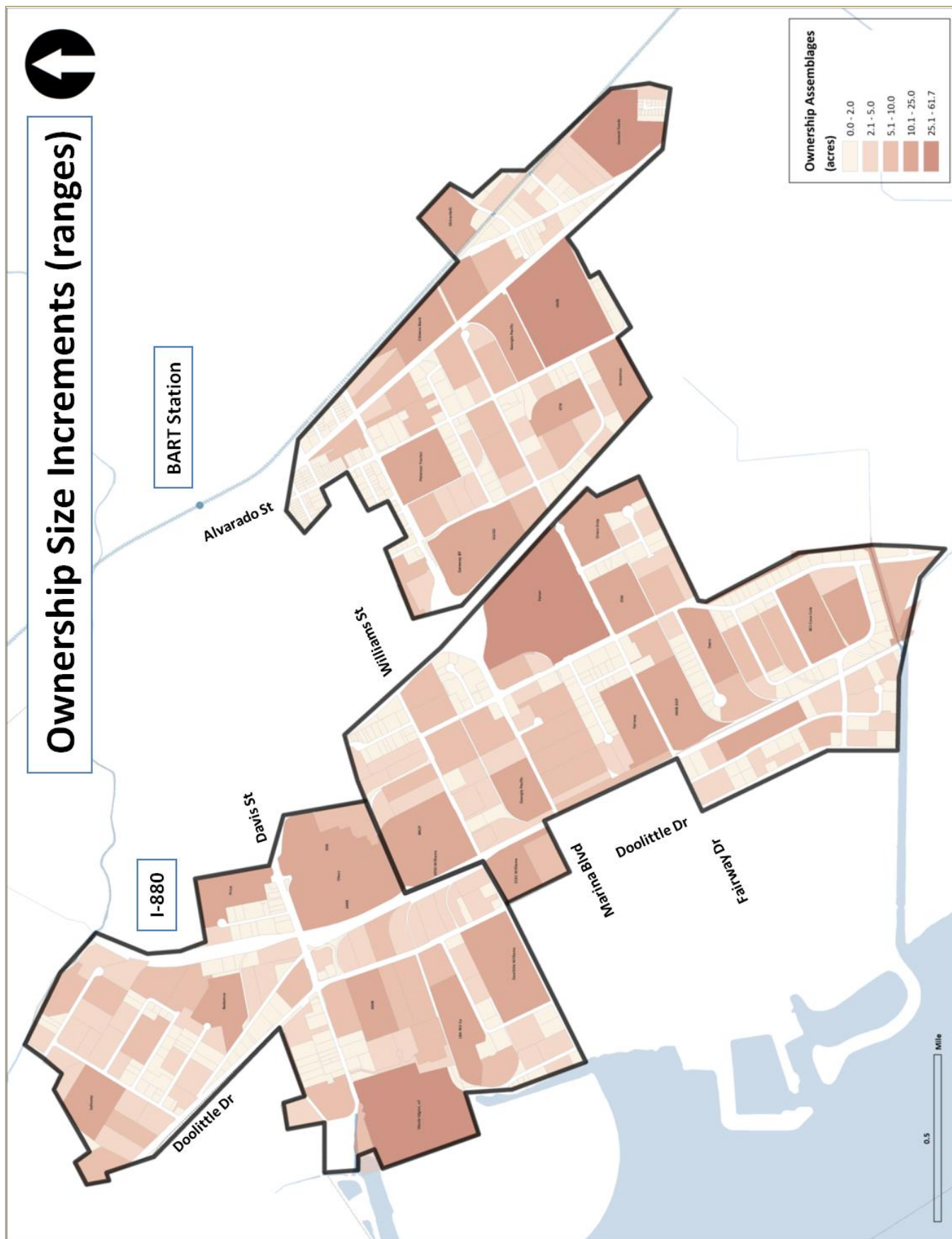


Figure 10. Map of Ownership Size Increments (ranges).



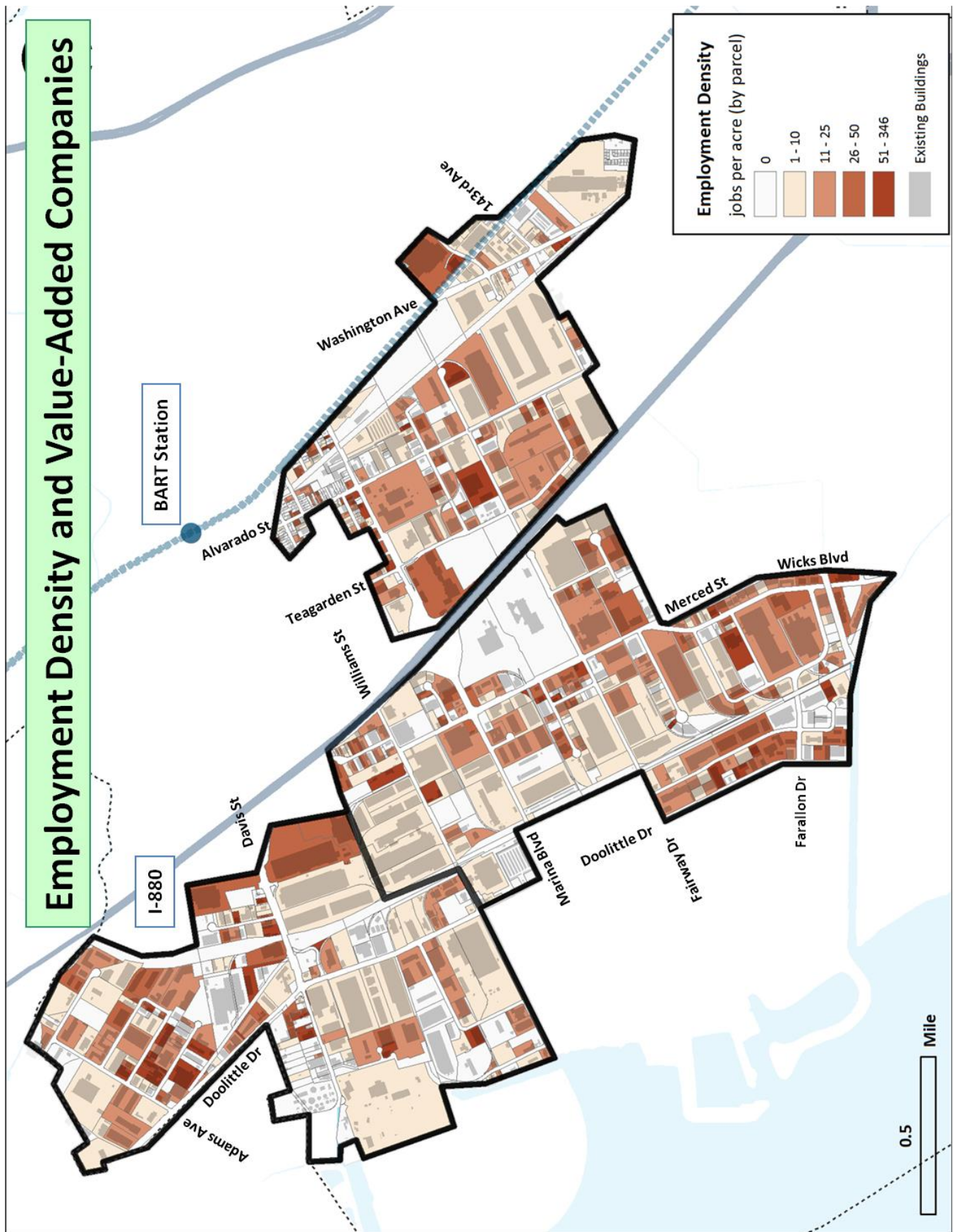


Figure 1.1. Map of Employment Density and General Pattern of Value-Added Companies.

# Major Streets and Current ADT's

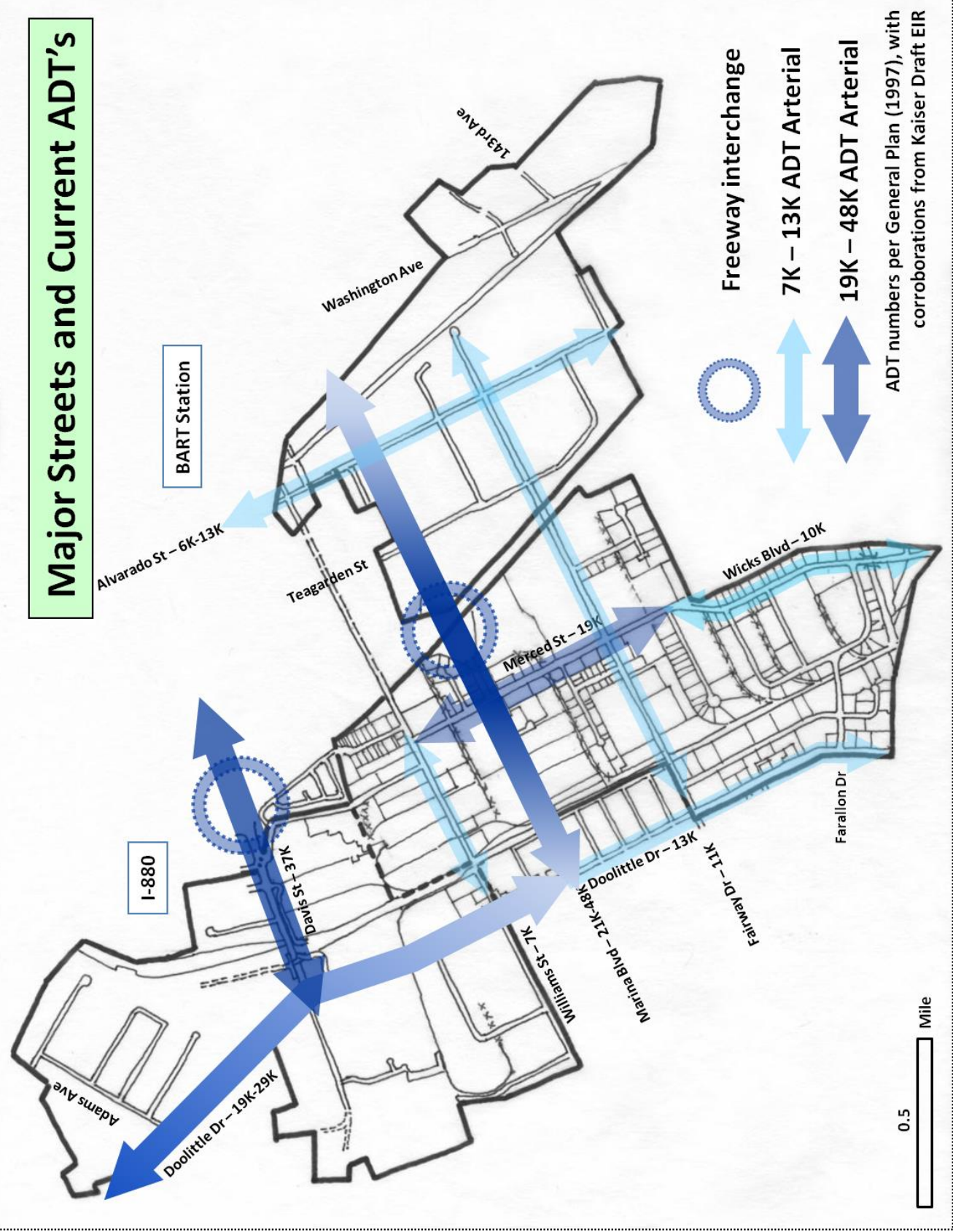


Figure 12. Map of Major Arterial Streets and Current Traffic Volumes (Average Daily Trips - ADT's).



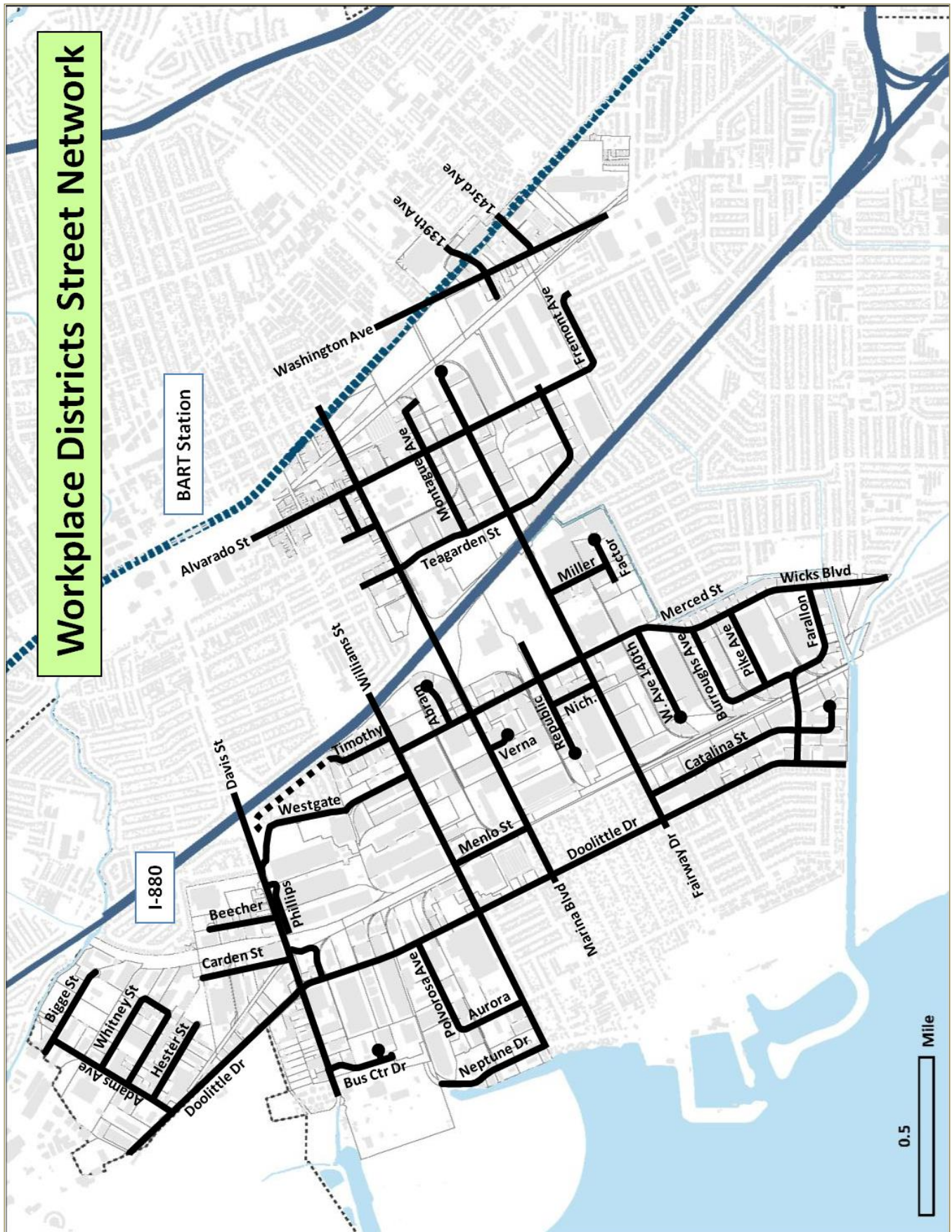


Figure 13. Map of Workplace Districts Street Network. The large "Superblock" pattern can result in a "walk around the block" extending up to two miles.



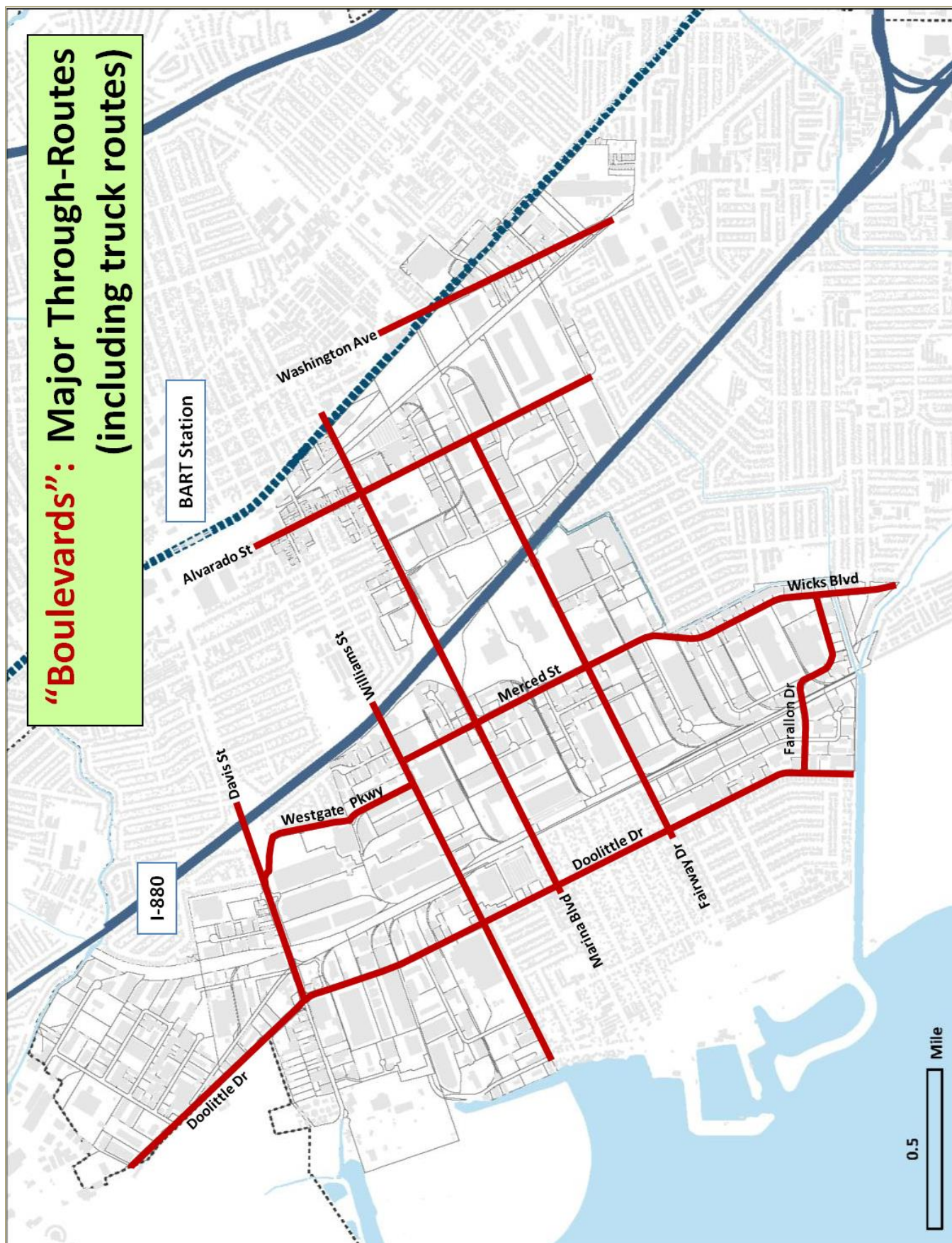


Figure 14. Map of "Boulevards": Major Through-Routes (including truck routes).



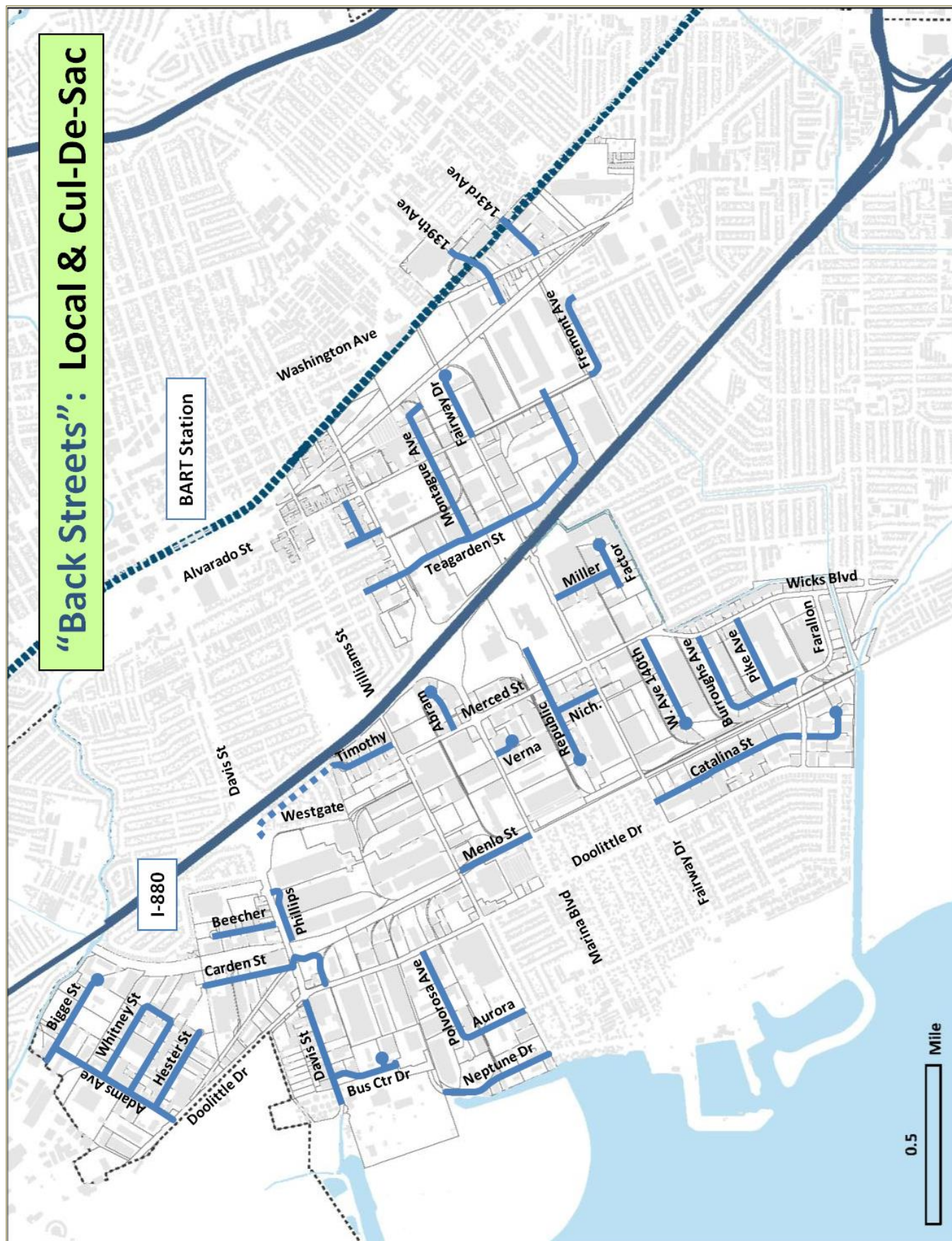
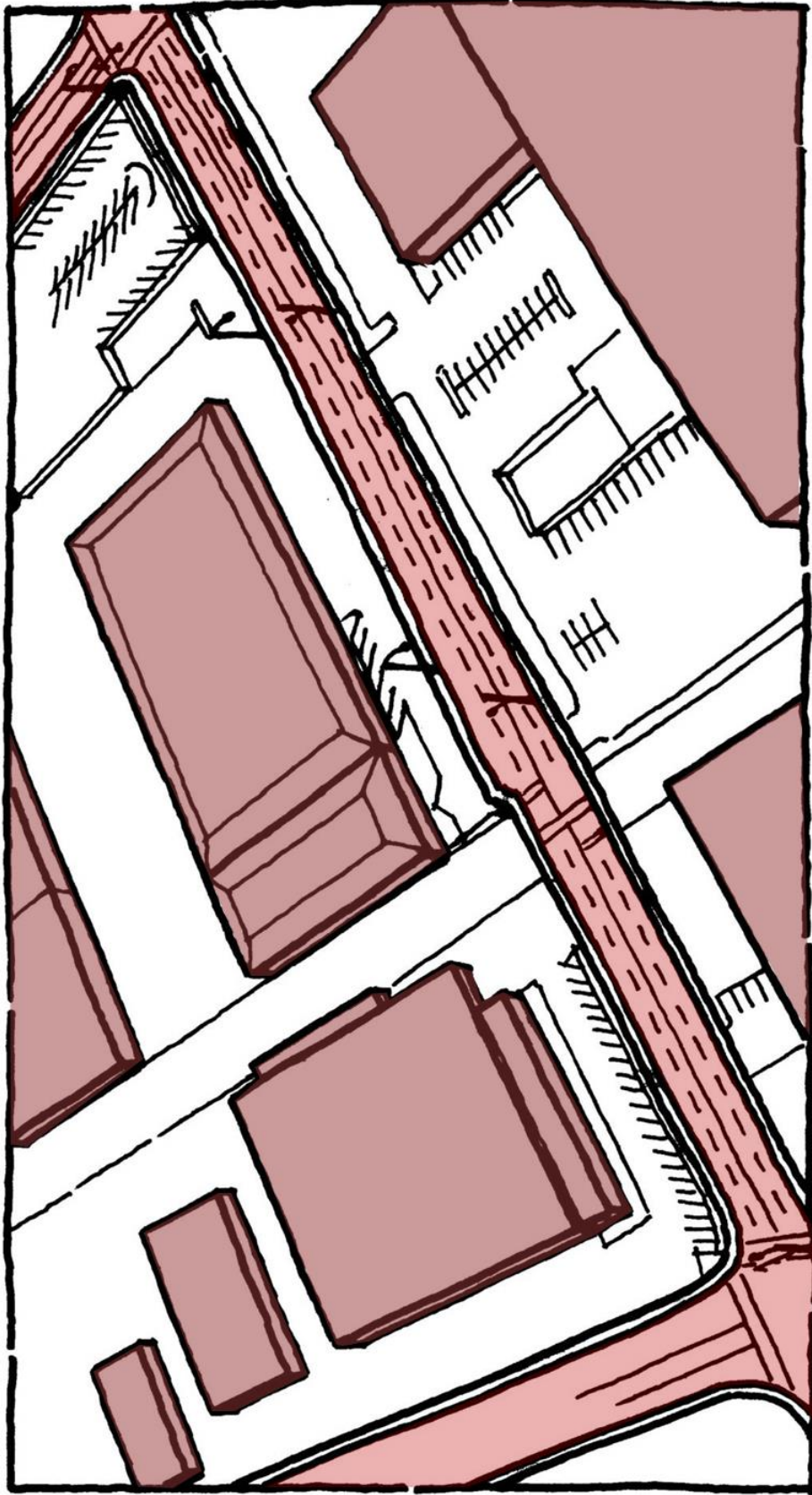


Figure 15. Map of "Back Streets": Local & Cul-de-Sac Streets.

**“Boulevards”**: Major Through-Routes

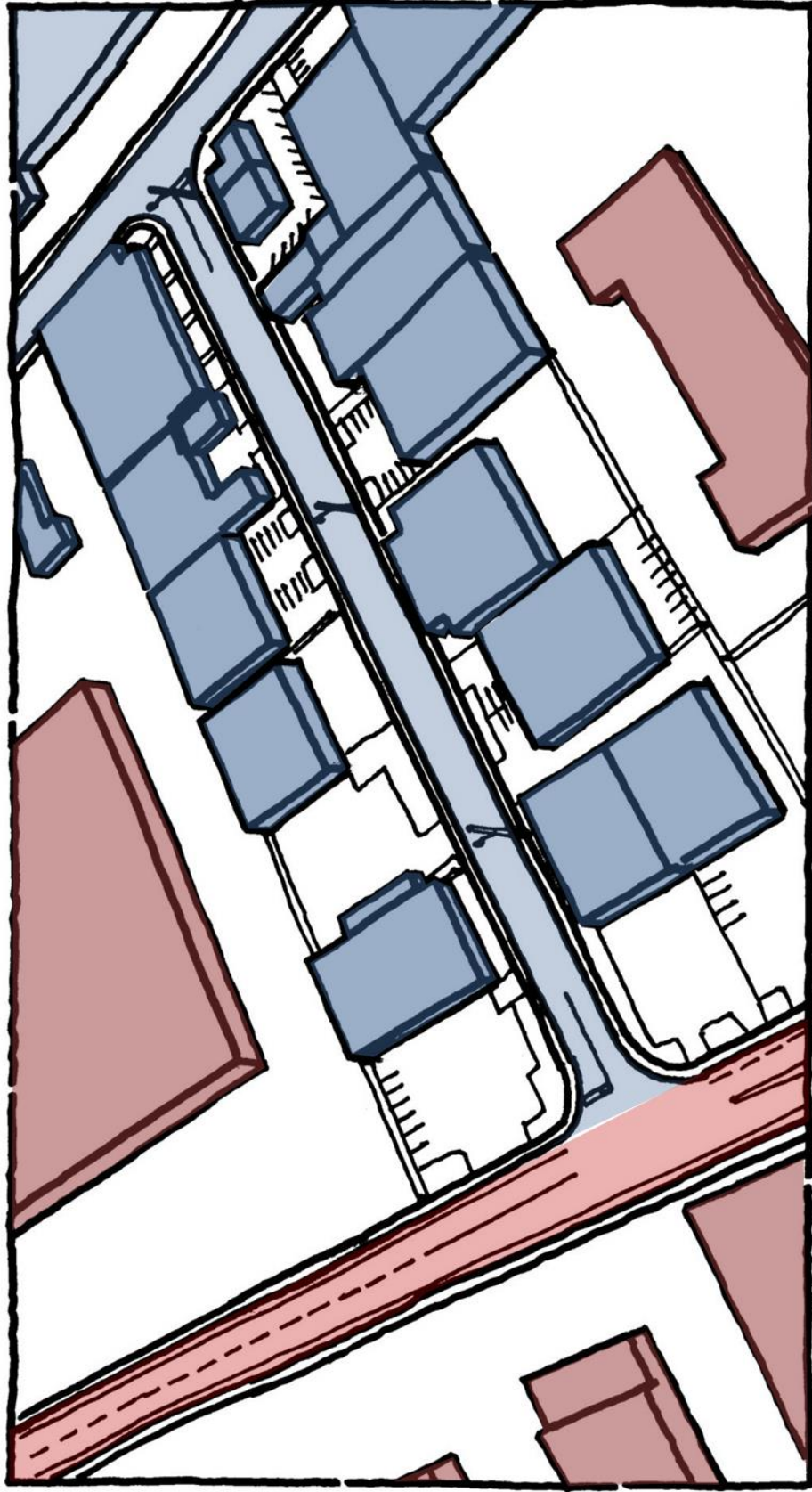


## Larger Buildings & Sites

Figure 16. "Boulevards" street corridors carry greater through-traffic, truck routes, and bus lines, and in general are fronted on by larger parcels and buildings.



**“Back Streets”: Local & Cul-De-Sac**



## **Smaller Buildings & Sites – Incubation & Flexibility**

Figure 17. "Back Streets" are local and cul-de-sac streets carrying less traffic generally moving at slower speeds, and often have smaller parcels and buildings.

## Vulnerability to Change

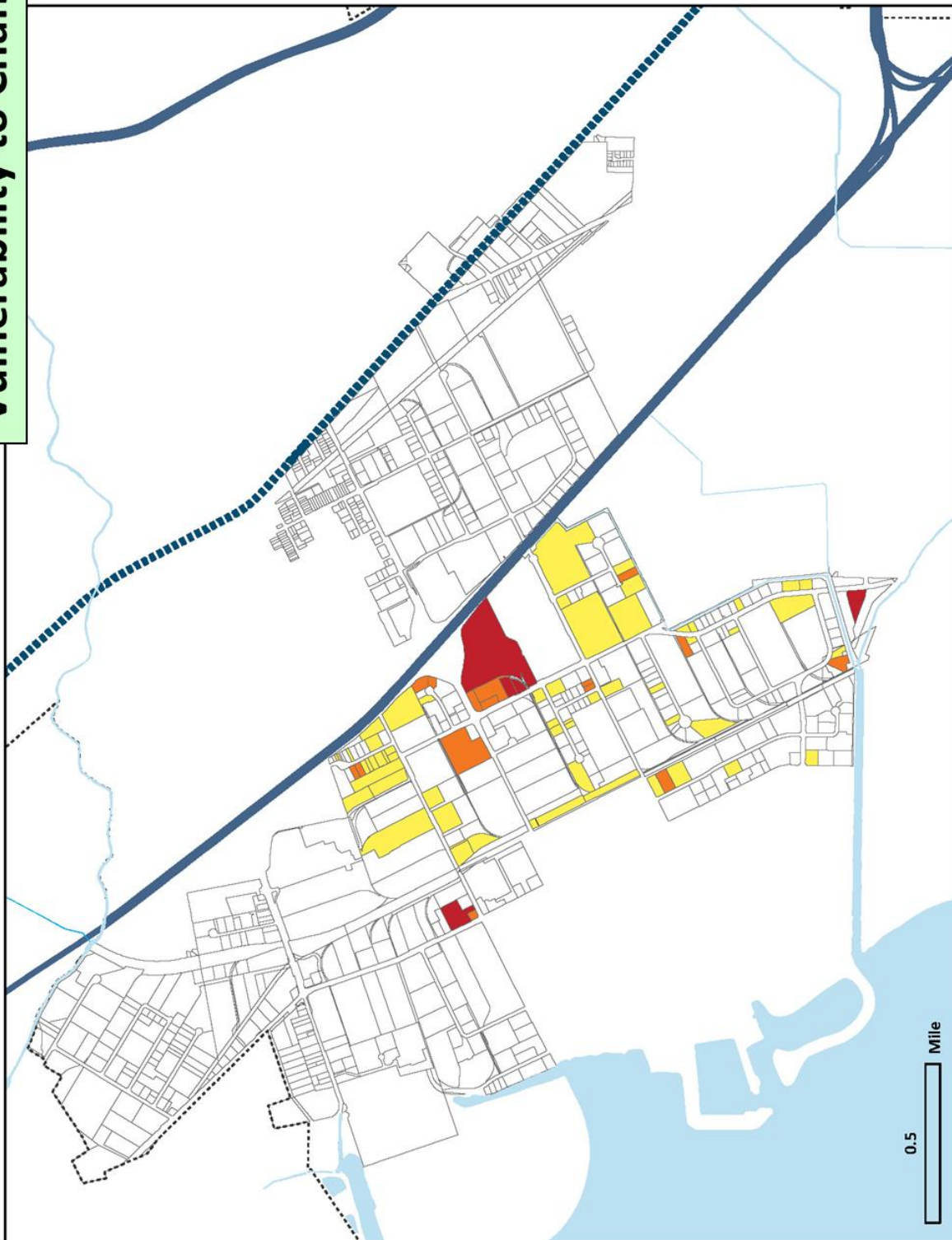


Figure 18. Map of Vulnerability to Change (addresses the Primary Study Area only). See following text for description and discussion.

## List of parcels designated on the Vulnerability to Change Map

The Vulnerability to Change Map is a tool used to help recognize geographical patterns of properties that may have greater or lesser propensity to change from an urban (re)development perspective. Such patterns can help to guide the development of “broad-brush” district revitalization strategies. Patterns of vulnerability can also guide where public investments in capital improvements or programs may have the strongest catalytic effect on future private property developments or redevelopments – as well as where gradations of regulatory differences (regarding height, setback, orientation, etc.) could be meaningful. Vulnerability is indicated by **color** as being high, moderate, or long-term.

We estimate vulnerability by visually assessing sites for building coverage (i.e. the amount, size and kind of structures on the property), land use condition, and apparent ratio of improvements to land value. Some market factors are taken into account in a relative sense within the district, such as factoring site proximity to highway interchanges vs. those that are remote and hard to get to. We do not take into account the intentions or contractual factors of owners or tenants (nor is that information consistently available), nor do we try to “drill down” to invisible things like environmental contamination that might impede development. Nonetheless, the intent is not to achieve specific status accuracy for a particular parcel; it’s rather to see broad patterns such as clusters or concentrations of parcel vulnerability, especially in relation to district assets such as activity generators, transportation access points, etc.

A parcel indicated as **high vulnerability** (shown in red ●) indicates there is little or nothing to be demolished in order to develop the site with new buildings and improvements. The existing ratio of improvements to land value is thus low. The assumed timeframe of potential change would be immediate to within one to two years.

A parcel classified as **moderate vulnerability** (shown in orange ●) indicates that on-site buildings or structures are vacant, are of obsolescent condition/format, and/or show relatively low coverage and value. The site may be underutilized as well. Alternatively, some moderately vulnerable sites may have well-tenanted buildings in good repair that would not be vulnerable in other locations, but due to proximity to larger and more highly vulnerable sites as well as their own high access and visibility location, they may be subject to greater vulnerability to change than otherwise. The assumed timeframe of change would be between two and four years.

A parcel designated with **long-term vulnerability** (shown in yellow ●) indicates that a combination of low site coverage, older or underutilized building conditions, and vacancy or a current non-temporary tenant means a longer term possibility of development change that may occur on the site. The assumed timeframe of change would be more than four years. *Note: industrial district parcels often support a transportation, vehicle repair or construction yard-related use activity with low building coverage. Parcels of this type may also be designated with long-term vulnerability. This reflects no assumption or beliefs about the intentions or longevity of these businesses – it simply notes that if the business tenant or owner at some point makes a decision that closes or relocates the operation from the parcel, the site has few apparent physical impediments to its re-development.*

Parcels that are shown in white are assumed to not have an apparent vulnerability to change or development.

The following list of parcels occurs entirely within the “Primary Area” of the Next Generation Workplace Districts Study with two exceptions (1622-1708-1772 Doolittle Drive and 1750 Doolittle Drive). It was compiled and evaluated as of August 2013. Due to the quickening pace of real estate transactions taking place in the area at this time, it may be that as of mid-September 2013, sites that were indicated as appearing to exhibit vulnerability to change may have since undergone a sale, lease, or a re-development initiative, effectively altering or removing it from such consideration.

One parcel per line is listed, by address; a number of assembled parcels have multiple street addresses. Parcels are listed approximately from north to south in location.

● **HIGH VULNERABILITY PARCELS**

1622-1708-1772 Doolittle Drive

2424-2428-2500 Merced Street / 1701 Marina Blvd. (Kaiser North parcel)

15002 Wicks Blvd. (triangular parcel)

● **MODERATE VULNERABILITY PARCELS**

1750 Doolittle Drive (Hummus Heaven)

1761/1763 Timothy Drive

1767 Timothy Drive

1900-1944 Marina Blvd. (former Cal-Neva Supply Co., Inc. and current Volvo Construction Equipment)

1605-1613 Abram Court

1650, 1654, 1658, 1662, 1666, 1670 Abram Court

1803 Merced Street (Denny's)

1899 Merced Street (Wells Fargo)

1821, 1827, 2300 2306, 2334, 2336, 2344, 2400-2406, 2410 Merced Street (Office park complex)

1903, 1911, 1915, 1917 Fairway Drive

1925, 1929 Fairway / 2674, 2678 Nicholson Street

14275 Wicks Blvd

13750 Catalina Street

1660-1668 Factor Avenue

2050 Farallon Street

● **LONG TERM VULNERABILITY PARCELS**

2040 Williams Street (Kellogg building)

No known numerical address, Westgate Parkway (Walmart employee parking lot) *Note – though the lot is tied to the function of the Walmart store, it is a site that has no structures on it and has few barriers to development in the long term; thus its long term vulnerability has a longer timeline than 5 years.*

1944, 1946, 1947, 1948 Williams Street (MV Transportation Lot) - *Similar comments as for the Walmart employee lot.*

1900, 1904, 1906, 1910 Williams Street - *Similar comments as for the Walmart employee parking lot.*

1688 Timothy Drive  
 1700 Timothy Drive  
 1740 Timothy Drive  
 1786, 1796, 1798 Timothy Drive  
 1767 Timothy Drive  
 1771 Timothy Drive  
 1773 Timothy Drive  
 1775, 1777 Timothy Drive  
 1785, 1785 1, 2, 4, 5 Timothy Drive  
 1800 Williams Street  
 1815 Williams Street - *this parcel has a completely unbuilt rear half, away from the Williams Street frontage building.*  
 1850 Williams Street  
 1890 Williams Street  
 1929, 1933 Williams Street  
 2001 Williams Street  
 2091, 2095 Williams Street  
 2075 Williams Street  
 1665, 1695 Abram Court  
 2525 Merced Street  
 1906-1910 Republic Avenue  
 1933-1941 Republic Avenue  
 1946 Republic Avenue  
 1947 Republic Avenue  
 1995, 1999 Republic Avenue  
 1700, 1776, 1788 Fairway Drive + 2800 Miller Street + 1401 Factor Avenue (*noted as under purchase discussions by KTR Capital Partners in August 2013*)  
 2725 Miller Street  
 1850, 1880 Fairway Drive + 2700, 2800 Merced Street  
 1600 Factor Avenue  
 (Unbuilt lot at west end of Factor Avenue serving as parking lot for Saag, may be part of 1799 Factor Avenue)  
 1945 Fairway Drive  
 13300-13498 Menlo Street  
 13500-13698 Menlo Street  
 2048, 2116 Fairway Drive + 13700 Catalina Street  
 13880, 13992 Catalina Street  
 14183 Catalina Street  
 1981 West Avenue 140<sup>th</sup>  
 2065 West Avenue 140<sup>th</sup>  
 2091 West Avenue 140<sup>th</sup>  
 14270-14278 Wicks Blvd  
 14295-14299 Wicks Blvd  
 14300-14306 Wicks Blvd

1997, 1999 Pike Avenue

14622-14630 Wicks Blvd

14775 Wicks Blvd - *Similar comments as for the Walmart employee lot.*

14760, 14764, 14772, 14780, 14796, 14798 Wicks Blvd

14820-14826 Wicks Blvd

14500, 14570 Doolittle Drive + 2160, 2188 Farallon Drive

2040, 2046 Farallon Drive



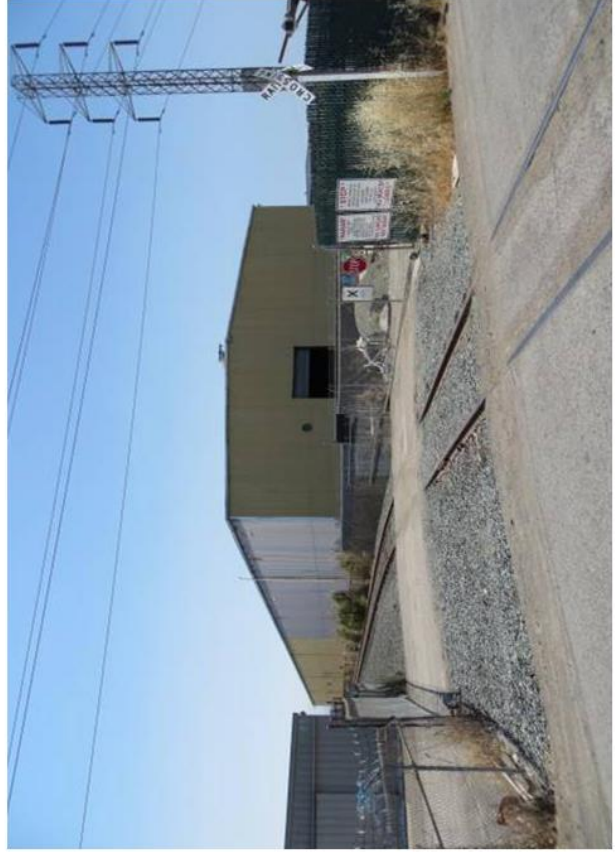


Figure 19. Today, over 60% of built space in the industrial districts is for storage and distribution uses.



Figure 20. A View of the rear of the Kellogg Plant today - the inaccessible interior of a superblock.



# The streets are not appealing for walking or biking.



Figure 21. The "Legacy" streets in the industrial workplace districts today are not appealing for walking or bicycling.

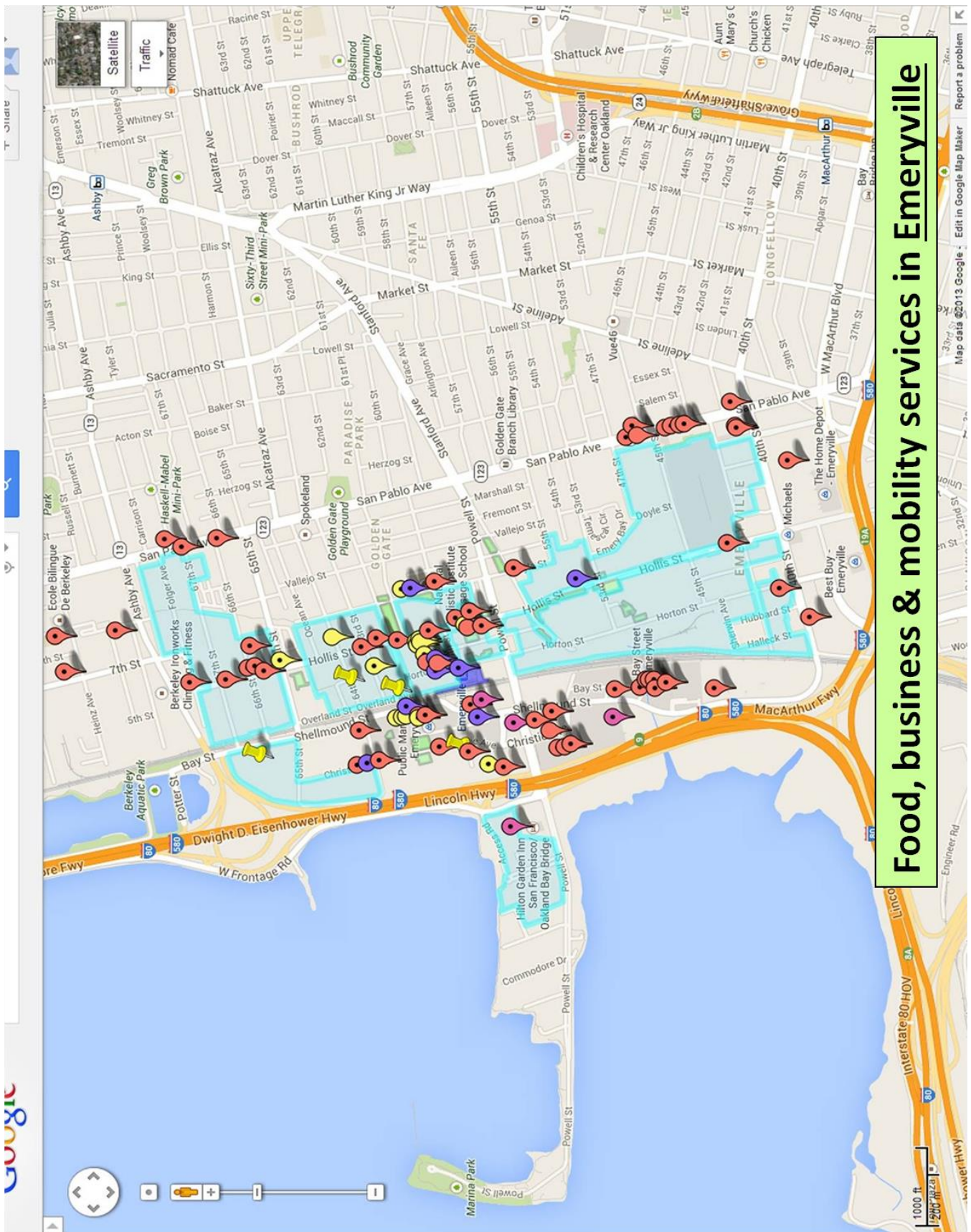


Figure 22. Food, business & mobility services in Emeryville's workplace districts. Eating places are in red, business services in yellow, and mobility services in blue.



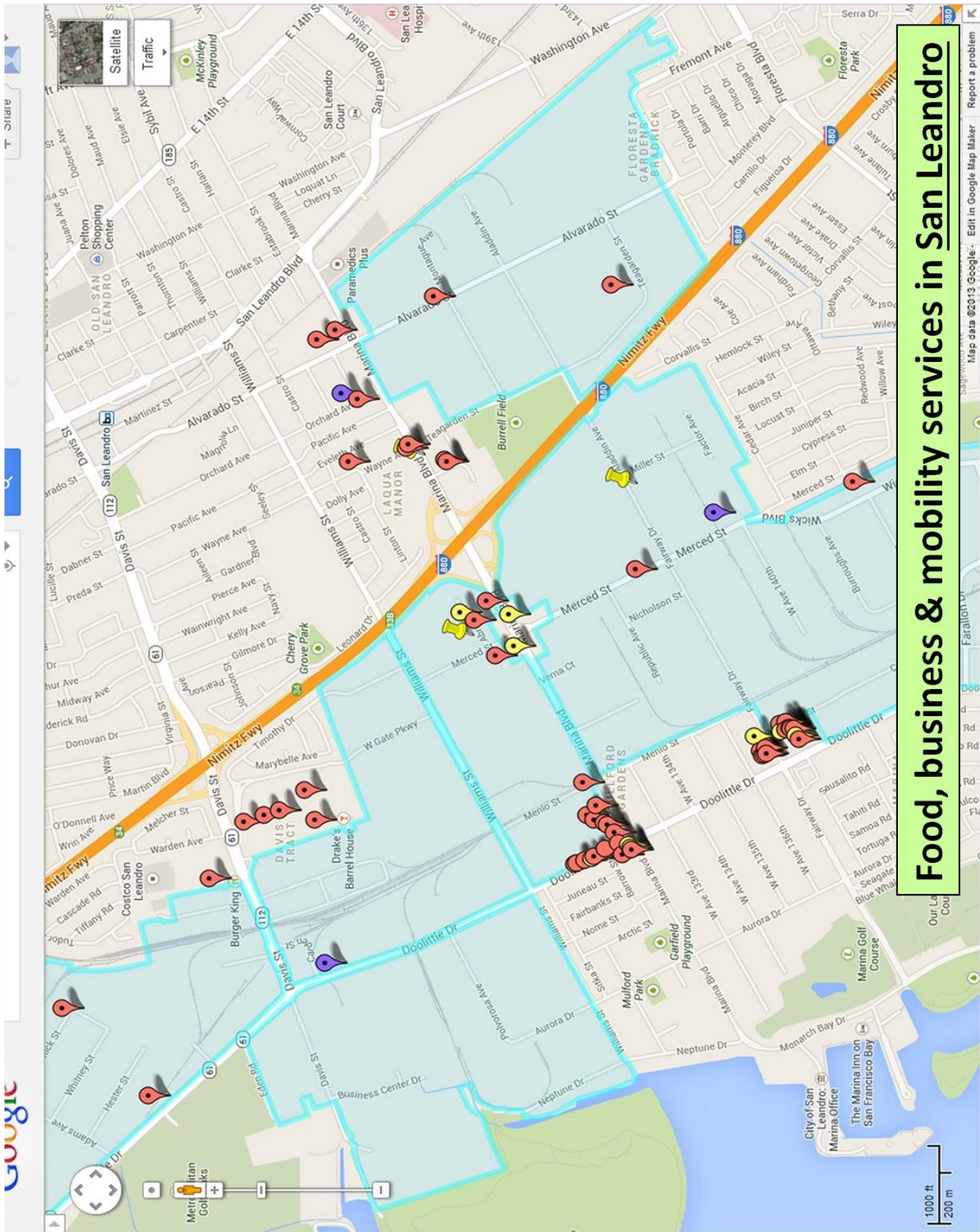


Figure 23. Food, business & mobility services in San Leandro's workplace districts - the map is at the same scale (and with same colors) as the preceding page.

# Various Value-Added Companies

San Leandro has a long industrial history, first in making plows and Caterpillar tractors, then in canning, and then in making Chrysler vehicles. This created a legacy of skills in metals and machining, food processing and distribution, and instruments and process controls. The logos below show some of the companies operating in these and other fields.

## Food:



## Metals and Machining:



## Instruments and Process Control:



## Other, Including Plastics and Power:



Figure 24. The Three Primary Clusters (Plus "Other") of Value-Added Companies Today in the industrial workplace districts.





Figure 25. The (Scattered) Geographic Distribution of Cluster Businesses in the Industrial Workplace Districts Today.



Figure 26. Three Advanced Clusters - Food, Processes & Controls, & Metals and Machining - and representative firms from each one.



# A case in point

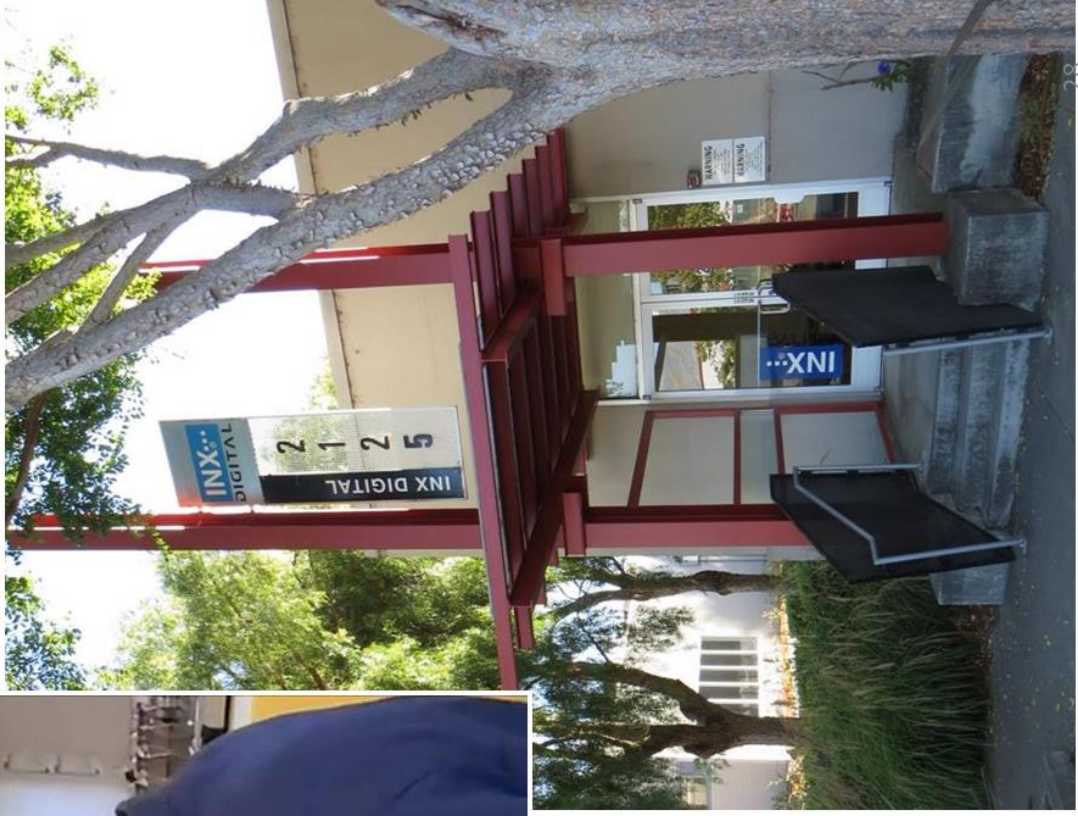


Figure 27. A San Leandro-grown example of advanced manufacturing - INX Digital.

## Spine Concept: "Connect the Dots"

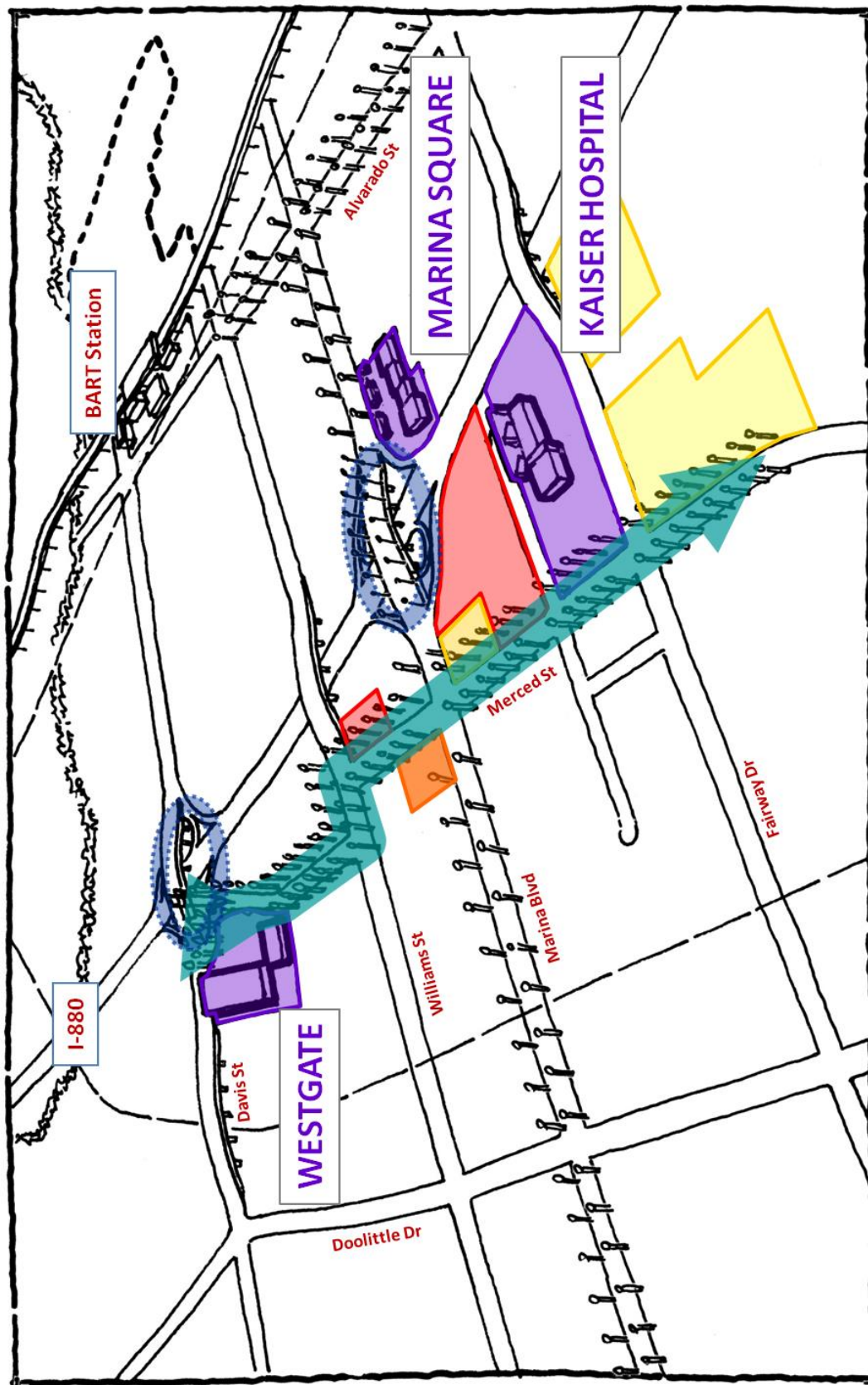


Figure 28. The Spine Concept identifies its using streetscape enhancements and connecting of north and south Activity Anchors (Westgate Center and Kaiser Hospital) as well as a proposed Business Center at the Kaiser North retail site, the Marina Blvd. and Davis St. I-880 interchanges, and several opportunity sites.



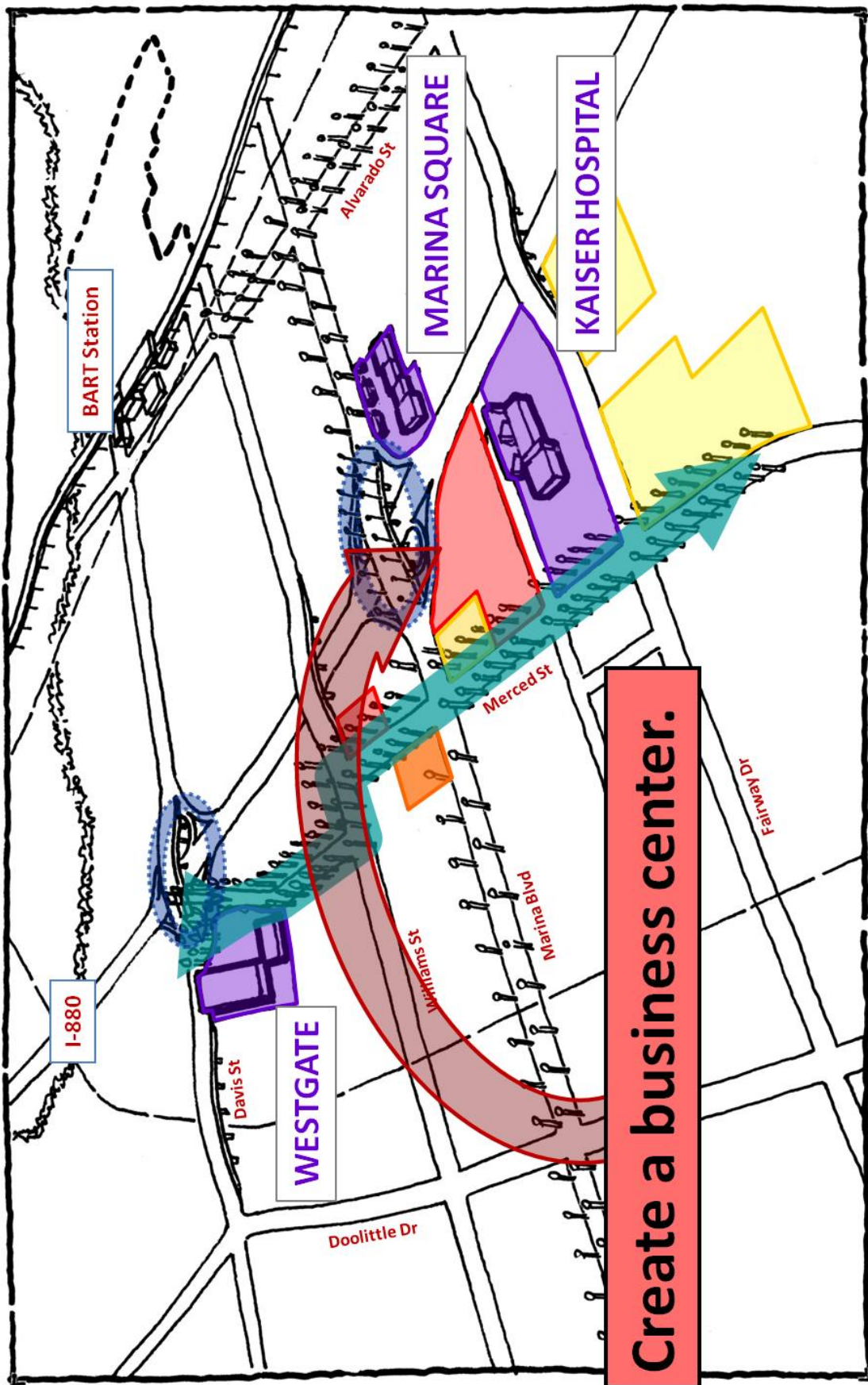


Figure 29. The Kaiser North retail site is the most central and accessible location for a business center to serve the entire district, in conjunction with the Spine Concept. It would ideally create a walkable luster of restaurants, lodging, business and personal services, after work social venues, and upper floor office and workspaces. Such a center would add long-term value to the workplace districts. A temporary "Food Pod" could activate the site in anticipation of its future role.

# What's in a business center?



Kinko's and Starbucks.



Deal making.  
"Let's do lunch."



Outside,  
away.



Transit, anything but  
being stuck in traffic.



Faces & beer.



A definable center.



Services, the  
human touch.

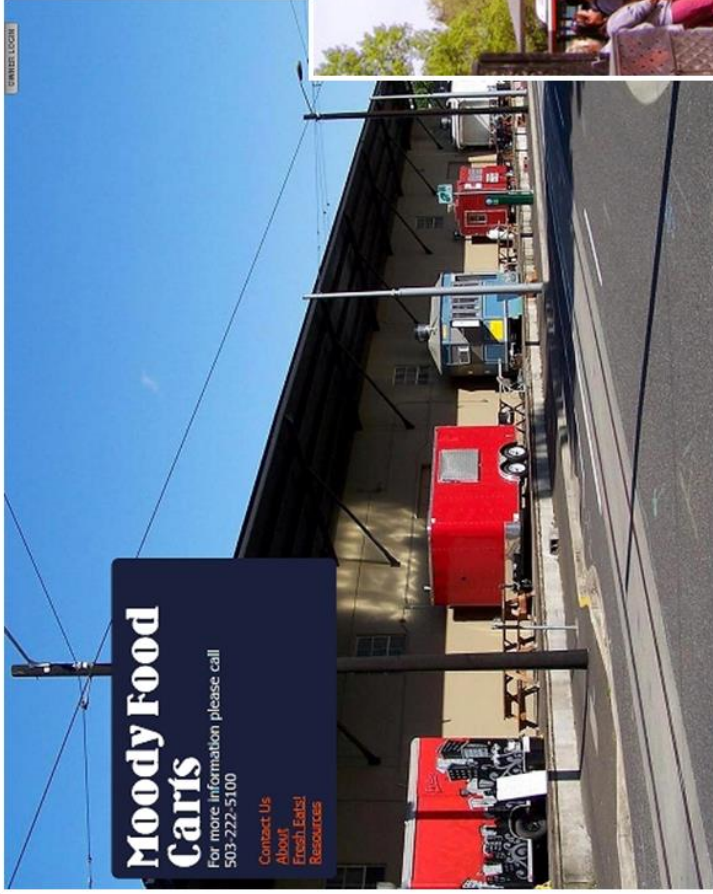


A good night's rest.

Figure 30. Summary of desirable features and services in a Business Center. Also included would be upper-story offices, co-work spaces, etc..



# Create food pods (\$/\$\$)



Portland, OR



Philadelphia

Figure 31. In the Near Term, Create Food Pods.

# Learn from local precedents



Example: **Proxy Development** on City land at Octavia Blvd. in SF

Figure 32. There are great local, regional and West Coast Precedents of "Temporary Retail" and "Tactical Urbanism" to learn from.



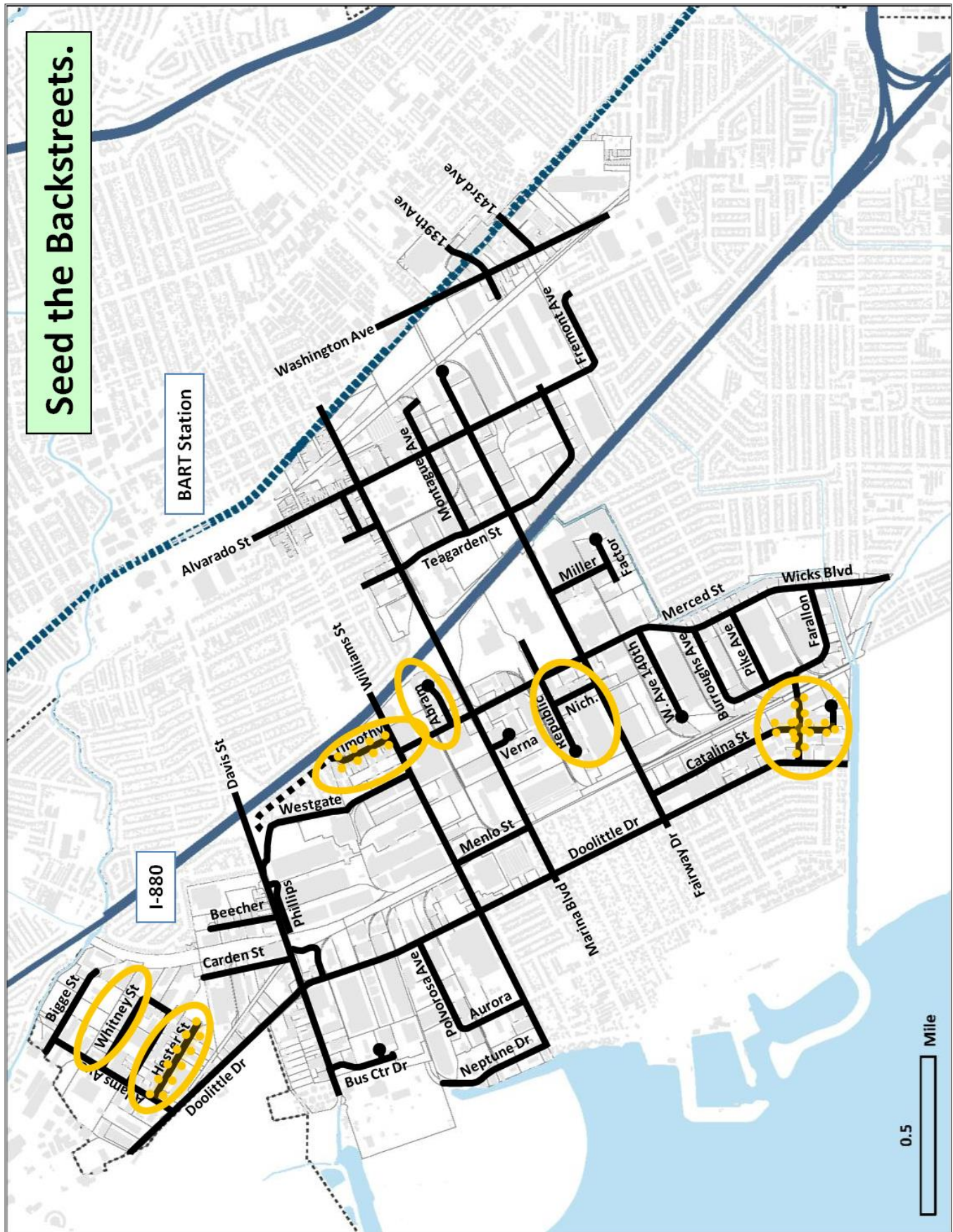


Figure 33. In addition to a Business Center and Spine focus, "Backstreet" locations are targeted for small-scale improvements to humanize the place and encourage investment.

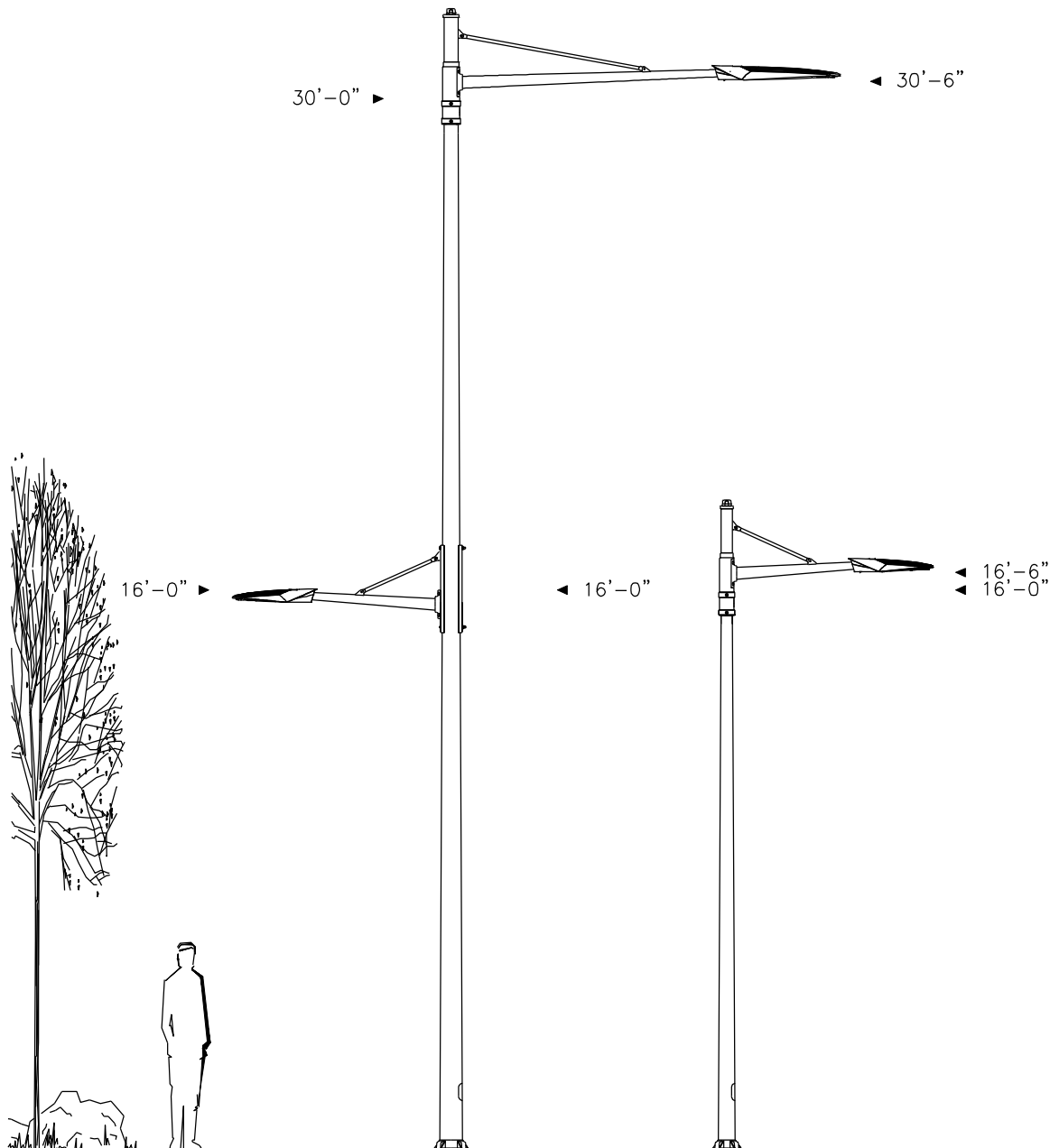
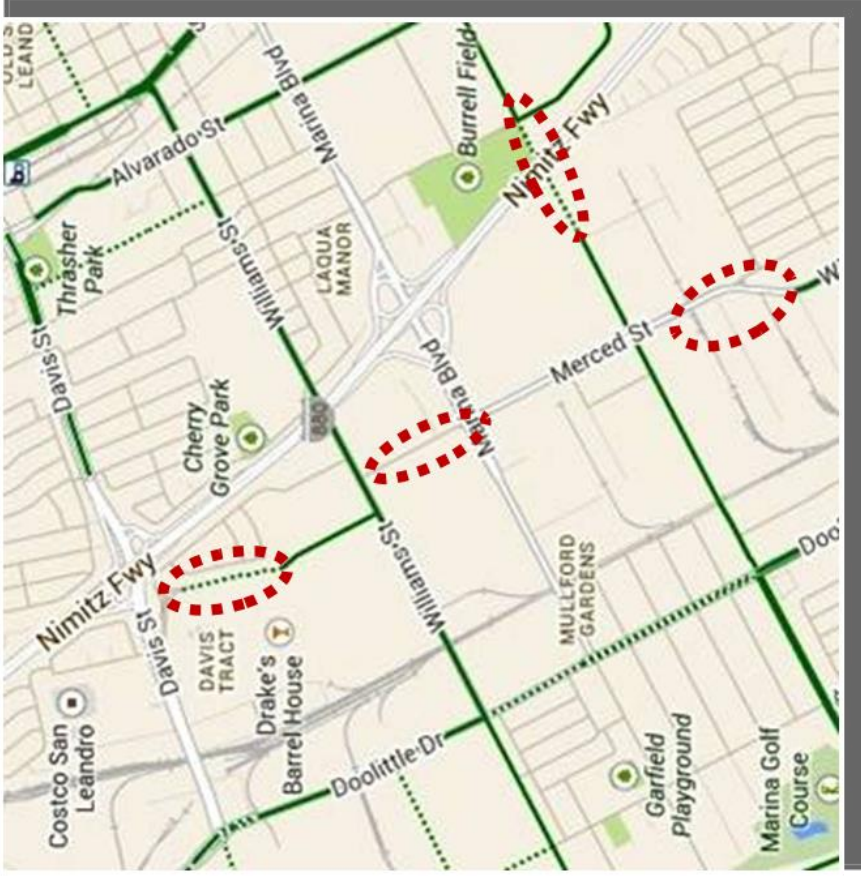


Figure 34. **INDUSTRIAL DISTRICT PEDESTRIAN LIGHTING RETROFIT CONCEPT:** Existing roadway streetlights in the industrial areas today have a single existing high pressure sodium (HPS) “cobrahead” luminaire and arm. These poles could be potentially be retrofitted with one new roadway height LED luminaire and arm (same orientation as existing) and one (as shown above left) or two pedestrian height LED luminaires + arms (two would be in the same line and perpendicular to the existing roadway arm). Power use would most likely be the same or less than existing, allowing existing circuits and footings to remain the same. This would create brighter streets (especially for pedestrians) and add a “tech” theme to workplace district streetscapes at low cost. A “Boulevard” corridor street could be provided with the twin-pedestrian luminaire configuration for a larger-scale character; a “Back Street” location could be provided with a single-pedestrian luminaire configuration for a more modest scale. Where budget permits, new supplementary single pedestrian poles (shown at right) could be installed in between widely-spaced existing roadway poles for more uniform coverage. *Image of example courtesy of Associated Lighting Representatives and Philips Lumec.*



# Increase bikeability (\$)



- Complete bike master plan's links. (\$\$)
- Shift excess lane width to bike lanes buffers with striping. (\$)

Figure 35. Improvements to walking, transit and bikeability will provide alternatives, more sustainability, and stronger community connections with the districts.

# Promote and Reward good design.



Figure 36. Giving recognition to good design will be a part of promoting a higher bar and awareness of better standards for the industrial districts.



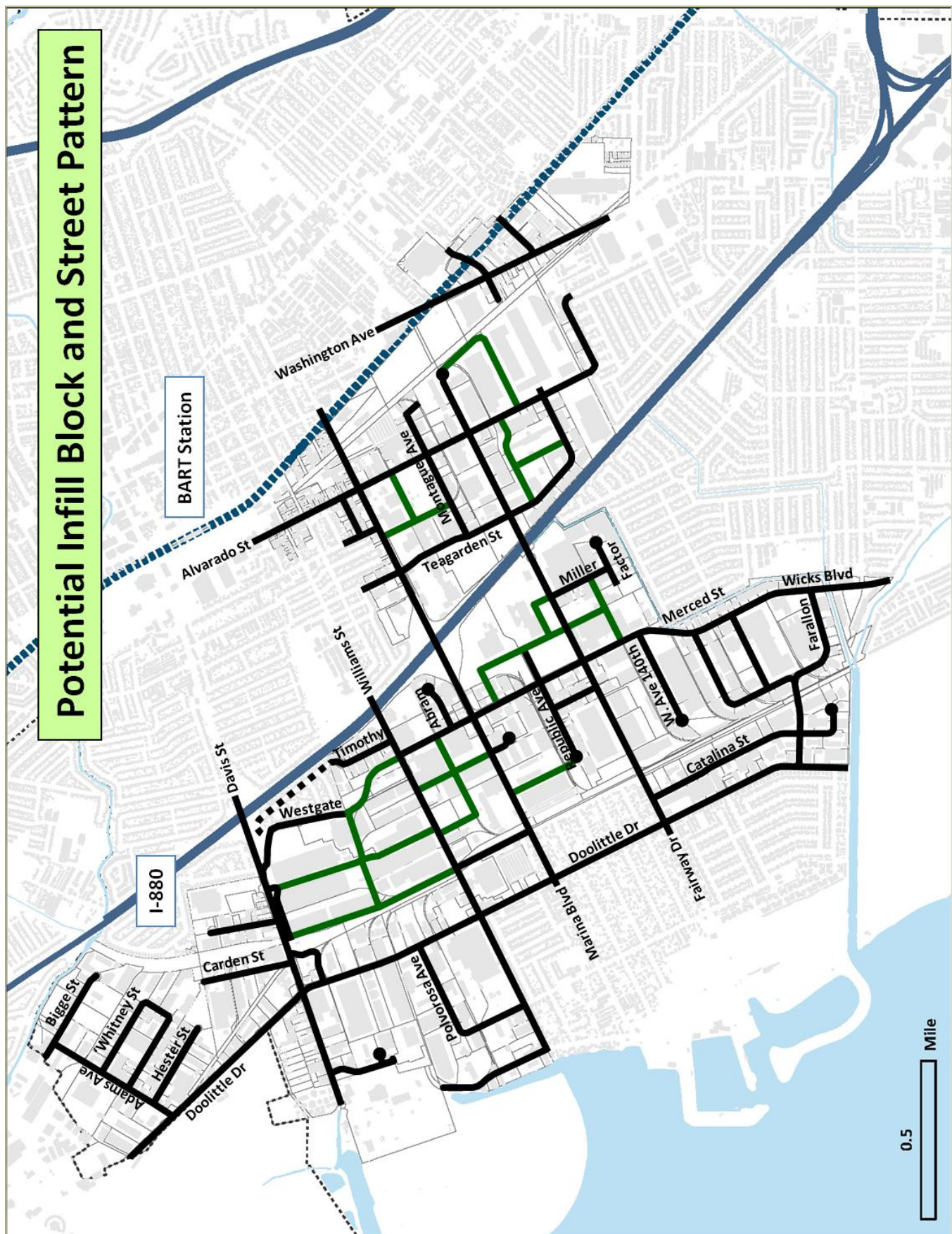


Figure 37. Map of a Potential Long-Term Infill Block and Street Pattern, with conceptual new streets to break up superblocks indicated in green. A form-based code can create the guidance for private investment to build out incremental changes in the street grid and gain value from new frontages and addresses that are created.

Table 1.

## Industrial Supply and Vacancy Rates for the East Bay and San Leandro

<b>Total Inventory</b>	<u>Warehouse</u>	<u>Manufacturing</u>	<u>Flex</u>	<u>Total</u>	<u>Percent</u>
Richmond	5,267,272	6,585,155	1,981,352	13,833,779	7%
Berkeley	2,449,987	4,138,960	1,761,615	8,350,562	4%
Emeryville	2,051,003	887,209	361,977	3,300,189	2%
Oakland	24,451,911	9,587,085	1,098,507	35,137,503	18%
Alameda	3,652,839	544,205	119,112	4,316,156	2%
San Leandro	13,963,580	5,679,399	2,489,375	22,132,354	11%
San Lorenzo	561,500	613,087	-	1,174,587	1%
Hayward	26,700,416	9,105,938	5,516,113	41,322,467	21%
Union City	9,827,472	2,887,489	1,403,711	14,118,672	7%
Fremont	8,643,864	14,536,917	20,112,952	43,293,733	22%
Newark	2,978,529	4,315,226	3,371,282	10,665,037	5%
Total	100,548,373	58,880,670	38,215,996	197,645,039	100%
<b>Vacancy Rates</b>					
Richmond	16.0%	7.1%	10.2%	10.9%	
Berkeley	1.8%	0.0%	17.1%	4.1%	
Emeryville	6.2%	1.4%	0.0%	4.2%	
Oakland	1.6%	6.0%	6.8%	2.9%	
Alameda	9.5%	8.1%	0.0%	9.0%	
San Leandro	4.6%	5.3%	3.9%	4.7%	
San Lorenzo	7.1%	0.0%	-	3.4%	
Hayward	5.3%	3.1%	10.4%	5.5%	
Union City	2.2%	5.0%	18.8%	4.5%	
Fremont	8.6%	7.3%	19.8%	13.4%	
Newark	13.9%	4.1%	21.4%	12.3%	
Total	5.2%	5.2%	16.3%	7.3%	

Source: CBRE, 2Q 2013 industrial report for the East Bay

Table 2.

# Number and Percent of Employees in Different Industries Within the Study Areas

<u>Number</u>	<u>Primary</u>	<u>Secondary</u>	<u>Tertiary</u>	<u>Total</u>
Contractor	2,899	4,048	1,981	8,928
Manufacturing	4,487	1,178	1,195	6,860
Retail	1,280	334	2,287	3,901
Service	486	1,001	515	2,002
Wholesale	456	285	122	863
<u>Other</u>	<u>15</u>	<u>11</u>	<u>129</u>	<u>155</u>
Total	9,623	6,857	6,229	22,709
<u>Percent</u>				
Contractor	30%	59%	32%	39%
Manufacturing	47%	17%	19%	30%
Retail	13%	5%	37%	17%
Service	5%	15%	8%	9%
Wholesale	5%	4%	2%	4%
<u>Other</u>	<u>0%</u>	<u>0%</u>	<u>2%</u>	<u>1%</u>
Total	100%	100%	100%	100%

Source: City of San Leandro business license data.



Table 3.

### Characteristics of Employees in San Leandro's Industrial Areas

<b>Industry Employment</b>	<u>Primary</u>	<u>Secondary</u>	<u>Tertiary</u>	<u>Total</u>
Construction	30%	59%	32%	39%
Manufacturing	47%	17%	19%	30%
Retail	13%	5%	37%	17%
Service	5%	15%	8%	9%
Wholesale Trade	5%	4%	2%	4%
<u>Other</u>	<u>0%</u>	<u>0%</u>	<u>2%</u>	<u>1%</u>
Total	100%	100%	100%	100%
<b>Commute Distance</b>				
Less than 10 miles	35%	37%	38%	36%
10 to 24 miles	31%	29%	32%	31%
25 to 50 miles	13%	13%	12%	13%
<u>Greater than 50 miles</u>	<u>21%</u>	<u>21%</u>	<u>18%</u>	<u>20%</u>
Total	100%	100%	100%	100%
<b>Education</b>				
Less than high school	14%	16%	12%	14%
High school or equivalent, no college	19%	18%	17%	18%
Some college or Associate degree	26%	26%	28%	27%
Bachelor's degree or advanced degree	22%	21%	22%	22%
<u>Information not available</u>	<u>19%</u>	<u>18%</u>	<u>20%</u>	<u>19%</u>
Total	100%	100%	100%	100%
<b>Sex of Employee</b>				
Male	68%	68%	67%	68%
<u>Female</u>	<u>32%</u>	<u>32%</u>	<u>33%</u>	<u>32%</u>
Total	100%	100%	100%	100%

Source: City of San Leandro business license data for industries work in, U.S. Census data from "longitudinal employer-household dynamics" for all other.

Table 4.

## Individual Listings of Vacant Industrial Space in San Leandro

	Total (000's of sf)	Office (000's of sf)	Percent Office	Clear Height
<b>Manufacturing</b>				
2756 Alvarado	166.3	2.3	1%	20
2010 Williams	148.0	6.0	4%	14
2020 Williams	75.5	1.8	2%	18
2020 Williams	31.3	1.3	4%	16
Total	421.1	11.4	3%	
<b>Warehouse and Distribution</b>				
1936 Fairway	157.3	7.8	5%	28
2351 Williams	146.0	4.5	3%	
1525 Alvarado	62.7	3.0	5%	28
1565 Alvarado	53.8	13.3	25%	20
751 W. 143rd Ave.	49.9	5.6	11%	28
19349 Washington	42.0		0%	30
2112 Adams	38.0	1.2	3%	
2521 Grant Ave.	32.2	2.2	7%	22
1250 Business Center Dr.	26.5	1.1	4%	
577 Alladin Ave.	22.1	2.0	9%	16
2529 Grant Ave.	21.4	2.0	9%	22
2750 Merced	20.6		0%	
1954 Williams	20.0	0.6	3%	28
1401 Factor Ave.	16.0	1.5	9%	26
1444 Factor Ave.	15.0		0%	24
1955 Davis	12.9	1.9	15%	24
2760 Merced	10.0		0%	
1974 Williams	10.0		0%	28
1960 Williams	8.4		0%	33
14275 Catalina	8.3		0%	21
2065 W. 140th Ave.	8.0	1.5	19%	18
1960 Williams	7.2		0%	33
1911 Fairway	6.0	0.5	8%	
2359 Verna	5.8	1.0	17%	18
2355 Verna	5.4	1.0	19%	18
2081 Adams	3.5		0%	
2374 Davis	2.5	1.0	40%	
Total	811.5	51.7	6%	
<b>Light Industrial</b>				
1800 Merced	105.4	7.5	7%	16
1577 Factor Ave	62.0	2.7	4%	22
1500 Doolittle	52.9		0%	22
2800 Miller	49.9	3.6	7%	20
1155 Beecher	47.2	17.0	36%	14
1786 Timothy	31.0	9.8	32%	
459 Hester St.	26.4	1.3	5%	16
1761 Timothy	22.9		0%	
2050 Farallon	20.2	2.5	12%	14
2235 Polvorosa	16.9	8.2	49%	18
1991 Burroughs	16.8	1.8	11%	15
1930 Fairway	16.5	2.8	17%	
1959 Republic	14.6	5.0	34%	16
1660 Factor Ave.	13.9	5.3	38%	18
1850 Fairway	13.0	0.6	5%	
693 Whitney	12.5		0%	20
14275 Wicks	10.8		0%	17
999 Beecher	10.0		0%	14
563 Harlan	9.8	2.5	26%	
1777 Nestor	9.8		0%	
1366 Doolittle	8.5		0%	16
2007 Edison	8.1	1.4	17%	
830 Montague	7.8	1.7	22%	

Table 4 cont'd.

## Individual Listings of Vacant Industrial Space in San Leandro

14676 Doolittle	6.1	2.0	33%	
720 Whitney	5.8	1.9	33%	18
2301 Verna	5.4	4.5	83%	20
1471 Doolittle	4.2		0%	16
1495 Doolittle	4.1	4.1	100%	16
3075 Teagarden	3.6	2.1	58%	
2091 Williams	3.4		0%	
1786 Timothy	3.2	1.6	50%	
728 Whitney	3.2	1.0	31%	18
14362 Wicks	3.1	1.5	48%	
14208 Doolittle	2.2		0%	
14270 Wicks	1.9	1.1	58%	
Total	633.1	93.5	15%	
Flex Space				
2952 Alvarado	12.0	1.5	13%	18
2401 Merced	12.0		0%	
650 Whitney	10.3	5.0	49%	14
14550 Wicks	7.9		0%	12
14709 Catalina	7.0		0%	
2954 Republic	6.9	1.0	14%	16
2954 Teagarten	6.9	1.0	14%	16
480 McCormick	6.7		0%	18
464 McCormick	4.9	4.9	100%	18
526 McCormick	4.8	4.8	100%	18
10810 Bigge	4.5		0%	16
130 Doolittle	4.4	2.0	45%	16
10922 Bigge	3.6	3.6	100%	
14713 Catalina	3.6		0%	
14820 Wicks	3.0		0%	
10808 Bigge	1.4		0%	16
14513 Catalina	1.4	0.6	43%	
<u>2404 Merced</u>	<u>1.4</u>		<u>0%</u>	
Total	102.7	24.4	4.8	
Total	1968.4			

## Definitions:

## Manufacturing

This is older space that in most cases was formerly occupied by a single large company like Kelloggs, usually with a minimum of office space, and relatively few garage or dock-high doors relative to its floor area.

## Warehouse and Distribution

This space usually has relatively large floor areas, high ceilings, minimal office space, a large number of dock-high doors, and a maximum site build-out of 50% to allow for truck turning and trailer storage. Older versions of this space built in the 1960s usually have rail spurs to the rear.

## Light Industrial

This is usually built for small to medium-scale users, often with 10 to 15% finished as office space. Usually a combination of garage and dock-high doors, often at the front of the building.

## Flex Space

This is usually newer space, built in the 1980s or thereafter, targeted at small to medium users with typical units of 2500 to 5000 s.f., usually set back from the street behind a landscaped berm, with 15 to 30% office at the front with garage doors to the rear accessible from a truck court.

Source: Joe Yamin, Colliers International



Table 5.

## Property Characteristics

## Parcel Acreage by FAR Grouping (by District)

	<b>primary</b>	<b>secondary</b>	<b>tertiary</b>	<b>Overall</b>	<b>Cum</b>
0	22%	23%	18%	21%	
.01 to .09	13%	22%	27%	20%	21%
.1 to .19	10%	14%	10%	11%	42%
.2 to .29	4%	9%	9%	8%	53%
.3 to .39	10%	8%	6%	8%	60%
.4 to .49	19%	9%	8%	12%	69%
<u>.5 and up</u>	<u>23%</u>	<u>14%</u>	<u>21%</u>	<u>19%</u>	81%
Total	100%	100%	100%	100%	<u>100%</u>

## Parcel Acreage by Decade Built of Improvements

pre-1920s	0%	0%	1%	0%	0%
1920s	0%	0%	0%	0%	0%
1930s	0%	10%	0%	3%	4%
1940s	1%	7%	6%	5%	8%
1950s	24%	21%	20%	22%	30%
1960s	28%	18%	18%	21%	51%
1970s	20%	20%	39%	26%	77%
1980s	19%	15%	4%	13%	90%
1990s	5%	6%	7%	6%	96%
2000s	3%	3%	6%	4%	100%
<u>n/a</u>					
Total					

## Consolidated Parcels by Size Grouping by District

0 to 2.99	30%	24%	27%	27%	27%
3 to 4.99	8%	18%	21%	15%	42%
5 to 9.99	23%	22%	15%	20%	63%
10 to 24.99	30%	27%	24%	27%	90%
<u>25 and up</u>	<u>9%</u>	<u>8%</u>	<u>13%</u>	<u>10%</u>	100%
Total	100%	100%	100%	100%	