



Leland/Bayshore Commercial District Revitalization

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Asian Neighborhood Design



Acknowledgements

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Chinese for Affirmative Action

Visitacion Valley Community Development Corporation

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Introduction

In the spring of 2004, Urban Solutions and the Bay Area Local Initiatives Support Corporation, in collaboration with Asian Neighborhood Design, initiated an economic revitalization program for the Leland Avenue Commercial District in San Francisco's Visitacion Valley neighborhood. Working with a local steering committee comprised of representatives from three neighborhood-based organizations, this technical assistance team facilitated a series of four community workshops intending to establish an identity and vision for the commercial district. The workshops culminated in the drafting of an action plan that lays out specific improvements and strategies necessary for the realization of the community's vision.

What follows is a description of the planning process and a detailed account of the resulting Action Plan. Underlying this work is the recognition that while Visitacion Valley has experienced a series of successful planning exercises over the last few years, the resulting plans have often not addressed practical methods for implementing objectives nor adopting strategies for sustaining the organizational capacity necessary to carry out the plans. The goal of this project, then, is to enrich the lives of those who live and work in Visitacion Valley by improving the commercial core of the neighborhood; to build consensus on a vision for the commercial core; and to establish a clear road map to guide the work as well as develop the community's capacity to accomplish its goals.



Generalized "market shed" for Visitacion Valley

Context

The Leland/Bayshore Commercial District is the local commercial hub of Visitacion Valley, an ethnically diverse, lower income neighborhood

located in the southeastern portion of San Francisco. Named by a Franciscan Priest in 1777 to commemorate the Virgin Mary's visit to St. Elizabeth, Visitacion Valley is home to some 14,000 residents. According to the San Francisco Planning Department, 59% of the residents are Asian, with nearly equal percentages of African Americans, Whites and Hispanics making up the remain 41% of the population. In comparison with the rest of San Francisco, residents of Visitacion Valley are poorer than the average San Franciscan, with median household income at \$43,700 (as compared with the city median of \$50,800), and younger, with 22% of the population under the age of 18 years (as compared with 14.5% citywide).

Like much of San Francisco, Visitacion Valley has experienced rising residential and commercial real estate values. However, the neighborhood still maintains a relatively affordable housing stock, and is the home to both the Sunnyside Housing Projects and new affordable housing developments that have replaced the much-maligned Geneva Towers, which were imploded in 1998 after years of neglect and deterioration.

Several neighborhood improvements are currently underway which will no doubt help to spur new

development and commercial activity, and bring new consumers to the Leland/Bayshore Commercial District. The Caltrain Bayshore Station is slated to be upgraded, improving the regional transit link to communities along the Peninsula. And the southern extension of the Third Street Municipal Light Rail will soon be completed, improving connection to San Francisco's central core. In addition, the Schlage Lock site, a former industrial site located at the western terminus of Leland Avenue, is currently being planned for new residential and commercial development. Once considered for a regional center for Home Depot, the site was the subject of an extensive community planning effort after local residents organized against the intrusion of the "big box" retailer. The development of the Schlage site represents both an opportunity to bring new residents to the area who may become clients to Leland Avenue shops and services, as well as a risk in that some of Leland Avenue's current activity and liveliness could be siphoned off in favor of larger scale commercial development proposed for the southern end of the Schlage site.



Aerial photo of Leland Ave. at Bayshore Blvd.

Leland/Bayshore Commercial District

The core of the commercial district is approximately five blocks in length, beginning with a newly constructed community center at its western edge, and culminating at the intersection of Leland and Bayshore at its eastern end, adjacent to the Schlage Lock Site. In the tradition of San Francisco's numerous neighborhood commercial districts (NCD's), Leland Avenue is characterized by ground floor retail uses and services, with most structures including housing above. As you move west, toward the community center, the street becomes more residential with commercial uses sitting

adjacent to residential buildings. The scale of structures varies from single story commercial buildings to three-story buildings housing both commercial and residential uses.

Leland Avenue's current assets include a lively mix of architectural styles, a diverse group of businesses (see attached Business Inventory List and Map), an attractive scale of street and block size, and relatively wide sidewalks, which encourage pedestrian activity. There are several important community amenities, including a new community center, a through-block greenway, a post-office, a bank branch, and a new branch library slated to begin construction in the next two years. Finally, and perhaps most importantly given the variable San Francisco climate, Visitacion Valley and Leland Avenue benefit from sunny weather.

Bayshore Blvd. is a major transit corridor which is being improved to include a new extension of the Municipal Light Rail (MUNI) system. Along this stretch of Bayshore, a mix of commercial and residential uses predominates, particularly along the western side of the street. To the east sits the Schlage Lock site, slated to include new residential units, and at the southern corner at Sunnydale, new commercial uses.

The district, however, suffers from several challenges or deficiencies. There are a number of vacant and/or boarded-up storefronts along these commercial corridors, and graffiti and litter are problematic. In contrast to many of San Francisco's NCD's, the local bus line does not travel along the main corridor (Leland Ave.), but instead is routed on a parallel street, limiting direct access to public transit for visitors and consumers. Furthermore, the new MUNI light rail stops will be located not at the corner of Leland and Bayshore, but instead are two to three blocks away at Arleta to the north and Sunnydale to the south. Above ground power lines and telephone poles create a visually cluttered environment.

Process

The Leland/Bayshore Commercial District Revitalization Community Action Plan is the product of a series of four community workshops

held during the summer and fall of 2004. Participants included local merchants, residents, city officials, and local community advocates. Topics for discussion at each of the meetings were developed in coordination between the project technical team and the local steering committee. Outreach for each of the workshops was conducted in English, Spanish and Chinese (see sample flyer), and was directed to both neighborhood residents and local merchants. Special effort was given to encouraging merchants and commercial owners to actively participate in the workshops, including arranging for the Mayor and District Supervisor to co-sign a letter of invitation directed at these constituents. Attendance at the workshops ranged from 30-50 people.

Prior to the first workshop, LISC and Urban Solutions worked to collect background data, including existing plans and reports related to the project area, summaries of previously identified needs, and base maps. In addition, field surveys were conducted in order to create a building and business inventory for the district, as well as identify vacant and/or underutilized sites that represent potential opportunities for future development.

In July of 2004, Workshop #1 was held in the community center. The principal components of the agenda were to: a) introduce the project goals and sponsoring organizations, b) identify community priorities for action based on a compiled list of potential action items, and c) to begin to create a “vision statement,” for the district which would provide broad guidance for all future development work.

Workshop #2 provided a follow up to the “visioning” exercise, and focused on a discussion of potential physical improvements to the district that could assist in bringing about the community’s developing vision. At the end of the workshop, participants were asked to review existing businesses in the neighborhood, and discuss what kinds of businesses and services they would like to see as part of a business attraction strategy.

At Workshop #3, the Vision Statement was finalized and a draft Action Plan was presented to the group. As part of the Action Plan, a business attraction strategy was presented based on the previous

workshop’s discussion and participants were asked to prioritize desired businesses by type.

At the fourth and final Workshop, a final Community Action Plan was presented. Participants were asked to break into groups, each group forming the basis of a new work committee responsible for oversight of a portion of the tasks outlined in the Action Plan. These committees will work the Steering Committee to coordinate and oversee implementation of the Action Plan.



Opening presentation at Workshop #1

Community Action Plan

The community's Action Plan for the Leland/Bayshore Commercial District is the working blueprint for a variety of enhancements in the area. It identifies specific improvements to make Leland Avenue and Bayshore Boulevard an attractive and vital commercial district, and lays out basic implementation steps to guide the community's efforts towards accomplishing these objectives. All progress in implementing this revitalization program will come under the direction and leadership of a community steering committee working with staff support, local community organizations, volunteer committees and city agencies as needed to carry out the specific actions.

Vision Statement

The community's Vision Statement for the Leland/Bayshore Commercial District is a framework for the actions the community aims to take to improve the area. It sets a goal for what the community would like to achieve in the next five years.

2. Select a primary coordinating organization, or secure other staffing resources, with suitable experience to manage the program under the direction of the steering committee
3. Raise funding for staffing necessary to carry out program tasks in implementing the Action Plan

Organization

The Action Plan recommends that the community steering committee take a number of steps to develop the organizational capacity to carry out the Action Plan improvements over the multi-year timeframe for its full implementation.

In the Action Plan each item is assigned to a "lead" organization that is responsible for pursuing the steps towards implementation of the action and for coordinating with other "key support" parties to create the necessary capacity and resources. Three volunteer working committees are envisioned in this Action Plan to augment the resources and expertise of the various formal organizations and public agencies in stewarding this program:

Organizational Steps:

1. Expand the core membership of the steering committee and establish report-out and participation processes for the broader community, including setting up task-oriented working committees of community volunteers
1. Maintenance and Public Space (MPS Cmte.)
2. Public Safety & Security (PSS Cmte.)
3. Promotion and Business Support (PBS Cmte.)

The Vision Statement:

Visitacion Valley's commercial district is a thriving village center that is a welcoming and safe environment with shops, restaurants and services providing for a wide variety of affordable daily needs of neighborhood residents. The commercial district is well connected to the surrounding neighborhood and creates gathering places for the community's diverse population, particularly for its large youth and family population. Public transit is easily accessible for residents to travel between the commercial district and their homes as well as connections to the rest of the city, and reasonable parking opportunities are also available. The entrance to the commercial district is distinctly marked to give a sense of arrival and pride of the Valley. There are people on the street and cafes and retail activity spill out into the public space, taking advantage of Visitacion Valley's sunny weather and enjoying the unique greenery in the neighborhood. The village center is a lively, pedestrian-friendly and visually appealing environment for eating, shopping and socializing during the daytime and into the early evening hours.

Community Action Plan Items

The following list is a description of the action items that workshop participants felt were most important in order to realize their vision and promote the revitalization of the district. Items are divided into the following categories.

- Design/Physical Improvements
- Safety and Cleanliness
- Promotion
- Economic Development

Design/Physical Improvements

Storefront cleaning and graffiti abatement

An inexpensive and effective way to make a positive impact on the physical environment in the near term is to organize a clean-up effort targeting poorly maintained storefronts and those buildings that have been “tagged” by graffiti. SF’s Department of Public Work’s sponsors a graffiti abatement program that may be able to offer assistance. Other ideas include purchasing cleaning supplies and establishing a “rapid response clean team,” that could quickly address clean-up-needs. A Department of the Environment funding grant may be one way to pay for this work.

Façade Improvement

Improving dilapidated and deteriorated store facades with new paint, windows, and awnings, can significantly improve the street environment and encourage pedestrian foot traffic and visits to local merchants. The Mayor’s Office of Community Development sponsors a Façade Improvement

Program that pays for design services and provides matching funds to local merchants so that they can upgrade their storefronts. Eligibility criteria, an approval process, and the development of a client list and outreach strategy would need to be established prior to implementing the program. Development of design guidelines for storefront signage could also help bring coherency and vibrancy to the streetscape along Leland.

Streetscape Improvements

Street trees, plantings, and “pedestrian-scale” lighting (attractive light stands which include greater detail and are smaller than the very tall “cobra” lighting currently installed along Leland) can help to create an attractive and comfortable environment for pedestrians. A concept plan (already developed as part of the workshop series) should be submitted to the Department of Public Works, who would in turn develop more detailed plans, select materials, and develop a budget for implementation. MTC funding and/or Prop K funding may be available for this work



This “before and after” photo montage shows how street trees and new lighting would improve the district

Pedestrian Safety at Intersections

“Bulb-outs” are extensions to the sidewalk at intersections. They reduce the distance across a street, providing a stronger connection from one side to the other. Reducing the distance at cross walks can improve safety, especially for seniors, who may walk slowly and need more time to traverse the street. Bulb-outs can also serve as a street amenity by creating space for plantings, newspaper stands, benches, etc. Distinct paving at crosswalks can likewise increase safety, clearly delineating the pedestrian path across the street, and provide a visually appealing pattern along the street’s surface. Providing bulb-outs and cross-walk paving was seen as most important at the Leland and Bayshore intersection, strengthening the connection across the wide avenue, and at the corner of Leland and Rutland where the new library will be built. Again, concept plans should be submitted to the Department of Public works for pricing and development of construction plans. An MTC grant and/or Prop K funding may be available for this work.

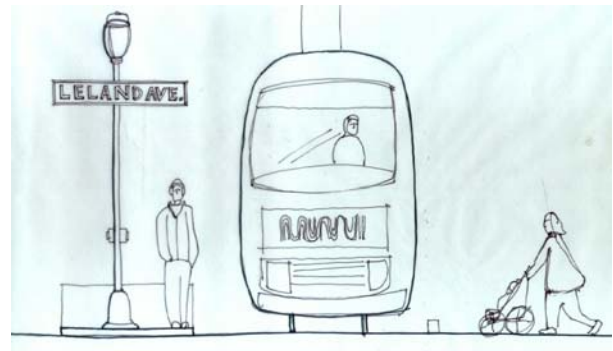


Bulb-outs and special paving can serve as a design amenity and increase pedestrian safety

“Welcome to Visitacion Valley” Sign

Workshop participants emphasized the need to design the Leland/Bayshore intersection as a place of arrival so that as commuters travel along Bayshore on foot, in cars, or on the new MUNI rail line, they will take notice that they are entering Visitacion Valley and passing through its main commercial street. A “welcome” sign or other piece

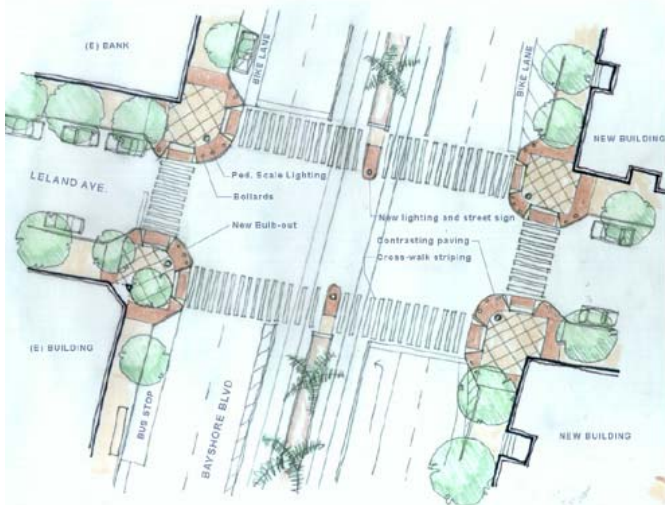
of distinct public art, placed at the intersection, will help signal the intersection as a gateway to the neighborhood. Development of a signage design could be done through the holding of a design competition in coordination with the San Francisco Art Commission. Any plans or designs will need to be approved by MUNI and the Department of Parking and Traffic to insure that neither pedestrian nor vehicular safety is compromised by the placement of the marker. Public art funding and/or an MTC grant may be available to support the project.



Distinct signage at Leland and Bayshore will signal to MUNI commuters that they are arriving the Leland Avenue Commercial District

Connection to the Schlage Lock Development

When the Schlage Lock site is developed, it will bring new housing and hundreds of new residents to Visitacion Valley. Extending Leland Avenue across Bayshore and through the Schlage site, and insuring that streetscape amenities located to the west of Bayshore are continued on the newly developed eastern side of Leland, will help to create a strong connection between the existing commercial district and the new development. Bulb-outs and textured crosswalks, as discussed previously, will improve pedestrian safety across Bayshore and further emphasize a connection between the existing and the new. As plans for the Schlage site are developed, it is important for the Steering Committee to monitor the development and work with the developer and the Department of City Planning to design a strong connection to the commercial corridor. Developer fees, MTC grant, and Prop K funding may be used to help fund design and street improvements.



A strong connection between the existing commercial corridor and the new Schlage development can be created by using bulb-outs, cross-walk striping or paving, and carrying new lighting and street tree improvements through the intersection and into the new development.

Underground wires

Currently, Leland Avenue is cluttered with a canopy of power and telephone lines and the sidewalk is dotted with a multitude of supporting poles. Undergrounding these wires will eliminate this visual clutter and help to create space for new street amenities such as trees and pedestrian-scale lighting. PG&E is in the process of undergrounding wires throughout San Francisco, though the timetable for this project is not set, nor has funding been allocated to complete the entire project. It may be possible for an organized community like Visitacion Valley to work with the District 10 Supervisor and advocate for prioritization of the neighborhood. This work should be coordinated with excavation and infrastructure preparations at the Schlage Lock site.



Leland Avenue looking east toward the Schlage Lock site as it exists today

Removal of Offensive Billboards

Community members have long been concerned about large and unsightly billboards. The Maintenance and Public Safety Committee should take the issue to the District 10 Supervisor and the Department of City Planning to explore avenues for eliminating this visual blight.



Leland Avenue after undergrounding of power lines and addition of new trees and lighting

Safety and Cleanliness

Anti-Litter Strategy

Another relatively low-cost method of improving the district is to organize community clean up events every quarter. This should be coordinated with the Department of Public Works' "Clean City Coalition" Program. Additionally, providing additional trash receptacles, and perhaps improving or painting existing receptacles, will help to encourage people to throw away their trash. A Department of Energy funding grant may be available to support this work.

Pedestrian and Traffic Safety

Pedestrian and traffic safety are important issues for the community, especially along the major transit thoroughfare of Bayshore Boulevard. A field survey of pedestrian use areas should be conducted to determine the location of areas where the most accidents occur. Coordination with the Department of Parking and Traffic will be necessary to complete a traffic calming analysis and to develop design concepts. DPT grant funding may be available for the necessary studies while Prop K and future developer fees may help cover the costs of any traffic calming design measures. The Senior Action Network has worked on traffic safety issues as related to senior safety and could be an important ally.

Youth Programs

A consistent opinion voiced by workshop participants was that more programs for youth were necessary in the neighborhood. The Promotion and Business Support Committee should work with local non-profit organizations such as Visitacion Valley Jobs and Employment Training, Visitacion Valley CDC, and the Weed and Seed Program to develop programs structured for young people.

Police Sub-station

Because safety is of primary concern, the community supports the inclusion of a SFPD sub-station along Leland Avenue. The Public Safety and Security Committee should open discussions with the Police Department to determine the feasibility of locating a substation along Leland.

Neighborhood Watch Program

While finding the resources necessary to provide a police station along the commercial corridor may take some time, a Neighborhood Watch Program can help to increase safety in the short term through resident and merchant organizing. The Public Safety and Security Committee should consult with other similar programs in the City as well as talk with the SFPD about any available resources to support such a program.

Increased Police Presence

Community members and residents, with leadership from the Public Safety and Security committee can solicit from the Police Department additional patrols and an increased police presence on Leland Avenue and surrounding streets at night.

Sidewalk sweeping program

The Maintenance and Public Space committee should research costs for weekly broom-sweeping services and select potential contractor. MOCD funding may be available to support such a program. Future developer fees might also be applied toward such a program.

Promotion

Street Festival

Street fairs and festivals, common in many neighborhoods in San Francisco, bring citywide attention to specific districts and can highlight local shops and amenities. The Mayors Office of Neighborhood Services should be able to provide information on street festivals in other districts, including cost considerations and logistical issues. The Promotion and Business Support Committee, once costs and feasibility have been researched, should develop a list of potential vendors and participants.

Media Campaign

Creating a theme or identity for the district can help to attract visitors and shoppers. Participants in the workshop series frequently mentioned Visitacion Valley's favorable weather and sunny conditions as local characteristics that could be used to promote the area through media and marketing materials (i.e. "The Sun Rises in Viz Valley"). It may be possible

to launch such a media campaign in coordination with the beginning of a street festival.

Holiday Decorations

Providing assistance to businesses so that they decorate for the holidays can help attract shoppers to the area during times of heightened consumerism. Support offered by the PBS committee could include outreach to merchants, fundraising, organizing volunteers, and coordinating logistics. As a first step, a group of workshop participants organized to decoratively wrap the parking meters along Leland for the holiday season 2004. The Visitacion Valley Planning Alliance will be an important collaborator in this endeavor.

Showcasing of Local History

Visitacion Valley and the Leland Avenue commercial district have a distinct and colorful history. Highlighting this history and making it visible through photos and displays will help not only to educate residents and visitors about the history of the neighborhood, but also to market the district as a place worthy of visiting. Possible strategies include outreaching to merchants and commercial property owners, placing photos in windows or vacant storefronts, and in coordination with City Guides, organizing historical walks of the area.

Multicultural and Intergenerational Events

One of the area's newest amenities is a through-block greenway, development of which was lead by the Visitacion Valley Planning Alliance. At the intersection of the greenway and Leland Avenue is

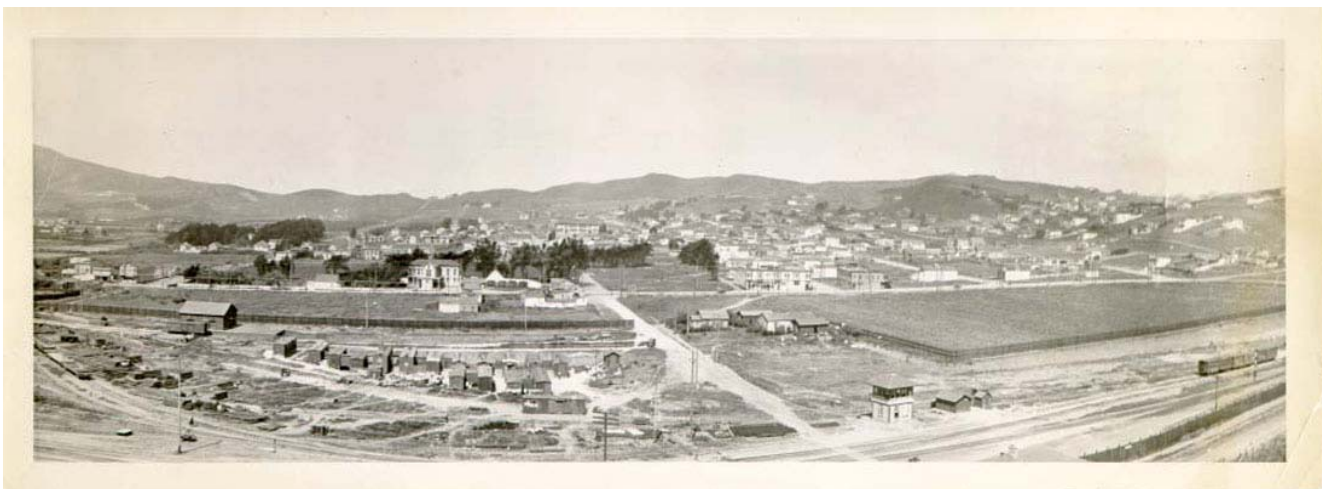
the Hans Schiller Plaza which provides a prime locale for organizing multicultural and intergenerational events that can help to build community and strengthen personal connections with neighbors. Indeed, a Halloween celebration was held at the Plaza in 2004 and attracted a wide array of participants from the neighborhood. Ideally, future such events, both at the Plaza and other locations, would attract not only local residents, but also visitors from other neighborhoods who might choose to return in the future to take advantage of the district's stores and services.

“Visual merchandising”

A visual merchandising consultant can help merchants to find effective ways to showcase and display their products and services. Not only will this help to increase merchant profits, but it will also contribute to an open and lively pedestrian environment along Leland Avenue. The Steering Committee and its staff should research costs associated with hiring of a consultant and outreach to local merchants. MOCD may be a source of potential funding.

Street Banners

Street banners or other visual markers along Leland Avenue can also help to signal the corridor as a distinct and special place. Other neighborhood commercial districts in SF have used this strategy to increase consumer awareness and convey a neighborhood identity. Any such street markers should be coordinated with other desired street improvements. A design competition might be one way in order to generate design ideas.



An historic photo of Visitacion Valley (no date) from the San Francisco History Center, San Francisco Public Library



Leland Avenue/Bayshore Boulevard Commercial District Business Inventory

Economic Development

Small Business Assistance

Assistance should be provided for existing business along Leland and Bayshore to help insure their long-term viability. Available services and resources will need to be identified by the Steering Committee and its staff. Then, outreach to local business should occur in the form of informational workshops.

Business Recruitment

The liveliness and attractiveness of Leland Avenue and Bayshore Boulevard is limited by the presence

of several vacant and boarded up storefronts. A priority for the community is filling those commercial spaces with active ground floor uses. Recruiting new businesses will require preparing marketing materials, and encouraging property owners to list vacancies on MLS and SF Prospecter. In addition, participants in the workshop series established a list of desired business types and priority criteria for business attraction (see attached Business Development Strategy). The Steering Committee and staff should work with a leasing agent to insure that community priorities are communicated to prospective businesses during

recruitment. In addition, the committee and staff should monitor the business recruitment phase of the Schlage Lock site development, and advocate for community priorities.

Farmer's Market

A weekly or monthly farmer's market is one way to create greater interest in the district and attract a new set of consumers to the corridor. Feasibility analysis of such an initiative will be necessary and should include considerations of existing business.

Coordination with the Visitacion Valley Planning Alliance and The Mayor's Office of Economic and Workforce Development will be important to the success of this endeavor.

Job Training and Support for Local Entrepreneurship

Attracting or starting businesses that provide job training and entrepreneurship opportunities for local residents will help to insure that the benefits of a more favorable business environment are experienced by the local community. The University of California San Francisco has a program to provide opportunities for small local business to access University contracts for goods and services. VVJET provides job training.

Merchants Association

An organized community includes an organized merchant association. Formation of such a group will greatly facilitate many of the advocacy initiatives listed in the Action Plan. In order to form an inaugural merchant committee, door-to-door outreach will be necessary. Eventually, an organization name, logo, and goals/objectives should be established, as well as a regular meeting schedule. Formation of a merchants association will be one of the priorities for the Promotion and Business Support Committee.

49ers Games Foot Traffic

Local games of the San Francisco 49ers draw a multitude of visitors to nearby Candlestick Park. If merchants were encouraged to stay open later for games, the district could attract some of the attendees for pre-game or post-game shopping.

Transit Along Leland

Currently, the local bus does not travel down Leland, but instead is routed along a parallel street. In

addition, the two new MUNI stops will be located blocks to the north and south of the Leland/Bayshore intersection. Thus, Leland is not able to exploit access to transit lines as well as other neighborhood commercial districts in the city where such access is direct. The issue should be further discussed within the community and preliminary discussions should occur with MUNI and DPT as to the feasibility of rerouting or adding bus lines that will travel down Leland.

Cooperative Advertising

By pooling resources, small local business may be able to generate a stronger advertising campaign than would be possible working individually. The Steering Committee should work with a small business consultant to determine the cost of creating such a campaign. Outreach to the merchants should then occur to determine level of interest in participating.

Parking

Despite the newly extended MUNI light rail line, many people will continue to use autos as their principal means of getting to and from Visitacion Valley and the Leland commercial district. Providing increased parking will help to insure that visitors can continue to drive to the area. A parking demand study will help to determine the parking needs, and it may be possible that some underutilized parking lots currently located along the corridor could be more fully exploited as visitor parking. The Steering Committee should coordinate with the Department of City Planning and Parking and Traffic and explore the possibility of using future developer fees to pay for any required studies or analysis.

A Grocery Store

Visitacion Valley has, for a long time, lacked a full service grocery store. This is a high priority for many residents. Currently, a grocery store is being considered for inclusion as part of the Schlage Lock development. Working with the VVPA, DCP, and the local supervisor, community members should continue to monitor the development of the Schlage lock site and advocate for including a grocery store as the initial plans indicate.

Workshop Support Materials

Visitacion Valley is changing....

What kind of neighborhood do you want it to become?



Come join us as we continue to develop a vision for our neighborhood!

Leland/Bayshore Commercial District Revitalization Community Workshop #2

Wednesday, September 1 5:30-7:30PM
Visitacion Valley Clubhouse (Leland Ave. at Cora St.)

Light dinner will be served

The development of the Schlage Lock site, the MUNI light rail service extension, the construction of a new library, the Greenway and a number of new buildings and businesses... All of these upcoming changes will have a big impact on Visitacion Valley, and particularly its commercial hub, Leland Ave. and Bayshore Blvd. This is the second of four workshops that will make sure that these changes will serve the community and strengthen our commercial district! Come bring your ideas!

For more information please contact Russel Morine at 656-0540 or rmorine@aol.com or Tara Hui at 587-5779 or thui@caasf.org.

Conveners: Visitacion Valley Planning Alliance, Visitacion Valley Community Development Corporation, Chinese for Affirmative Action, Supervisor Sophie Maxwell's Office and the Mayor's Office of Economic and Workforce Development.

訪谷正在改變中....

你希望這裡成爲一個怎樣的社區？



請出席會議和我們一起繼續發展一個本區的未來遠景！

Leland/Bayshore 商業區復甦計劃 社區會議 #2

九月一日星期三，下午五時三十分至七時三十分
Visitacion Valley Clubhouse (Leland Ave. at Cora St.)

敬備晚餐

Schlage Lock 的發展工程、MUNI 輕鐵的服務工程、新圖書館、Greenway 和多座建築物及商業的興建... 所有這些均會對訪谷區造成巨大的影響，特別對其商業中心，Leland Ave 和 Bayshore Blvd. 有巨大的影響。這是我們一系列四個會議中的第二個，目的在確保這些改變能服務社區，及加強我們商業區的活力！請出席會議，提供意見！

查詢詳情請聯絡 Russel Morine，656-0540 或電郵：rmorine@aol.com；或 Tara Hui，587-5779 或電郵 thui@caasf.org。

召集者：Visitacion Valley Planning Alliance, 訪谷社區發展機構、華人權益促進會、市參事麥斯維爾辦事處及市長經濟及工作力發展辦事處

Visitacion Valley está cambiando....

¿En qué tipo de barrio te gustaría ver que se convirtiera?

¡Únete a la campaña para desarrollar una nueva visión para nuestro barrio!

Planeación para el distrito comercial Leland/Bayshore Taller comunitario #2

Miércoles, 1 de Septiembre 5:30-7:30 pm
Visitacion Valley Clubhouse (Leland Ave. con Cora St.)

Se servirá una cena liviana

El desarrollo del antiguo sitio de la fábrica de Schlage Lock, la extensión de servicio de tren de Muni, la construcción de la nueva biblioteca, el proyecto Greenway y el desarrollo e introducción de nuevos edificios y negocios al barrio... Todas estas cosas representan cambios en el corto y mediano plazo que impactarán profundamente a Visitacion Valley, especialmente al corazón comercial del sector, Leland Ave. y Bayshore Blvd. ¡Esta es el segundo de cuatro talleres comunitarios para asegurar que estos cambios sirvan a los intereses de la comunidad y contribuyan a fortalecer a nuestro distrito comercial!

Para más información comuníquese con Russel Morine al: 656-0540 o rmorine@aol.com o Tara Hui al 587-5779 o thui@caasf.org. Convocadores: Visitacion Valley Planning Alliance, Visitacion Valley Community Development Corporation, Chinese for Affirmative Action, Supervisor Sophie Maxwell's Office y Mayor's Office of Economic and Workforce Development.

訪谷正在改變中....

你希望這裡成爲一個怎樣的社區？

請出席會議和我們一起繼續發展一個本區的未來遠景！

Leland/Bayshore 商業區復甦計劃社區會議 #2

九月一日星期三，下午五時三十分至七時三十分
Visitacion Valley Clubhouse (Leland Ave. at Cora St.)

敬備晚餐

Schlage Lock 的發展工程、MUNI 輕鐵的服務工程、新圖書館、Greenway 和多座建築物及商業的興建，，，所有這些均會對訪谷區造成巨大的影響，特別對其商業中心，Leland Ave 和 Bayshore Blvd. 有巨大的影響。這是我們一系列四個會議中的第二個，目的在確保這些改變能服務社區，及加強我們商業區的活力！請出席會議，提供意見！

查詢詳情請聯絡 Russel Morine，656-0540 或電郵：rmorine@aol.com；或 Tara Hui，587-5779 或電郵：thui@caasf.org。召集者：Visitacion Valley Planning Alliance，訪谷社區發展機構、華人權益促進會、市參事麥斯維爾辦事處及市長經濟及工作力發展辦事處



Outreach was made to merchants with letters of invitation signed by both Mayor Gavin Newsom and District 10 Supervisor Sophie Maxwell. Letters were written in both English and Chinese.

Action Plan Summary

The Action Plan is a working document that will be updated and amended according to the evolving priorities of both the Steering Committee and the larger Visitacion Valley community. The Plan summarized below represents the final version produced at the conclusion of the workshop series.

Item/Action	Timing	Lead	Key Support	Funding
Design/Physical				
1. Help businesses clean their storefronts, do graffiti abatement <ul style="list-style-type: none"> • Coordinate with DPW's graffiti abatement program; • Purchase supplies; • Establish rapid-response clean team. 	Short	MPS Cmte.	DPW, Weed & Seed, Clean City Coalition	DOE funding grant Neighborhood Beautiful Fund
2. Implement a façade improvement program, create stricter guidelines for store signage <ul style="list-style-type: none"> • Design façade program with eligibility criteria, approval process, etc; • Create design guidelines; • Contract for design services; • Develop potential client list and outreach strategies. 	Medium	Program Manager	MOCD	CDBG funding Low-interest loans Potential Developer Fees
3. Put in more trees and pedestrian-scale lighting on the street <ul style="list-style-type: none"> • Submit concept plans to DPW for engineering designs, materials selection and cost calculations. 	Medium	Program Manager	DPW, MPS Cmte.	MTC Grant Prop K
4. Create bulbouts and textured crosswalks at intersections <ul style="list-style-type: none"> • Submit concept plans to DPW for engineering designs, materials selection and cost calculations. 	Medium	Program Manager	DPW, DPT, MPS Cmte.	MTC Grant Prop K
5. Install a "Welcome to Visitacion Valley" sign and/or other public art (i.e. San Francisco heart) <ul style="list-style-type: none"> • Design competition (?); • Coordinate proposal through Art Commission; • Submit siting plan to MUNI and DPT for approval. 	Medium	MPS Cmte.	Program Manager, DPW, DPT, MUNI	Public Art Funding MTC Grant
6. Ensure there is a physical connection b/w Leland and the Schlage development (i.e. special tiled crosswalk) <ul style="list-style-type: none"> • Coordinate with DCP to finalize concept plans with Schlage Lock site streetscape plan; • Submit concept plans to DPW for engineering designs, materials selection and 	Long	Program Manager	DCP, DPW, MPS Cmte.	MTC Grant Prop K Potential Developer Fees

cost calculations.				
7. Underground wires <ul style="list-style-type: none"> • Advocate to DPW and PG&E for prioritization of Viz Valley phasing; • Coordinate with excavation and infrastructure prep at Schlage Lock site 	Long	MPS Cmte.	DPW, MOED, D10 Supe	
8. Ensure that offensive billboards are removed <ul style="list-style-type: none"> • Advocate to district supervisor for Planning Code amendments relative to billboard siting and use allowances 	Ongoing	MPS Cmte.	D10 Supe, DCP	

Item/Action	Timing	Lead	Key Support	Funding
<i>Safety and Cleanliness</i>				
1. Create an anti-litter strategy (i.e. clean-up event, anti-litter campaign, more/nicer trash cans, etc.) <ul style="list-style-type: none"> • Coordinate with DPW's 'clean city coalition' program; • Schedule quarterly community clean-up events; propose painting of trash containers from DPW. 	Short	MPS Cmte.	DPW, Program Manager, Weed & Seed	DOE funding grant
2. Explore traffic calming and pedestrian safety activities, especially on Bayshore Blvd <ul style="list-style-type: none"> • Conduct field survey of pedestrian use areas and identify accident-prone locations; • Coordinate with DPT for traffic calming analysis and design concepts. 	Medium	Program Manager	PSS Cmte., Senior Action Network, DPT/MTA	DPT grant funding for study; Prop K funding; Potential developer fee
3. Work with local non-profits to develop more programs for youth <ul style="list-style-type: none"> • Coordinate through local CBOs network 	Medium	PBS Cmte.	VVJET, VVCDC, Weed & Seed	
4. Advocate for a SFPD sub-station (with bilingual officer) on Leland Ave. <ul style="list-style-type: none"> • Begin discussions with SFPD 	Medium	PSS Cmte.	SFPD	
5. Start a neighborhood watch program on Leland Ave. <ul style="list-style-type: none"> • Research information on other neighborhood watch programs; • Consult with SFPD; community outreach. 	Short	PSS Cmte.	SFPD, Weed & Seed, Neighborhood Safety Partnership	
6. Increase police presence on Leland and surrounding areas at night <ul style="list-style-type: none"> • Begin discussions with SFPD 	Short	PSS Cmte.	SFPD	
7. Sidewalk sweeping program <ul style="list-style-type: none"> • Research costs for weekly broom-sweeping services and select potential contractor. 	Medium	MPS Cmte.	Program Manager	Neighborhood Beautification Fund; Potential developer fees

Item/Action	Timing	Lead	Key Support	
Promotion				
1. Organize a street festival <ul style="list-style-type: none"> • Contact MONS for information on other neighborhood street festivals; • Research costs; • Develop potential vendor/participant list. 	Medium	PBS Cmte.	VVPA, Program Manager	Potential developer fees
2. Promoting a theme/media campaign (eg, “The sun rises in Viz Valley”) <ul style="list-style-type: none"> • Theme competition (?); • Prepare marketing materials; • Organize “launch” coordinated with community event (eg, street festival). 	Medium	PBS Cmte.	Program Manager, Small Business Commission	
3. Help businesses decorate for the holidays <ul style="list-style-type: none"> • Outreach to merchants; • Develop donations/fundraising campaign; • Organize volunteers and coordinate logistics. 	Short	PBS Cmte.	VVPA	
4. Have stores put historical photos in windows/vacant storefronts (and promote/organize historical walks) <ul style="list-style-type: none"> • Create photo portfolio; design displays; • outreach to merchants and commercial property owners. 	Medium	Program Manager	VVPA, City Guides	
5. Organize multicultural and inter-generational activities on Hans Schiller Plaza and other places <ul style="list-style-type: none"> • Coordinate through VVPA 	Short	PBS Cmte.	VVPA, Weed & Seed	
6. “Visual merchandising” consultant <ul style="list-style-type: none"> • Research costs; • Outreach to merchants. 	Medium	Program Manager	MOCD	MOCD funding
7. Street banners or other visual markers along Leland Ave <ul style="list-style-type: none"> • Research on other neighborhoods; • Coordinate with other streetscape improvements; • Sponsor design competition (?). 	Medium	PBS Cmte.	Program Manager, MOCD	MOCD funding

Item/Action	Timing	Lead	Key Support	
Economic Development				
1. Recruit new businesses to come to the area <ul style="list-style-type: none"> • Prepare marketing materials; • Encourage property owners to list vacancies in MLS and on SF Prospector; • Coordinate with local commercial leasing brokerages regarding community priorities for business types and criteria for business 	Ongoing	Program Manager	Leasing agent	

attraction; <ul style="list-style-type: none"> • Maintain a business and vacancy inventory. 				
2. Start a weekly/monthly farmer’s market (make sure to integrate the existing businesses)	Medium	PBS Cmte.	VVPA, Program Manager, MOED, DOE	Grant funding for feasibility study
3. Attract or start businesses that provide job training and entrepreneurship opportunities for residents <ul style="list-style-type: none"> • Coordinate through local CBOs network 	Long	Program Manager	VVJET, UCSF, Leasing agent	
4. Start a merchants association <ul style="list-style-type: none"> • Form inaugural formation committee; • Conduct door-to-door recruitment/outreach to businesses; • Establish organization name, logo, initial goals; • Hold bi-monthly storefront meetings. 	Medium	Program Manager	PBS Cmte.	
5. Provide assistance to small businesses on Leland Ave. and Bayshore Blvd. (low-interest loans) <ul style="list-style-type: none"> • Hold workshop for local businesses to introduce available services; • Establish pre-screening process to determine needs for individual businesses; • Create referral service 	Medium	Program Manager	Small business consult, MOCD, API Biz, Bayview Business Resource Center	
6. Encourage businesses to open for 49ers football games <ul style="list-style-type: none"> • Outreach to merchants 	Short	PBS Cmte.	VVPA, Program Manager	
7. Reroute or add bus route to go down Leland <ul style="list-style-type: none"> • Form neighborhood task force; • Begin preliminary discussions with MUNI. 	Medium	Program Manager	MUNI, DPT, Senior Action Network	
8. Develop cooperative advertising <ul style="list-style-type: none"> • Research costs; • Outreach to merchants; • Coordinate with marketing and promotion strategies. 	Medium	Program Manager	Small business consult	
9. Explore ways to improve parking availability (e.g.. ask businesses with parking lots to open them to the public) <ul style="list-style-type: none"> • Conduct parking demand study; • Survey of opportunity sites; • Outreach to merchants and commercial property owners. 	Short	Program Manager	DCP, DPT	Potential developer fees
10. Ensure that a grocery store is brought to the neighborhood <ul style="list-style-type: none"> • Monitor Schlage Lock Site development 	Long	VVPA	DCP, D10 Supe	

Task List by Committee

Maintenance and Public Space (MPS)

- Help businesses clean their storefronts, do graffiti abatement
- Create an anti-litter strategy
- Sidewalk sweeping program
- Put in more trees and pedestrian-scale lighting on the street
- Create bulbouts and textured crosswalks at intersections
- Install a “Welcome to Visitacion Valley” sign and/or other public art
- Ensure there is a physical connection b/w Leland and the Schlage development
- Underground wires
- Ensure that offensive billboards are removed

Public Safety & Security (PSS)

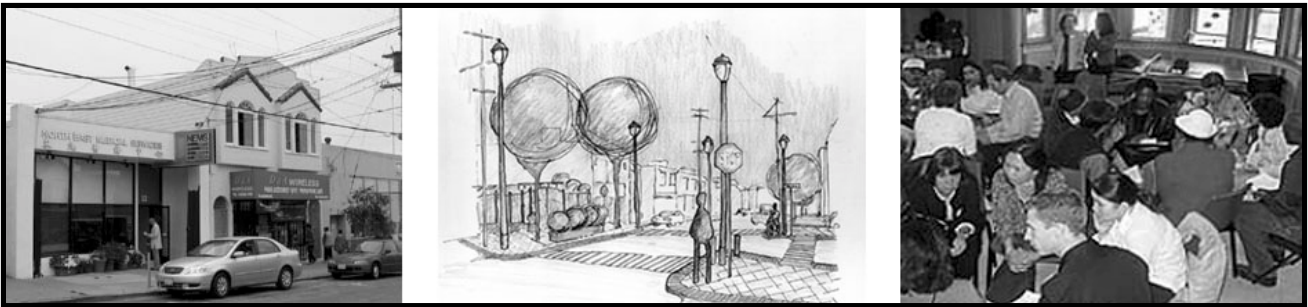
- Explore traffic calming and pedestrian safety activities, especially on Bayshore Blvd
- Ensure that SFPD put a sub-station (with bilingual officer) on Leland Ave.
- Start a neighborhood watch program on Leland Ave.
- Increase police presence on Leland and surrounding areas at night

Promotion and Business Support (PBS)

- Organize a street festival
- Promoting a theme/media campaign (eg, “The sun rises in Viz Valley”)
- Help businesses decorate for the holidays
- Organize multicultural and inter-generational activities on Hans Schiller Plaza and other places
- Street banners or other visual markers along Leland Ave
- Start a weekly/monthly farmer’s market
- Work with local non-profits to develop more programs for youth
- Start a merchants association
- Encourage businesses to open for 49ers football games

Leland Avenue

Business Development Strategy



Prepared by Rick Jacobus
for
The Local Initiatives Support Corporation
and the
San Francisco Mayor's Office of Workforce and Economic Development



Summary

The community's Vision Statement for the Leland/Bayshore Commercial District is a framework for the actions the community aims to take to improve the area. It sets a goal for what the community would like to achieve in the next five years.

“Visitation Valley’s commercial district is a thriving *village* center that is a welcoming and safe environment with shops, restaurants and services providing for a wide variety of affordable daily needs of neighborhood residents. The commercial district is well connected to the surrounding neighborhood and creates gathering places for the community’s diverse population, particularly for its large youth and family population. Public transit is easily accessible for residents to travel between the commercial district and their homes as well as connections to the rest of the city, and reasonable parking opportunities are also available. The entrance to the commercial district is distinctly marked to give a sense of arrival and pride of the Valley. There are people on the street and cafes and retail activity spill out into the public space, taking advantage of Visitation Valley’s sunny weather and enjoying the unique greenery in the neighborhood. The village center is a lively, pedestrian-friendly and visually appealing environment for eating, shopping and socializing during the daytime and into the early evening hours.”

The following list represent types of businesses that are consistent with the communities vision for the future of Leland Avenue, complement the existing mix of businesses, and have the potential to capture local spending that is currently going to businesses outside the neighborhood. The list has been compiled based on feedback from residents and merchants, an analysis of local spending power, an inventory of existing businesses and a study of the types of businesses that are located in comparable commercial districts. The list is not comprehensive; it provides some examples of the types of businesses that might fit in well on Leland Avenue.

Business Attraction Target List

- **Books and Music:** including bookstores and music/CD stores as well as newsstands.
- **Florists**
- **Shoe Stores**
- **Limited Service Eating Places:** Including fast food restaurants, take out restaurants, pizzerias, bagel bakeries, delis and sandwich shops, juice bars, coffee shops, cafes/internet cafés, doughnut shops, and ice cream parlors.
- **Health and Personal Care:** Includes drug stores/pharmacies as well as beauty supply stores, optical/eyeglass stores and stores that sell nutritional supplements.
- **Specialty Food Stores:** includes meat markets, fish markets, produce markets, bakeries, and candy stores.

- **Clothing Stores**
- **Furniture Stores**
- **Used Merchandise Stores**
- **Grocery Stores:** Including supermarkets, Small groceries or ethnic markets
- **Sporting Goods/Hobby/Musical Instruments:** Including toy stores, hobby stores, game stores, video game stores.
- **Video stores**
- **Street Front Offices:** Including travel agency, insurance agent, and dental office
- **Fitness Studios:** including martial arts studios, yoga studios and gyms

Existing Businesses on Leland Avenue

In July of 2004 Community volunteers conducted a walking survey of the 000-200 blocks fo Leland Avenue and the 2200-2600 blocks of Bayshore Blvd. They identified 52 storefront businesses with few obvious business clusters. The full inventory is attached. Of these 52 storefronts, 14 contain retail businesses selling goods including 6 food stores or markets and 2 home improvement businesses. In addition, there are 5 restaurants and 25 other service businesses including 6 laundries/drycleaners, 4 auto service businesses and two banks. Volunteers identified 14 vacant storefronts and 6 vacant lots in the business district. Twenty-one percent of existing storefront space is vacant.

Community stakeholders report that there is high turnover in the storefronts along Leland avenue with businesses regularly closing but being replaced by new businesses. The high turnover rate, high vacancy rate and number of significant vacant parcels indicate that the area could benefit from a coordinated effort to attract new retail businesses. New businesses will have a variety of location choices.

Available Space

Table 1: Opportunity Sites

Parcel #	Business Address	Sq Ft	Condition of space
6250024	107 Leland Ave	1200	Fair
6248009	30 Leland Ave	1000	Good
6250021	129 Leland Ave	300	Good
6246051	200 Leland	600	Poor
6248010	34 Leland Ave	1500	Poor
6249016	15 Leland Ave	1000	Poor
6249017	9 Leland	600	Poor
6247005	116 Leland Ave	800	Unknown
6247007	128 Leland Ave	500	Unknown
6247013	156 Leland Ave	150	Unknown
6247015	166 Leland Ave	500	Unknown
6249003	empty lot		
6249019	2434 Bayshore Blvd	800	Poor
6249022	2450 Bayshore Blvd	800	Poor
6249023	2458 Bayshore Blvd	1200	Poor
	29 Leland Ave	1000	
	2159 Bayshore Blvd	1300	poor

Competing Destinations

The Leland Bayshore Revitalization Steering Committee, with support from LISC, Urban Solutions and Asian Neighborhood Design, conducted several community meetings which included discussions about the kinds of businesses that residents and merchants would like to see locate on Leland Avenue. Community members conducted an informal survey, interviewing a total of 13 individuals about where they shop and why. While the results are far from scientific, they provide a rough sense of the retail destinations that Leland Avenue may be competing with. Many residents indicated that they shop in

Bernal Heights, Chinatown/Downtown, Potrero Hill and San Bruno Avenue. Stonestown Mall and Serramonte were popular destinations for non-food retail. The most frequently cited reasons for selecting the locations identified were reasonable prices and good selection of products. A summary of the survey results is attached.

Table 2: Competing Retail Destinations

Neighborhood Tally	Food	Dine / Entertainment	Non-Food	Spend Most Time
Bernal Heights	xx	xxx	xxx	xx
Ferry Building	x			
Chinatown / Downtown	xxx	x	xxxx	xx
Sunset	x	xx		
Richmond	x			
Potrero Hill	xxx	xx	xxx	
Portola Ave	x			
San Bruno	xxx	xx		x
Bayview	x		x	
Mission	x	x		x
Fillmore	x	x	x	x
Glen Park		x		x
Genevea		x		
North Beach		xx		
Serramonte		x	xxxx	
Colma		x	xxx	
Daly City		x	x	
Milipitas		x		
S. Bay		x		
Vis Valley				xx
Marina			x	
Stonestown			xxxx	
Hills Dale			x	

Desired Businesses

Participants in the community meetings were asked to rank a number of general features intended to serve as potential criteria for identifying “Positive” qualities for businesses that might locate in the district. Each quality was ranked on a scale from 1 to 5 with 5 being the most desirable. The average rankings sorted from highest to lowest are presented in the table below. The tool used to collect these responses is attached. In general community members expressed a desire to attract businesses that would improve the appearance of the street, serve local residents and be open in the evenings and on weekends.

Table 3: Business Attraction Criteria

Rating	Proposed Criteria
4.9	Expresses intention to keep area/neighborhood clean
4.5	Attracts a more affluent clientele
4.5	Attracts neighborhood people
4.07	Store is open evenings and weekends
4	Socially responsible products offered
3.83	Has money to do renovations if needed
3.76	expresses interest in working with community
3.63	Owner lives in or has ties to the community
3.53	Attracts people from outside the neighborhood
3.46	Business does not threaten existing businesses
3.45	Is family-run, independent
3.09	Provides parking
3.09	Is a new business/entrepreneur
3.08	Is an established business
3.08	Is an minority- or woman-owned business
2.75	Has a regional or nationally-known name and reputation
2.45	Signage and service in language other than English
1.8	Does not attract an affluent clientele

Community members were asked to identify business types that they were especially interesting in seeing open on in the neighborhood.

The top suggestions were:

- Supermarket
- Cafes/Coffee shop
- Restaurants
- Hardware store/key shop
- Video store
- Ice cream shop
- shoe repair
- Youth organization/hang out

Economic Analysis

In addition to seeking input from community members, LISC conducted a demographic and economic analysis of publicly available data in order to evaluate the likelihood that the neighborhood trade area could support additional businesses. LISC produced a Neighborhood Market Snapshot (attached) which provides a wealth of data on the trade area surrounding the Leland Avenue Business District based on information obtained from ESRI Businesses Information Solutions¹.

Trade Area Definition

LISC analyzed the demographics and spending power for residents located within a 2-minute drive time² area surrounding the intersection of Leland Avenue and Bayshore Blvd. The area represents a rough approximation of the area from which Leland avenue businesses might potentially draw customers. It is important to note that many of the current businesses do not draw customers from such a large area and parts of the 2-minute trade area are beyond what residents see as the Visitation Valley neighborhood. The demographics for this larger trade area are slightly different from the demographics of the area immediately surrounding Leland Avenue.



Map 1: Two-minute drive time trade area.

¹ The ESRI report is based primarily on data provided by the census bureau and the Bureau of Labor Statistics annual Consumer Expenditure Survey. While these are among the best publicly available data sources, neither provides an entirely accurate picture at the neighborhood scale. The Census is known to slightly undercount the population, especially in low-income urban areas, which leads to a slight underestimate of local spending power. The Consumer Expenditure Survey is based on a fairly small single national sample of consumers and therefore, does not fully capture differences in behavior between consumers in different neighborhoods. In addition, ESRI has, based on certain statewide and national trends, projected the neighborhood population forward to 2003 and 2008. Taken together, this data should be understood as providing an educated “best guess” about the local population and their spending on different goods and services. Detailed surveying of a large sample of local residents would be necessary to develop more accurate estimates.

² The two-minute drive time zone is estimated by ESRI assuming that a driver was moving at a constant speed without any stops.

Demographics

Table 4: Demographic trends for 2-minute trade area

Summary	2000	2003	2008
Population	23,103	23,994	25,085
Households	5,841	5,988	6,226
Families	4,767	4,899	5,102
Average Household Size	3.94	3.99	4.01
Owner Occupied HUs	3,966	4,104	4,303
Renter Occupied HUs	1,875	1,885	1,923
MedianAge	35.0	35.8	37.2

Source: Unless otherwise noted all data is from ESRI Business Information Solutions

Asian Americans are the predominant ethnic group living in the area but they represent only a slight majority. The remaining population is quite diverse with white, African-American, and Latino populations each making up more that 10 percent of the total. Demographic projections for 2008 indicate that the Asian population is expected to grow while the African-American population is expected to continue to shrink.

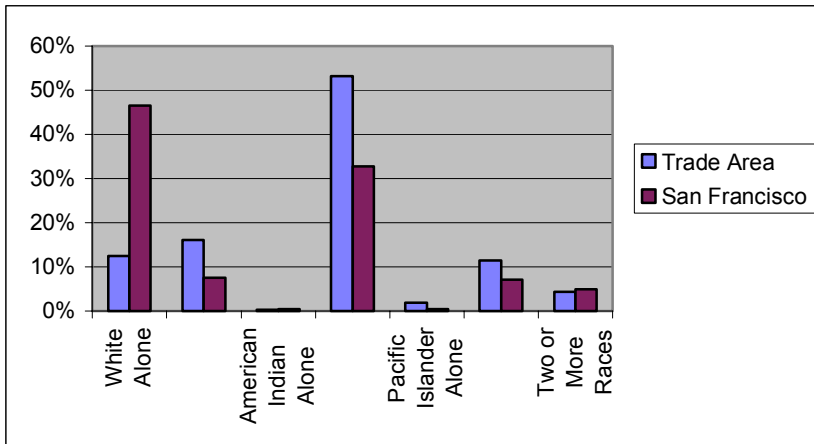


Chart 1: Ethnic composition relative to City

37% of households have net worth in excess of \$250,000. Presumably much of this wealth is in the form of home equity. 68% of households own their homes – this is a very high number for San Francisco where the average is 35%.

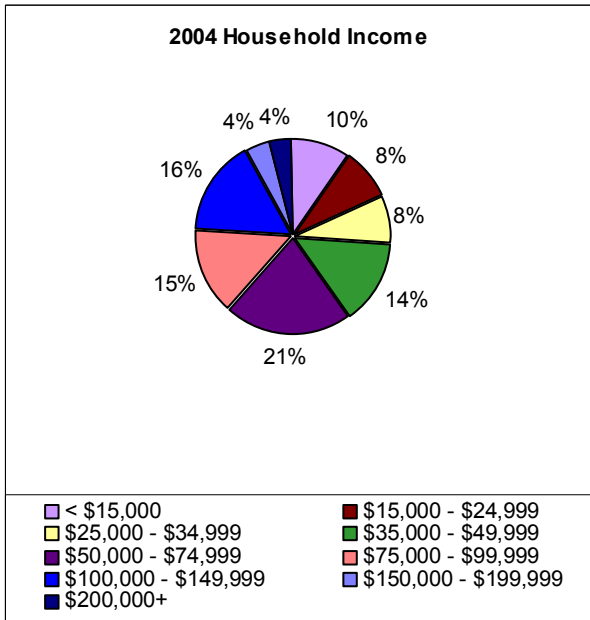


Chart 2: Distribution of Household Income

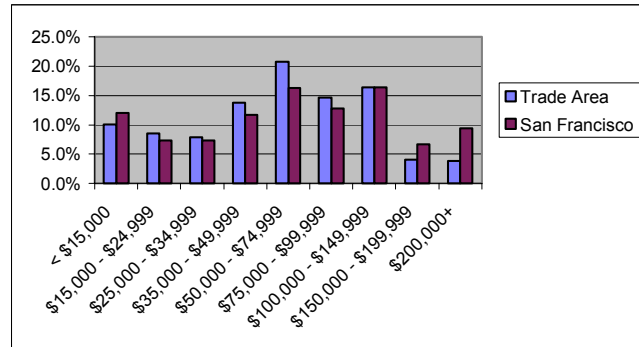


Chart 3: Household income relative to City

While most households earned close to the median income of \$52,605 in 2000, 22% earned less than \$25,000. Relative to the rest of San Francisco, Visitation Valley has fewer very poor households and far fewer wealthy households but a larger percentage of low and moderate-income households.

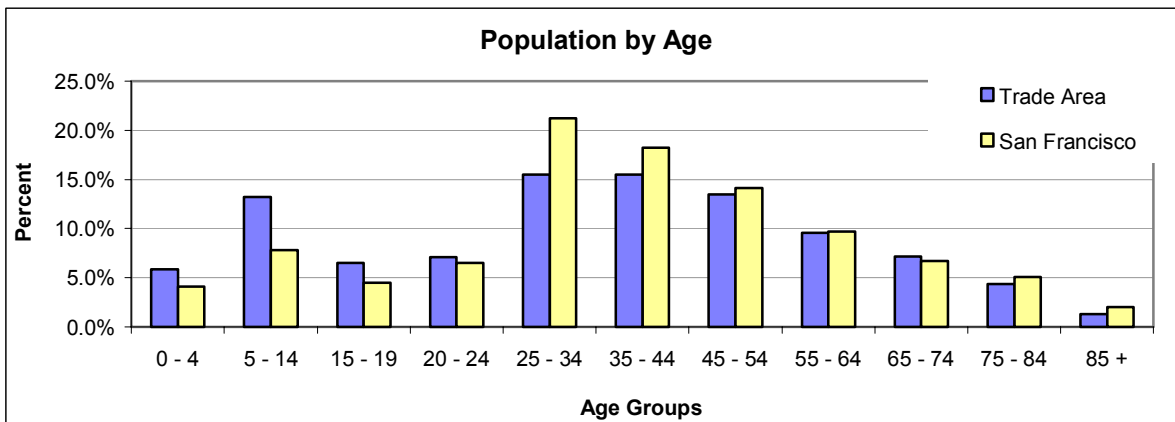


Chart 4:

Distribution by age group

The average household has almost 4 people – The Citywide average is only 2.3. Overall Visitation Valley has some of the largest households in the city. Children make up a much larger percentage of the population in the neighborhood than the citywide average. This is not a neighborhood populated with large numbers of young adults or single elders. Most adults are in their late 30s or 40s. Relative to the rest of the city there are few adults in their late 20s/early 30s.

Spending Power Analysis

ESRI estimates that consumers within the two-minute trade area spend a total of \$183 million annually on retail businesses including food and drinking businesses. There is only \$90 million of annual sales from these businesses located within the trade area. The remaining \$93 million is considered “leakage” – money that neighborhood residents presumably spend outside the neighborhood. The leakage factor (34) is an indication of the extent to which demand exceeds supply. A leakage factor of 100 would mean that all sales were leaking out of the neighborhood. A leakage factor of 0 would mean that supply and demand were exactly matched. A negative leakage factor indicates that the area is selling more goods/services than is demanded by local residents – ie people are coming in to the area from outside to shop.

Table 5: Spending power summary, Visitation Valley 2-minute drive time area

Category	Supply (Retail Sales)	Demand (Retail Potential)	Leakage/Surplus	Number of Businesses
Total Retail Trade and Food & Drink	\$90,106,693	\$182,973,141	34	77
Total Retail Trade (NAICS 44-45)	\$86,366,721	\$155,505,487	28.6	59
Total Food & Drink (NAICS 722)	\$3,739,972	\$27,467,654	76	18

Table 6: Selected business categories with leakage factors above 50.

Category	Supply (Retail Sales)	Demand (Retail Potential)	Leakage/Surplus	Number of Businesses
NAICS 7221: Full-Service Restaurants	\$0	\$8,376,290	100.0	0
NAICS 4541: Electronic Shopping and Mail-Order Houses	\$0	\$8,968,559	100.0	0
NAICS 4529: Other General Merchandise Stores	\$0	\$6,898,556	100.0	0
NAICS 4521: Department Stores (Excluding Leased Depts.)	\$0	\$5,447,003	100.0	0
NAICS 4483: Jewelry, Luggage, and Leather Goods Stores	\$0	\$1,540,176	100.0	0
NAICS 4482: Shoe Stores	\$0	\$1,553,699	100.0	0
NAICS 4411: Automobile Dealers	\$1,318,188	\$33,821,349	92.5	1
NAICS 4543: Direct Selling Establishments	\$47,310	\$1,060,918	91.5	0
NAICS 4531: Florists	\$21,626	\$344,959	88.2	0
NAICS 7224: Drinking Places (Alcoholic Beverages)	\$222,922	\$2,795,371	85.2	1
NAICS 7223: Special Food Services	\$441,970	\$2,910,865	73.6	1
NAICS 4512: Book, Periodical, and Music Stores	\$421,926	\$2,210,969	67.9	2
NAICS 7222: Limited-Service Eating Places	\$3,075,080	\$13,385,128	62.6	16
NAICS 4533: Used Merchandise Stores	\$234,073	\$784,668	54.0	0

The attached Retail Marketplace Report provides an estimate for total sales, total consumer demand, a leakage factor and a count of the number of businesses within the trade area for each of 42 selected common retail categories. Table 6 presents the categories for which the leakage factor is greater than .5 indicating that a high percentage of the spending by local residents is occurring outside of the trade area. The leakage analysis indicates that the area is already well served by liquor stores, home furnishing stores and sporting goods stores. However according to the ESRI data there are no shoe stores or jewelry stores and only two book store in the trade area with very limited total sales. Trade Area residents are estimated to spend a total of \$1.5 million per year in shoe stores, \$2.2 million in book, periodical and music stores and \$1.5 million in jewelry, luggage and leather goods stores.

According to this data, there are currently no full service restaurants in the area in spite of the estimated \$8.3 million that trade area residents spend in this type of establishment each year. All together the area is significantly underserved by eating places. Even though there are 17 limited service eating places identified they only report sales of \$3 million while area consumers report spending over \$13 million. All together area residents spend over \$27 million in restaurants and bars but only \$3.7 million of that total is spent in the neighborhood.

While the trade area is underserved in most categories there are a handful of categories with negative leakage factors indicating that sales from local businesses exceed the local demand. These include Gas stations, office supplies, lawn and garden supplies and home furnishings.

Table 7: Business categories with sales that exceed local demand

Category	Supply (Retail Sales)	Demand (Retail Potential)	Leakage/Surplus	Number of Businesses
NAICS 4539: Other Miscellaneous Store Retailers	\$3,187,203	\$2,213,013	-18.0	4
NAICS 447/NAICS 4471: Gasoline Stations	\$22,317,887	\$14,241,073	-22.1	2
NAICS 4511: Sporting Goods/Hobby/Musical Instrument Stores	\$5,471,014	\$2,573,662	-36.0	4
NAICS 4532: Office Supplies, Stationery, and Gift Stores	\$2,849,319	\$1,256,789	-38.8	4
NAICS 4442: Lawn and Garden Equipment and Supplies Stores	\$907,907	\$396,039	-39.3	1
NAICS 4422: Home Furnishings Stores	\$6,722,634	\$2,668,403	-43.2	4

Comparative Void Analysis

LISC frequently finds significant retail leakage in low- or moderate-income urban neighborhoods. It is not realistic to expect urban neighborhoods to capture all of the retail spending of neighborhood residents. Residents have many choices and most people seem to prefer to shop in a number of different environments. Nonetheless, it is clear that some neighborhoods do a better job than others of capturing local spending – especially in certain key categories.

The overall retail leakage numbers by themselves are not particularly useful to the development of a business development strategy for the neighborhood because they lack context. We may know that x% of the trade area’s spending power in the take out food category is being spent outside of the trade area but what we don’t know is how likely it is that that figure would change if an additional take out restaurant were to open in the area. Ultimately we would like to know which of the very many categories in which there is clear leakage represent opportunities for new businesses to fill an unmet local need and which are simply reflections of the nature of retail patterns in 21st century urban America.

Comparative void analysis provides a rough tool to point us in this direction. In order to provide a context for the Leland Avenue analysis, LISC identified a set of 13 comparison neighborhood commercial districts. All of the comparison districts are located in or near low-income communities. Most are located in San Francisco, but because Visitation Valley is unlike most other San Francisco neighborhoods, we also selected several East Bay districts.

Name	Intersection	City
Excelsior	Mission and Ocean	San Francisco
Potrero	18th and Connecticut	San Francisco
24th Street	24th and Noe	San Francisco
Clement St	6th and Clement St.	San Francisco
Temescal	Telegraph and 51st	Oakland
Piedmont Ave.	Piedmont and 40th	Oakland
Grand Ave	Grand and Mandana	Oakland
Bernal Heights	Cortland and Prospect	San Francisco
Bayview	Third and Oakdale	San Francisco
Lakeshore	Lakeshore and Mandana	Oakland
Fruitvale	35th and International	Oakland
Downtown Richmond	Marina way and Macdonald Avenue	Richmond
San Bruno	San Bruno Ave and Woolsey St	San Francisco

Demographic Comparison

No two neighborhoods are exactly alike. The comparison neighborhoods are all quite different from one another in terms of their racial and age make up, etc. Table 8 shows the variation in population, number of households, disposable income and per capita income. The two-mile radius surrounding Leland and Bayshore has slightly fewer people than the average for the other districts but it has significantly fewer households – due to the large family sizes in the neighborhood. The neighborhoods were selected in part based on their having similar household income levels. The table shows that the group as a whole has a median household disposable income that almost exactly matches the Visitation Valley median.

Table 8: Selected demographics for comparison neighborhoods

District	2004 Population	2004 Households	2004 Median Disposable Income	2004 Per Capita Income
Visitation Valley	115,692	31,793	46,991	20,745
Excelsior	216,441	69,446	54,617	32,310
Potrero	182,008	80,949	40,025	37,187
Temescal	141,207	65,880	37,711	35,282
Noe Valley	262,528	109,974	54,319	45,723
Grand Ave	155,808	68,910	36,791	34,346
Clement S	186,603	86,808	56,843	59,487
Piedmont	144,460	68,095	38,289	38,143
Lakeshore	156,758	67,557	37,188	33,673
Downtown Richmond	90,568	29,116	35,378	18,838
San Bruno	160,610	48,046	48,794	24,922
Fruitvale	159,691	51,137	35,908	19,536
Bayview	130,484	40,727	49,213	27,807
Bernal Heights	238,934	88,029	53,526	38,166
Average	167,271	64,748	44,685	33,298

Note: Demographics for the area within a 2-mile radius of each district

In order to help answer the question “how much leakage is normal for a neighborhood like Visitation Valley” we compared the leakage factors for each retail category across all of the districts. For each district, including Visitation Valley, we defined a trade area based on a 2-mile radius³ from the district’s key intersection. We then looked at the total sales, consumer demand, leakage factor and number of businesses for each retail category for each district in order to identify areas of commonality and difference.

Retail Sales Comparison

While each of the comparison trade areas covers the same amount of land (2-mile radius) there is a wide variety among them in terms of the total amount of retail activity taking place within each area. There are fewer businesses reporting much less total sales activity within two-miles of Leland and Bayshore than within the trade areas of the other districts. On average the other districts are generating almost 2 billion dollars (\$1,883,836,622) in sales each. Visitation Valley generates only \$839,043,075. However, on a per household basis, Visitation Valley looks very much like the comparison neighborhoods. Lower housing density and proximity to the Bay means that fewer people live within 2 miles of Leland avenue but the sales per household for the area is very close to the average per household for the other areas.

Table 9 shows the sales per household for retail goods, food and Drink and both together for each area. The table also shows the average for all the sites and the degree of variation⁴ among sites. The sites collect an average of \$28,138 in sales for retail and food and drink together give or take approximately \$13,664. Leland Avenue’s sales of \$26,391 falls right in the middle of the pack. On the other hand, Potrero’s \$73,277 puts it more than three standard deviation’s above the average pointing to the

³ Note that for this analysis we used a simple 2-mile radius trade area rather than the 2-minute drive time area used above. This allows us to evaluate the relative demand density of the different neighborhoods; the two minute areas are each different sizes which makes a side by side comparison difficult.

⁴ One standard deviation from the mean.

presence of several large retailers with citywide draw in Potrero that are absent from the other neighborhoods.

Comparing the total retail sales (on both a per household and per square mile basis) for each business type, points to several categories where Leland is very unlike the comparison districts either because of an unusual concentration of sales or, more frequently, because of a conspicuous lack of retail sales of a type that is common in the other neighborhoods.

Table 9: Total trade area sales per household

	Total Retail Trade and Food & Drink	Total Retail Trade	Total Food & Drink
Visitation Valley	\$26,391	\$23,497	\$2,894
Excelsior	\$13,086	\$10,276	\$2,810
Potrero	\$73,277	\$61,349	\$11,928
Temescal	\$30,609	\$27,801	\$2,808
Noe Valley	\$26,344	\$21,108	\$5,236
Grand Ave	\$25,960	\$22,821	\$3,139
Clement Street	\$23,426	\$17,073	\$6,353
Piedmont	\$27,013	\$24,327	\$2,687
Lakeshore	\$25,337	\$22,052	\$3,285
Downtown Richmond	\$20,812	\$19,754	\$1,058
San Bruno	\$23,989	\$20,555	\$3,434
Fruitvale	\$21,814	\$20,318	\$1,497
Bayview	\$29,297	\$24,086	\$5,211
Bernal Heights	\$26,578	\$21,659	\$4,919
Average	\$28,138	\$24,048	\$4,090
Variation	\$13,664	\$11,464	\$2,695

In order to evaluate the relative opportunity for each type of business, we compared total sales for businesses in Visitation Valley along side the average sales for all the comparison districts and the standard deviation among them for each retail category. The standard deviation is a statistic that provides a sense of how far the figures for each district are spread out around the average. For example, the Visitation Valley trade area sees about 3.5 million dollars in annual sales in furniture stores and the same amount annually in bookstores. The average district in our peer group sells about \$30 million in each of these categories. Visitation Valley clearly underserved by both types of stores but which is the better opportunity? Both categories have an average of about \$30 million but the variation among districts in furniture store sales is much greater than in books. Some districts sell a lot in furniture stores (the top in our group is \$156 million) and some sell very little (the bottom is \$2 million). Bookstore sales are more consistent between neighborhoods (ranging from \$80 million to \$2.5 million) While both categories have average sales of about \$30 million, the standard deviation for bookstores is \$28 million

while for furniture stores it is \$40 million. So therefore, even though in both categories spending in Visitation Valley is 1/10th of the average, in this relative sense Visitation Valley is further from the average sales (relative to its peers) in books than in furniture. While the list of categories where the total value of Visitation Valley sales is farthest from the average will tend to include many where there is simply huge variation among the peer group, the list of categories where Visitation Valley sales furthest below the average *as a percentage of the standard deviation* for that particular category will only include those business types where the other districts are fairly similar to each other and Visitation Valley is relatively unusual. Taken together with other factors, this might be an indicator of the best real business opportunities in Visitation Valley.

Table 10 shows the results for the most promising ten categories identified by this analysis of relative sales. The list ranked according to the degree to which spending in Visitation Valley is falls below the average for all districts as a percentage of the standard deviation among districts. The top of the list represents the greatest opportunity according to this measure.

Table 10: Retail categories with low total sales relative to comparison districts

Category	Visitation Valley	Average	Variation
NAICS 447/NAICS 4471: Gasoline Stations	75,361,522	140,760,267	31,322,826
NAICS 4451: Grocery Stores	95,376,126	243,732,355	98,337,882
NAICS 446/NAICS 4461: Health & Personal Care Stores	34,372,529	127,274,739	69,048,340
NAICS 4453: Beer, Wine, and Liquor Stores	16,987,213	35,587,696	16,229,393
NAICS 4413: Auto Parts, Accessories, and Tire Stores	9,674,262	25,335,782	14,326,409
NAICS 4452: Specialty Food Stores	9,001,643	27,272,217	17,147,872
NAICS 4512: Book, Periodical, and Music Stores	3,504,643	32,517,713	28,022,684
NAICS 4543: Direct Selling Establishments	1,980,741	6,601,720	4,657,370
NAICS 4531: Florists	1,260,339	4,903,398	3,696,974
NAICS 7222: Limited-Service Eating Places	26,512,513	130,990,515	117,907,406

What is striking about this table is that several of the categories are the ones in which Visitation Valley was shown to have a negative leakage. For example, the top item, gas stations is a category in which Visitation Valley is already selling more than is being purchased by local residents. People are coming into the neighborhood to buy gas. However, this is true for all of the other neighborhoods to an even greater extent. If Visitation Valley were to sell twice as much gasoline it would not be unusual relative to these other neighborhoods.

Similarly, you don't see many of the categories with the greatest leakage factors (full service restaurants, department stores, auto dealerships, etc.) on this list because, on average, the comparison neighborhoods are lacking these retailers also.

Because Visitation Valley has fewer households than most of the comparison neighborhoods we cannot make too much of the differences in total retail spending in any category, but many of the same categories remain relevant when we look at spending per household. Table 11 shows the categories in which the sales per household are relatively farthest below the average for other neighborhoods.

Table 11: Retail categories with low per household sales relative to comparison districts

Category	Visitation Valley	Average	Variation
NAICS 446/NAICS 4461: Health & Personal Care Stores	1,081	1,877	593
NAICS 4512: Book, Periodical, and Music Stores	110	431	277
NAICS 4451: Grocery Stores	3,000	3,725	708
NAICS 445: Food & Beverage Stores	3,817	4,683	898
NAICS 4531: Florists	40	70	38
NAICS 7222: Limited-Service Eating Places	834	1,821	1,254
NAICS 7224: Drinking Places (Alcoholic Beverages)	121	438	437
NAICS 4421: Furniture Stores	111	424	463
NAICS 4452: Specialty Food Stores	283	399	174
NAICS 4533: Used Merchandise Stores	96	181	129

In particular notice that, while our leakage analysis showed that supply and demand were relatively balanced for Grocery stores in the Visitation Valley trade area, relative to the comparison neighborhoods, Visitation Valley is selling less per household by a very significant margin. While the comparison data set is limited and far from scientific, this may indicate an opportunity for grocery stores (and the other types of retail in this list) in Visitation Valley.

Leakage Comparison

To some extent the total sales per household is a function of the household incomes. An area may have relatively low sales per household either because of an unmet market opportunity or simply because people in the area spend less per household on the type of retail in question – and likely will continue to do so even if new stores were to open. Comparing the leakage factors between the target neighborhoods should account for this difference in the spending power of each neighborhood’s residents.

Table 12 shows the retail categories for which the Visitation Valley leakage factors are highest relative to the other neighborhoods. For example, while Visitation Valley has a high leakage factor for book stores (more than half of local resident spending on this category is going outside the area), the other neighborhoods tend to have little or no leakage in this category. Note that the categories in this list are not all categories with high leakage factors. The Visitation Valley trade area is capturing nearly all of the local spending on Florists but it ranks fourth from the top of this list because the other neighborhoods tend to have more sales in their local Florists than can be accounted for by local residents (ie. they tend to have negative leakage). This indicates that in spite of the low leakage, a florist might succeed in Visitation Valley.

With the exception of drinking places (bars) and liquor stores, this list, not coincidentally, looks very much like the community wish list. These are the businesses that other similar communities have that Visitation Valley is lacking.

Table 12: Categories with leakage factors that are significantly higher than comparison districts

Category	Visitation Valley	Average	Variation
NAICS 7224: Drinking Places (Alcoholic Beverages)	53.70	6.04	27.45
NAICS 4512: Book, Periodical, and Music Stores	52.80	2.96	30.12
NAICS 4482: Shoe Stores	71.80	30.76	31.92
NAICS 4531: Florists	18.90	(10.44)	23.49
NAICS 7222: Limited-Service Eating Places	45.80	20.84	20.75
NAICS 4483: Jewelry, Luggage, and Leather Goods Stores	56.20	11.96	39.23
NAICS 446/NAICS 4461: Health & Personal Care Stores	11.70	(9.32)	19.08
NAICS 4481: Clothing Stores	47.00	16.30	29.68
NAICS 4421: Furniture Stores	60.80	24.78	36.45
NAICS 4452: Specialty Food Stores	41.40	25.72	19.96
NAICS 4521: Department Stores (Excluding Leased Depts.)	97.60	67.62	42.13
NAICS 4533: Used Merchandise Stores	13.70	(3.44)	27.32
NAICS 4451: Grocery Stores	22.30	17.27	10.38
NAICS 4411: Automobile Dealers	55.40	39.48	44.47
NAICS 4413: Auto Parts, Accessories, and Tire Stores	35.50	28.17	26.44
NAICS 4532: Office Supplies, Stationery, and Gift Stores	12.90	8.89	25.55

Business Inventory Comparison

LISC compared the inventory of businesses conducted by neighborhood volunteers with similar inventories compiled by UC Berkeley students⁵ for several of the comparison districts in order to evaluate whether there were retail store types that were common in similar neighborhoods that were not present on Leland Avenue. The analysis focuses exclusively on businesses located on the main commercial corridors within the primary business district and does not take into account the supply of businesses in other locations within the trade area of each district.

⁵ Bay Area Neighborhood Commercial Districts: A Pilot Study, Abby Thorne-Lyman and Sarah Treuhaft, student project for Professor Karen Chapel, UC Berkeley, Department of City and Regional Planning, Spring 2003.

Category		Leland		Bernal Hts		Bayview		Clement		Excelsior		Fruitvale		Lakeshore		Temescal		Total
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	%
Chain stores	Major supermarket			2	4.7%	5	4.0%	7	2.4%	8	2.8%	21	13.8%	25	25.5%	7	4.2%	6.2%
	Major drugstore									1	0.3%			1	1.0%			0.2%
											1	0.3%			1	1.0%	2	1.2%
Retail	Auto sales					1	0.8%	2	0.7%	5	1.7%	3	2.0%					
	Bookstores/newsstands					2	1.6%			1	0.3%	1	0.7%			1	0.6%	0.4%
	Cellular	1	1.9%			1	0.8%	2	0.7%			1	0.7%	1	1.0%	1	0.6%	0.6%
	Clothing/shoes	1	1.9%			4	3.2%	7	2.4%	9	3.1%	23	15.1%	5	5.1%	4	2.4%	4.4%
	Electronics							6	2.1%	1	0.3%	5	3.3%	1	1.0%	4	2.4%	1.4%
	Ethnic market	1	1.9%					7	2.4%	2	0.7%							
	Flowers/cards/gifts			4	9.3%	1	0.8%	17	5.9%	6	2.1%	2	1.3%	6	6.1%	3	1.8%	3.2%
	Food market	5	9.6%	2	4.7%	4	3.2%	10	3.5%	11	3.8%	4	2.6%	3	3.1%	3	1.8%	3.5%
	Hardware					1	0.8%	2	0.7%			1	0.7%			4	2.4%	0.7%
	Hobby/craft							2	0.7%	7	2.4%	3	2.0%	2	2.0%	1	0.6%	1.2%
	Home	2	3.8%	2	4.7%	4	3.2%	8	2.8%	12	4.2%	3	2.0%	2	2.0%	5	3.0%	3.1%
	Jewelry							1	0.3%	1	0.3%			1	1.0%	1	0.6%	0.3%
	Liquor					7	5.6%	1	0.3%	3	1.0%	3	2.0%	1	1.0%	2	1.2%	1.4%
	Music					1	0.8%	2	0.7%	2	0.7%	3	2.0%	1	1.0%	1	0.6%	0.8%
	Pharmacy	1	1.9%			1	0.8%	1	0.3%	3	1.0%			1	1.0%	2	1.2%	0.7%
	Produce			1	2.3%	3	2.4%	6	2.1%	6	2.1%	3	2.0%	1	1.0%			
	Used/thrift/discount	2	3.8%			3	2.4%	4	1.4%	2	0.7%	4	2.6%			9	5.4%	2.0%
Video	1	1.9%	2	4.7%			2	0.7%	2	0.7%			1	1.0%	3	1.8%	0.9%	
Other			1	2.3%	4	3.2%	2	0.7%	3	1.0%	3	2.0%			6	3.6%	1.6%	
Subtotal	14	26.9%	12	27.9%	37	29.4%	82	28.4%	76	26.3%	62	40.8%	26	26.5%	50	29.8%	29.5%	
Services	Auto repair	4	7.7%			3	2.4%	1	0.3%	8	2.8%	10	6.6%	2	2.0%	3	1.8%	2.5%
	Bank	2	3.8%	1	2.3%	3	2.4%	5	1.7%	3	1.0%	2	1.3%	3	3.1%	3	1.8%	1.8%
	Check cashing/money wiring					3	2.4%			4	1.4%	7	4.6%	1	1.0%	1	0.6%	1.3%
	Copies					1	0.8%	1	0.3%	1	0.3%							
	Gas station	2	3.8%							2	0.7%	1	0.7%	2	2.0%			
	Hair/nails/beauty	5	9.6%	6	14.0%	13	10.3%	12	4.2%	28	9.7%	14	9.2%	13	13.3%	19	11.3%	9.0%
	Hotel/motel								2	0.7%					2	1.2%	0.3%	
	Laundry/dry cleaning	6	11.5%	2	4.7%	2	1.6%	2	0.7%	5	1.7%			4	4.1%	5	3.0%	2.1%
	Medical offices	3	5.8%					37	12.8%	18	6.2%	4	2.6%	3	3.1%	9	5.4%	6.1%
	Photo							3	1.0%	1	0.3%	1	0.7%	3	3.1%	2	1.2%	0.8%
	Other business services					12	9.5%	10	3.5%	19	6.6%	1	0.7%	8	8.2%	7	4.2%	4.7%
	Other services to individuals	2	3.8%	4	9.3%	9	7.1%	27	9.3%	39	13.5%	9	5.9%	5	5.1%	18	10.7%	9.3%
	Repair shops							2	0.7%	1	0.3%	4	2.6%	2	2.0%	2	1.2%	0.9%
	Storage					1	0.8%			2	0.7%							
Travel agency			1	2.3%			5	1.7%	4	1.4%								
Subtotal	24	46.2%	14	32.6%	47	37.3%	105	36.3%	137	47.4%	53	34.9%	46	46.9%	71	42.3%	40.8%	
Dining/Entertainment	Bakery/bagels					1	0.8%	7	2.4%	3	1.0%	1	0.7%	4	4.1%	2	1.2%	1.5%
	Bars			2	4.7%	2	1.6%	5	1.7%	6	2.1%	2	1.3%	2	2.0%	4	2.4%	1.9%
	Café			1	2.3%	1	0.8%	8	2.8%	2	0.7%	1	0.7%	3	3.1%	3	1.8%	1.6%
	Deli	1	1.9%	1	2.3%					3	1.0%			2	2.0%	2	1.2%	0.7%
	Ethnic restaurant	2	3.8%	2	4.7%	4	3.2%	25	8.7%	8	2.8%	10	6.6%			5	3.0%	4.6%
	Asian			1	2.3%	2	1.6%	23	8.0%	3	1.0%					5	3.0%	2.8%
	Mexican/other Spanish					2	1.6%	1	0.3%	5	1.7%	10	6.6%					
	Fast food	1	1.9%	1	2.3%	1	0.8%			7	2.4%	6	3.9%	3	3.1%	6	3.6%	2.1%
	Ice Cream/candy							2	0.7%	1	0.3%	3	2.0%	2	2.0%			
	Non-ethnic restaurant	1	1.9%	2	4.7%	7	5.6%	16	5.5%	15	5.2%	2	1.3%	3	3.1%	13	7.7%	4.8%
	Physical fitness			2	4.7%	1	0.8%	1	0.3%					3	3.1%	2	1.2%	0.7%
Other	1	1.9%							1	0.3%								
Subtotal	6	11.5%	11	25.6%	17	13.5%	64	22.1%	46	15.9%	25	16.4%	22	22.4%	37	22.0%	18.7%	
Community	Civic/religious	7	13.5%	5	11.6%	11	8.7%	5	1.7%	7	2.4%	8	5.3%	1	1.0%	8	4.8%	4.3%
	Educational (adult)					1	0.8%	2	0.7%	1	0.3%	1	0.7%	2	2.0%	1	0.6%	0.7%
	School/library/youth center	1	1.9%			4	3.2%			8	2.8%	2	1.3%	1	1.0%			
	Subtotal	8	15.4%	5	11.6%	16	12.7%	7	2.4%	16	5.5%	11	7.2%	4	4.1%	9	5.4%	6.2%
Undetermined			1	2.3%	9	7.1%	31	10.7%	14	4.8%	1	0.7%			1	0.6%	4.7%	
Totals			52		43		126		289		289		152		98		168	1217

Table 13: Business Inventory Comparison

Clearly Leland Avenue has fewer establishments than most of the comparison districts. And yet the distribution of businesses between different categories is quite similar to the others. Most of the districts have between 20 and 30% retail businesses and 35 to 45% service businesses.

The most promising categories identified through this analysis included flowers and gifts, restaurants, clothing stores and cafes. Table 14 presents the categories that make up the largest percentage of the average mix in other districts that are missing or underrepresented on Leland.

Table 14: Business types underrepresented on Leland Avenue

Category	Leland		Bernal Hts		Bayview		Clement		Excelsior		Fruitvale		Lakeshore		Temescal		Average
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	
Flowers/cards/gifts			4	9.3%	1	0.8%	17	5.9%	6	2.1%	2	1.3%	6	6.1%	3	1.8%	3.2%
Non-ethnic restaurant	1	1.9%	2	4.7%	7	5.6%	16	5.5%	15	5.2%	2	1.3%	3	3.1%	13	7.7%	4.8%
Asian restaurant			1	2.3%	2	1.6%	23	8.0%	3	1.0%					5	3.0%	2.8%
Clothing/shoes	1	1.9%			4	3.2%	7	2.4%	9	3.1%	23	15.1%	5	5.1%	4	2.4%	4.4%
Bars			2	4.7%	2	1.6%	5	1.7%	6	2.1%	2	1.3%	2	2.0%	4	2.4%	1.9%
Café			1	2.3%	1	0.8%	8	2.8%	2	0.7%	1	0.7%	3	3.1%	3	1.8%	1.6%
Bakery/bagels					1	0.8%	7	2.4%	3	1.0%	1	0.7%	4	4.1%	2	1.2%	1.5%
Electronics							6	2.1%	1	0.3%	5	3.3%	1	1.0%	4	2.4%	1.4%
Liquor					7	5.6%	1	0.3%	3	1.0%	3	2.0%	1	1.0%	2	1.2%	1.4%
Check cashing/money wiring					3	2.4%			4	1.4%	7	4.6%	1	1.0%	1	0.6%	1.3%
Hobby/craft							2	0.7%	7	2.4%	3	2.0%	2	2.0%	1	0.6%	1.2%
Repair shops							2	0.7%	1	0.3%	4	2.6%	2	2.0%	2	1.2%	0.9%
Music					1	0.8%	2	0.7%	2	0.7%	3	2.0%	1	1.0%	1	0.6%	0.8%
Photo							3	1.0%	1	0.3%	1	0.7%	3	3.1%	2	1.2%	0.8%
Ethnic restaurant	2	3.8%	2	4.7%	4	3.2%	25	8.7%	8	2.8%	10	6.6%			5	3.0%	4.6%
Physical fitness			2	4.7%	1	0.8%	1	0.3%					3	3.1%	2	1.2%	0.7%
Hardware					1	0.8%	2	0.7%			1	0.7%			4	2.4%	0.7%

Conclusions

It is clear from this analysis that Visitation Valley is lacking many of the businesses that similar neighborhoods have. Leland Avenue could provide an appropriate location for new businesses to locate. The methods of analysis presented above provide some indication of the types of businesses that the community could most productively invest time and resources into attracting. However, each of the approaches described indicates a slightly different list of potential business types. The comparative leakage approach probably provides the best single metric because it is the only one that balances both supply and demand characteristics of the neighborhood, but looking at the opportunities from several perspectives provides a more complete picture.

Table 15 compiles the results of several methods of analysis into one matrix in order to highlight the most promising categories for a business development strategy for Leland Avenue. The table includes all of the business types that had a relatively high comparative leakage (the business categories listed in Table 12) – ranked in the same order. But the table also indicates, for each business category, that category’s rank according to each of the other methods. Many, but not all, of the categories that ranked highly using the comparative leakage score also ranked highly under the other factors. In order to highlight those categories that scored highly, the top 15 categories identified by each approach are highlighted in grey. In addition the table includes the business types identified by the community as the most desirable targets for business attraction. It is fortunate, and probably not coincidental, that nearly all of the business types identified as desirable by the community scored very highly on more than one

of the comparative rankings. This similarity seems to indicate that community members who participated in this have a fairly accurate intuition about what types of businesses are missing from Leland Avenue compared with other neighborhood commercial districts.

Note: two of the business types identified by the community are not included in the retail data. The census bureau categorizes video stores as rental businesses (along with car rentals and party rentals) and martial arts studios as schools, therefore neither appears in the ESRI data for retail and food businesses.

**Table 15: Evaluation Matrix
Potential Business Attraction Targets for Leland Avenue**

Category	Leakage Factor	Average Leakage	Leakage Comparison Rank	Total Sales Rank	Sale Per Household Rank	Leakage Rank	Inventory Rank	Meets Community Criteria	Community Wish List
NAICS 7224: Drinking Places (Alcoholic)	53.70	27.45	1	18	7	6	4	N	
NAICS 4512: Book, Periodical, and Music Stores	52.80	30.12	2	7	2	7	17	Y	Newsstand/bookstore
NAICS 4482: Shoe Stores	71.80	31.92	3	25	13	2	3	Y	shoe repair
NAICS 4531: Florists	18.90	23.49	4	9	5	14	1	Y	
NAICS 7222: Limited-Service Eating Places	45.80	20.75	5	10	6	9	5	Y	Coffee shop, Ice Cream Shop, Internet Café
NAICS 4483: Jewelry, Luggage, and Leather	56.20	39.23	6	31	19	4	18	Y	
NAICS 446/NAICS 4461: Health & Personal Care	11.70	19.08	7	3	1	18		Y	Drugstore
NAICS 4481: Clothing Stores	47.00	29.68	8	26	18	8	3	Y	
NAICS 4421: Furniture Stores	60.80	36.45	9		8	3		Y	
NAICS 4452: Specialty Food Stores	41.40	19.96	10	6	9	10		Y	
NAICS 4521: Department Stores (Excluding	97.60	42.13	11	33	22	1		Y	
NAICS 4533: Used Merchandise Stores	13.70	27.32	12	12	10	15		Y	
NAICS 4451: Grocery Stores	22.30	10.38	13	2	3	13		Y	Supermarket
NAICS 4411: Automobile Dealers	55.40	44.47	14					N	
NAICS 4413: Auto Parts, Accessories, and Tire S.	35.50	26.44	15					Y	
NAICS 4532: Office Supplies, Stationery, and Gift	12.90	25.55	16	11	17	17		Y	
NAICS 4543: Direct Selling Establishments	41.40	30.14	17	8	12	11		N	
NAICS 7223: Special Food Services	2.50	33.02	18	23	26	21		N	
NAICS 4453: Beer, Wine, and Liquor Stores	(15.90)	22.10	19	4			7	N	
NAICS 447/NAICS 4471: Gasoline Stations	(6.60)	19.51	20	1				N	
NAICS 4529: Other General Merchandise Stores	(13.30)	42.77	21	22	28	13		Y	
NAICS 4511: Sporting Goods/Hobby/Musical Instr	(15.00)	28.74	22		29		9	Y	Hobby Store/Electronic Games
NAICS 4441: Building Material and Supplies Deal	2.20	31.31	23				15	Y	Hardware store/key shop
NAICS 7221: Full-Service Restaurants	9.70	33.11	24	29	31	5	2	Y	Restaurants
NAICS 6116: Sports and Recreation Instruction	N/A	N/A	N/A	N/A	N/A	N/A		Y	Martial Arts Studio
NAICS 5323: Video Tape and Disk Rental	N/A	N/A	N/A	N/A	N/A	N/A		Y	Video store

The business categories that appear to best meet the community's criteria and score well under several of these comparative measures may be the best initial targets for business attraction efforts. These include:

- **Books and Music:** this category includes bookstores and music/CD stores as well as newsstands.
- **Florists**
- **Shoe Stores**
- **Limited Service Eating Places:** Including fast food restaurants, take out restaurants, pizzerias, bagel bakeries, delis and sandwich shops, juice bars, coffee shops and cafes, doughnut shops, and ice cream parlors.
- **Health and Personal Care:** Includes drug stores/pharmacies as well as beauty supply stores, optical/eyeglass stores and stores that sell nutritional supplements.
- **Specialty Food Stores:** includes meat markets, fish markets, produce markets, bakeries, and candy stores.
- **Clothing Stores**
- **Furniture Stores**
- **Used Merchandise Stores**
- **Grocery Stores**
- **Sporting Goods/Hobby/Musical Instruments:** Includes toy stores, hobby stores, game stores, video game stores.

In addition, the following retail types were identified by the community as desirable and are underrepresented on Leland Avenue according to the business inventory comparison but were not included in the dataset used for the leakage and comparative analysis.

- **Video stores**
- **Street Front Offices:** Including travel agency, insurance agent, and dental office
- **Fitness Studios:** including martial arts studios and gyms

Attachments:

Business Mix Based on Walking Inventory July 2004
000-200 Blocks of Leland and 2200-2600 Blocks of Bayshore

Retail	
Eating and Drinking Places	5
Food Stores	5
Market	1
General Merchandise	2
Home Improvement	2
Furniture and Home Furnishings	
Auto Dealers, Gas Stations	2
Misc. retail:	
Florist	
Apparel/Accessories	1
Pharmacy	1
Movie rental	1
Drug store	
Shoe store	
Wireless phones	1
Other	
Services	
Automotive services	4
Health services	3
Legal services	
Educational institutions and libraries	1
Hotels/lodging	
Movies and amusements	1
Other services:	
Laundry services	6
Travel services	
Grooming services	5
Other	2
Finance, Insurance, Real Estate	
Banks, savings and lending	2
Securities brokers	
Insurance carriers and agents	
Real estate, holding and other investments	
Government	1
Community/Nonprofit	2

Religious	4
TOTAL BUSINESSES	52
Parking Lots	1
Open Space	1
Vacant Storefronts	14 (3 soon to be filled)
Vacant Lots	6

**Leland/Bayshore Commercial District Revitalization
Community Workshop #2 September 1, 2004**

Where Do You Shop? Questionnaire
Leland/Bayshore Commercial District Revitalization

Food		Dine Out/Entertainment	Non-food Shopping	Spend Most Time	Major reasons*
ID	Bernal Heights, Ferry Building	Mission, Bernal Heights, 9th Ave	Bernal Heights, Downtown, Serramonte, Stonestown, Chestnut St	Bernal Heights	GS
Specific Stores	1	Good (Life Food)	Hair Services, Variety of Stores	Grocery, Video	
ID	Chinatown, Sunset, Richmond	North Beach	Stonestown, Downtown	Chinatown	LOC, PR, GS
Specific Stores	2	Safeway			
ID	3 16th & Pretahn (Potrero?)	Milpitas, Geneva Hometown, KFC	Commn (?) Target, JC Penney's, Mervyn's, Foot Locker, Macy's		SER, PR, EP, GS
Specific Stores		Safeway			
ID	4 Mission, San Bruno Ave	Glen Park, Potrero Hill, North Beach	Hills Dale, Colma	Glen Park	SER, PR, O: attractiveness
Specific Stores		Safeway, Produce Stores	Home Depot	Book Stores, Cafes, Restaurants	
ID	5 Portola	Bernal Heights	Colma, Bayview Plaza	Mission	
Specific Stores		Bell	Target, Goodwill	Safeway, Goodwill, \$.99 Stores	
ID	6 16th & Potrero	Various - None in VW	Fillmore, Bernal Heights	Fillmore	LOC, PR, WD, GS
Specific Stores		Safeway, PetCo		Goodwill, Walgreens	
ID	7 Potrero Hill	San Bruno	Serramonte	San Bruno Ave	
Specific Stores		Safeway	Macy's, Target	Bank, Grocery Store, Tiffany's Restaurant, Walgreens	LOC, SER, WD, EP, GS
ID	8 Chinatown	South Bay	Bay Area	Bay Area	PR, EP, GS
Specific Stores		Chinese Stores			
ID	9 Western Addition	Fillmore	Stonestown		
Specific Stores					
ID	10 Bernal Heights	Bernal Heights, Potrero Hill	Bernal Heights, Potrero Hill	Bernal Heights	LOC, PR, GS
Specific Stores		Good Life Food	Palatino's, Eliza's, Liberty Café		
ID	11 San Bruno	Sunset, Daly City, San Bruno	Daly City, Serramonte, Stonestown	Vis Valley	LOC, PR, WD, EP
Specific Stores		Veg. Stand	Cost Club, Macy's, Target	Savers	
ID	12 Bayview, San Bruno Ave, Williams Ave	Serramonte, Colma	Serramonte, Market St, 16th & Potrero	Vis Valley	
Specific Stores		Food Co, TGIF	Ross, Nordstroms	Sunnydale Center, V J etclaeer	PR, GS
ID	13 Chinatown - Stockton St	Chinatown - Stockton St	Downtown	Downtown	LOC, PR
Specific Stores			Walgreens		
TOTAL	Chinatown, Potrero Hill, San Bruno	Bernal Heights	Chinatown, Serramonte, Stonestown	Bernal Hgts, Chinatown, Vis Valley	1)Price 2)Good & Services

***KEY**

- (a) Convenient location = LOC
- (b) Less traffic/crowds = TC
- (c) Friendly services = SER
- (d) Fair prices = PR
- (e) Within walking distance = WD
- (f) Support local businesses = LB
- (g) Easy to find parking = EP
- (h) Good selection of good & services = GS
- (i) Other: O

****KEY**

- Always = A
- Sometimes = S
- Never = N



What qualities make a business good for this neighborhood?

Rate the following on a scale of 1-5 based on what qualities are important to you, with 5 being the most important.

- Signage and service in language other than English
- Store is open evenings and weekends
- Socially responsible products offered
- Has money to do renovations if needed
- Provides parking
- Attracts a more affluent clientele
- Does not attract an affluent clientele
- Attracts neighborhood people
- Attracts people from outside the neighborhood
- Expresses intention to keep area/neighborhood clean
- Has a regional or nationally-known name and reputation
- Is family-run, independent
- Is an established business
- Is a new business/entrepreneur
- Is an minority- or woman-owned business
- Owner lives in or has ties to the community
- Owner owns his/her own property
- Business does not threaten existing small businesses
- Expresses interest in working with community organizations and giving back to the community