

San Diego Promise Zone
Economic & Community Development
Bus Tour
November 30, 2017

Presented by





November 30, 2017

Dear Participant,

Welcome to the San Diego Promise Zone Economic Bus Tour. Today, we'll visit downtown's East Village, Barrio Logan, Logan Heights and Southeastern San Diego. An overview of each community will be provided, and we'll introduce you to a number of recently completed development projects, as well as, potential development opportunities and how they are woven within the same fabric of each communities' needs and community development plans.

We hope this program book is a helpful resource detailing each of the communities' current assets and potential opportunities. Each chapter was created by the community stakeholders and organizations you will hear from during the tour.

On behalf of the City of San Diego, Civic San Diego, Wells Fargo Bank, our tour sponsor, Trestle Development, Woodbury University, Bame CDC, Jacobs Center for Neighborhood Innovation, The Southeastern Diamond Business District and the numerous organizations and speakers you'll hear from during the tour, thank you for attending this robust community and economic development tour of the San Diego Promise Zone. Each of you, as civic and organization leaders, have the vision, industry knowledge, and the experience to help us pave the way in helping to meet our San Diego Promise Zone six performance goal indicators, which are to 1) Create More Jobs, 2) Increase Economic Activity, 3) Increase Safety, 4) Improve Education Attainment, 5) Increase Affordable Housing, and 6) Offer Better Health.

We hope you get connected and involved in this engaging tour today and find opportunities that are mutually beneficial to the San Diego Promise Zone communities and your organization's body of work.

My personal respect and thanks goes out to all of you.

Sincerely,

A handwritten signature in blue ink, appearing to read "Reese A. Jarrett".

Reese A. Jarrett
President

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For more information, please contact:

Gustavo A. Bidart at bidart@civicsd.com or (619) 533-7108.

Promise Zone



San Diego, California



How Alternative Resources Can Help Finance New Development Within San Diego's Promise Zone

By: Tiffany Huynh
Senior, University of San Diego
USD Intern at CivicSD, Fall 2017

According to the U.S. Department of Housing and Urban Development, 39.06% of San Diego's population live in poverty along with a 15.61% unemployment rate.¹ The Promise Zones and Promise Neighborhoods are development programs designed to bring economic growth and vitality to these underserved neighborhoods. Promise Zones are facilitated under the U.S. Department of Housing and Urban Development where the focus is to create jobs, stimulate economic growth, provide better educational opportunities and increase the access of affordable housing. With the proper financing, these underdeveloped neighborhoods will be able to build a successful foundation of strong and prosperous communities for the future of San Diego.

Within the San Diego Promise Zone Tour, there is an emphasis on four communities; East Village, Barrio Logan, Logan Heights and Encanto/ Diamond District. Each community within the Promise Zone has particular needs that are necessary for new development. Although tax increment monies are no longer available, it is my intent to highlight resources that can be utilized for future development. There are multiple financial programs and funds that can be leveraged within the Promise Zone that compliment each community while under development. These development programs assist families earning below 80% of San Diego's area median income (SD AMI), include Low Income Housing Tax Credits (LIHTC), Transit Oriented Development Fund (TOD) and New Market Tax Credits (NMTC). All of these development programs must meet the criteria of community benefit and target the needs of each specific community within the Promise Zone.

As more new development takes place in California, it is important to recognize and take action in finding solutions to the issue of gentrification. Development programs have been able

¹ Carson, Ben, "U.S. Department of Housing and urban Development"
<https://www.hud.gov/>

to alleviate gentrification by building affordable housing through the use of the Low Income Tax Credit (LITC) program. Including families living in underserved communities within the Promise Zone prevents displacement and promotes community growth. The Low Income Tax Credit (LIHTC) is a federal government program which motivates the investment of private equity in the development of affordable housing. This allows for investors to claim tax credits on their federal income tax returns which are calculated as a percentage of costs incurred during the investment. Equity that arises from LIHTC are then used as redevelopment funds within underserved communities. Projects using the LIHTC financing must accumulate their funds through many resources including tax credits. These sources include:

- Supportable Debt
- Market Value of tax Credits
- Deferred Developer Fees
- Solar Equity
- Proposed City Loan
- Ground Lease Value for Tax Credits

This program is identified as one of the most vital resources for creating affordable housing in the United States today.² With the use of LIHTC, low income households are able to rent units at an accommodating price. This ensures low income families a secure place within their growing communities as well as being present in the positive progression of their local communities.

² Carson, Ben, "Office of Policy Development and Research (PD&R) U.S. Department of Housing Urban Development " last modified July 10, 2017
<https://www.huduser.gov/portal/datasets/lihtc.html>

Over the years there has been increasing action to develop “urban in-fill” communities in close proximity to transit oriented services. Low income workers typically travel long distances outside their communities to work. This causes low income families to incur unwanted transportation costs which is an added disadvantage to underserved communities. The Transit-Oriented Development program (TOD) invests in mixed-use spaces and mixed-income affordable housing, located near transit stations. Redeveloping near transit facilities benefits communities by reducing commuting costs, provide retail within the neighborhood, is environmental friendly and improves economic activity.³

An example of a development project that is intending to utilize TOD funds, is the Encanto Village Trolley Transit Oriented Development. This project is located within the Encanto Village community within the Promise Zone and is looking to build affordable and market rate housing and mixed-use retail in close proximity to transit services and public transportation. The Encanto Village Trolley Transit Oriented Development will be an impressive addition to the Encanto/ Diamond District community while achieving the Promise Zone mission.

Low-income areas often experience little to no investment within their communities. The New Market Tax Credit Program (NMTC) is intended to help increase the amount of investment within distressed neighborhoods by attracting private investment necessary for economic revitalization within low-income communities. An example of how NMTC can be used is through a Community Development Entity (CDE) such as Civic San Diego. The federal Community Development Financial Institutions Fund (CDFI Fund) certified Civic San Diego as

³ Transit-Oriented Development
<http://www.liifund.org/programs/transit-oriented-development/>

a CDE. Civic San Diego then applies for NMTC allocations from the CDFI fund to attract Qualified Equity Investments (QEIs) from investors interested in developing in low-income communities. Civic San Diego's NMTC Program has benefited many low-income communities within San Diego and the Promise Zone. Once the NMTC program is initiated, the investor provides equity for the project which will equal to approximately 20% of the total project cost. Grants, City loans and other government soft debt are also alternative sources of funding. These specific funds are often forgivable or paid from cash flow of the project if there is a cash flow present or proceeds from refinance or sale of the property.

The New Market Tax Credit Program Targeted Community Benefits:

- Create quality jobs accessible to low-income person (LIPs) or residents of low-income communities (LICs)
- Provide commercial or community goods or services to LICs
- Finance minority businesses
- Housing units available to LIPs or residents of LICs
- Environmentally sustainable outcomes
- Healthy food financing
- Part of Community Plan
- Catalytic

Example of projects initiated by Civic San Diego's NMTC programs include:

- \$23M investment for new Copley-Price Family YMCA facility in City Heights
(completed January 2015)

- \$16.5M investment for Family Health Centers, Health, Information Technology, and Education Center (HITEC) in Oak Park (completed 2015)
- \$7.1M investment for 37 ECB (Momentum Learning) facility in Normal Heights (under construction)
- \$6.7M investment for Thrive Public School facility in Linda Vista in partnership with Bayside Community Center (under construction)

The NMTC program has many community benefits as well as a progressive style of financing communities with the San Diego Promise Zone.⁴

Although it is evident that the majority of gap financing is focused on new development for affordable housing, assisting families earning below 80% San Diego's area median income (AMI), there is a need for additional alternative gap financing targeting families earning between 81%-150% of SD AMI. Civic San Diego has recognized an opportunity to assist middle income families with their housing needs. There is a local effort led by Civic San Diego to support such families by creating a Smart Growth Fund specifically designed for families falling between the 81%-150% SD AMI bracket. Civic San Diego's Smart Growth Fund community benefits include:

- \$30 – 50 million private capital real estate equity fund providing reasonable market rate risk adjusted returns.
- Facilitate capital investment in the production of housing affordable to middle income families.
- Contribute to the revitalization of San Diego's Urban Neighborhoods.

⁴ Civic San Diego New Markets Tax Credit Program Deck

- Consistent with Neighborhood Community Plans.
- Support Smart Growth Development.

The Smart Growth Fund supports middle income families who may often be unrecognized with housing security within their communities.⁵

Since the dissolution of Redevelopment in 2012, alternative resources have become a required means of funding for new development projects within low-to-moderate income communities including San Diego's Promise Zone. Such efforts as the San Diego Promise Zone Economic Development Tour help to build awareness of opportunities and solutions that will provide more housing and community facilities within the Promise Zone by pairing development opportunities with appropriate financing. Ultimately, these combined efforts when successful will help to meet San Diego Promise Zone's six performance goal indicators, which are to 1) Create More Jobs, 2) Increase Economic Activity, 3) Increase Safety, 4) Improve Education Attainment, 5) Increasing Affordable Housing, and 6) Offer Better Health. In doing so, the City of San Diego, Civic San Diego and other community partners hope to revitalize a promising future San Diego.

⁵ Civic San Diego Smart Growth Fund Work Force Housing Deck



civic san diego

new markets tax credit program

our experience

The Civic San Diego Economic Growth and Neighborhood Investment Fund leverages Civic San Diego's resources and experiences to perform underwriting, compliance, and asset management functions. Civic San Diego's management and staff are experienced lenders to disadvantaged businesses and communities and the Fund targets similar borrowers, project types, and low-income areas in the City. We have fully integrated New Markets Tax Credits into our systems and procedures. United Fund Advisors in Portland serves as our fund advisor and Nixon Peabody provides legal counsel.



Reese A. Jarrett, President

Reese A. Jarrett is the President of Civic San Diego. Mr. Jarrett has deployed over \$100 million in capital to low-income communities throughout San Diego. Previously, he served as President of the Southeastern Economic Development Corporation (SEDC) and worked as a loan officer with a commercial bank. He served as Managing General Partner of Carter Reese and Associates, a real estate development entity that developed over 1,200 units primarily in the urban neighborhoods of San Diego. At Civic San Diego, Mr. Jarrett oversees its low-income community investment programs that provide San Diego with quality jobs, and improve the lives of low-income community residents and business owners. He also leads Civic San Diego's capital deployment activities and has worked tirelessly to bring businesses to San Diego's low-income areas to create local job opportunities.



Andrew T. Phillips, Chief Financial Officer & Chief Operating Officer

Andrew Phillips is the Chief Financial Officer & Chief Operating Officer of Civic San Diego. Mr. Phillips has 20 years of experience in the fields of finance and accounting. His responsibilities at Civic San Diego include the oversight of the finance and accounting department, as well as the contracting, risk management, asset and property management staffs. Mr. Phillips is responsible for ensuring that all loan agreement terms are met, that loans remain in good standing, and that any delinquencies are followed up on and collected. On behalf of the City, Civic San Diego currently services hundreds of loans, leases, and rental agreements. Mr. Phillips is also charged with the oversight and debt servicing for the City's former redevelopment agency's 21 taxable, tax-exempt, and revenue bonds with a total value of nearly \$500 million. Mr. Phillips manages the NMTC asset and risk management team.



Kristine A. Zortman, Vice President of Neighborhood Investment

Kristine Zortman is the Vice President of Neighborhood Investment at Civic San Diego. At Civic San Diego, Ms. Zortman works with the Neighborhood Investment staff that negotiates complex development agreements, manages affordable housing projects, and implements public works capital improvements. Ms. Zortman brings 25 years of extensive experience in transactional business development, private/public financing, project/asset management, construction management, legislative analysis and regulatory entitlements. She has negotiated and administered real estate assets, projects and agreements including staff and resources for over 150 properties and has managed over \$22 million in public funds including the decommissioning, demolition and remediation of the former South Bay Power Plant.



Michael Lengyel, Assistant Vice President of Economic Development

Michael Lengyel is the Assistant Vice President of Economic Development with Civic San Diego, overseeing the New Markets Tax Credit program. Mr. Lengyel has more than 15 years of economic development experience. He previously worked for the City of San Diego as a business finance officer managing the City's small business revolving loan funds and as a project manager with the Redevelopment Agency where he provided financing for the development of housing and commercial real estate in targeted urban neighborhoods. Mr. Lengyel has deployed more than \$100 million in NMTC investments, small business loans, commercial real estate investments, and affordable housing financing. He has also been directly involved in more than \$40 million in bond issuances.

For additional information about qualifications and opportunities for funding through the NMTC program, contact Michael Lengyel, Assistant Vice President of Economic Development, with Civic San Diego at (619) 533-7158 or lengyel@civicsd.com.



Visit us at www.civicsd.com



accomplishments

The Civic San Diego Economic Growth and Neighborhood Investment Fund (the "Fund") has received \$133 million in New Markets Tax Credit (NMTC) allocations over the past four years and has deployed \$84 million into six transformative projects that have made significant impact in San Diego communities.

In addition to New Markets Tax Credits, Civic San Diego is developing a number of new tools to continue investment in targeted neighborhoods.

- Transit Oriented Development Investment Fund to support the development of affordable housing along transit
- Smart Growth Fund to address a lack of access to capital for middle income housing
- Community Investment Fund to reinvest in community serving commercial assets
- EB-5 Regional Center to attract capital to support job creating businesses and infrastructure

For additional information about qualifications and opportunities for funding through the NMTC program, contact Michael Lengyel, Assistant Vice President of Economic Development, with Civic San Diego at (619) 533-7158 or lengyel@civicsd.com.

Visit us at www.civicsd.com



about civic san diego

Civic San Diego is a non-profit 501(c)3 corporation, wholly owned by the City of San Diego.

our mission

Foster innovative community partnerships to improve the quality of life in San Diego's neighborhoods.

our vision

Revitalized neighborhoods – great places to live and work.

our core values

Respect the community as partners | Transparent engagement | Fiduciary stewards of public resources | Embrace cultural diversity | Foster high performance culture

new markets tax credit program

In 2012, Civic San Diego formed the Civic San Diego Economic Growth and Neighborhood Investment Fund ("Fund"), which is certified by the federal Department of Treasury as a Community Development Entity. The purpose of the Fund is to apply for New Markets Tax Credit (NMTC) allocations and to use the tax credits to attract Qualified Equity Investments from investors which are used to provide financing for high impact projects in low-income communities.

Our strategy is to provide NMTC loans that enable disadvantaged businesses to grow, create quality jobs, and deliver critical goods and services to San Diego's low-income residents. We target our activities only to businesses that are aligned with a community development plan and that can generate exceptional impacts for low-income persons. Our primary borrowers are community service businesses and larger commercial goods and services projects. Our financing is dedicated to businesses in San Diego's highly distressed communities, with a focus on the City of San Diego's former redevelopment project areas.



civic san diego

new markets tax credit program



copley-price family ymca



In 2013, the Civic San Diego Economic Growth and Neighborhood Investment Fund allocated \$23 million in New Markets Tax Credits (NMTC) to help build the new, state-of-the-art Copley-Price Family YMCA facility in City Heights at Fairmount and El Cajon Boulevard. The 53,000 square-foot facility features an aquatics center, fitness center, group exercise studios, teen center, gymnasium, soccer arena, computer lab, child-care center, demonstration kitchen and a community meeting room. The project was completed in January 2015.

family health centers oak park



In 2014, the Civic San Diego Economic Growth and Neighborhood Investment Fund provided \$16.5 million in NMTC to help build the new 34,300-square-foot Family Health Centers of San Diego Health, Information Technology, and Education Center (HITEC) facility in Oak Park. The community is medically underserved and the facility houses an approximately 3,000 square foot community health clinic and also a health information technology education and training center. The project was completed in January 2016.

urban corps of san diego county



In 2015, the Civic San Diego Economic Growth and Neighborhood Investment Fund provided \$8 million in NMTC to Urban Corps of San Diego County, a local conservation corps providing youth job training and education since 1989. Urban Corps youth participants work 24 to 30 hours each week in the community learning tangible job skills and earning vocational credits. They attend school two days a week and spend one hour each day after work in a study group to prepare for the California High School Exit Exam. The operating capital supports increasing annual enrollment from 190 to 230 youth and increasing the number of annual graduates from 100 to 125.

civic san diego

new markets tax credit program

jackie robinson family ymca



The Civic San Diego Economic Growth and Neighborhood Investment Fund provided a \$23 million NMTC investment to help bridge a funding gap for the construction of the new approximately 44,000-square-foot, two-story ADA-compliant expanded Jackie Robinson Family YMCA. The new facility opened in October 2017. It includes a gymnasium, wellness center; community multipurpose room, teen center; childcare center and playground, three group exercise and mind and body studios, and other amenities.

37ecb—momentum learning



A \$7.1 million NMTC investment (along with a \$1 million allocation from Chase Bank) supported substantial rehabilitation of two buildings in Normal Heights to provide a new larger site for the San Diego County Office of Education's new educational model/concept (Momentum Learning) that will focus on teaching at-risk youth tangible skills like culinary arts and welding/fabrication that will greatly expand opportunities for students to transition directly into living wage jobs. The school had initial enrollment in October 2016.

thrive public school



The Civic San Diego Economic Growth and Neighborhood Investment Fund provided \$6.7 million in NMTC (along with a \$6 million allocation from Excellent Education Development based in Los Angeles) for construction of the new Thrive Public School in Linda Vista. The 35,000-square-foot-facility will include 30 unique learning spaces, a technology lab, an outdoor classroom, learning lounges, collaborative student offices, and community rooms. Construction is anticipated to be completed by August 2018.



U.S. Dept. of Housing and Urban Development
Julián Castro, Secretary



U.S. Dept. of Agriculture
Tom Vilsack, Secretary

HUD No. 16-085

Heather Fluit

202-708-0685

<http://www.hud.gov/news/index.cfm>

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FOR RELEASE

Monday

June 6, 2016

OBAMA ADMINISTRATION NAMES FINAL ROUND OF PROMISE ZONE COMMUNITIES

Nine new Promise Zones join 13 others to expand economic opportunity in distressed areas

WASHINGTON – The Obama Administration today named the final nine Promise Zones across the country – high poverty areas in select urban, rural and tribal communities. Through the [Promise Zone Initiative](#), the Federal government will work strategically with local leaders to boost economic activity and job growth, improve educational opportunities, reduce crime and leverage private investment to improve the quality of life in these vulnerable areas.

The following communities now include Promise Zones:

1. [Atlanta, Georgia](#)
2. [Nashville, Tennessee](#)
3. [Evansville, Indiana](#)
4. [South Los Angeles, California](#)
5. [San Diego, California](#)
6. [Southwest Florida Regional Planning Commission](#)
7. [Spokane Tribe of Indians, Washington](#)
8. [Turtle Mountain Band of Chippewa Indians, Rolette County, North Dakota](#)
9. [Roosevelt Roads, Puerto Rico](#)

U.S. Department of Housing and Urban Development (HUD) Secretary Julián Castro traveled to Atlanta to make the announcement while U.S. Department of Agriculture (USDA) Secretary Tom Vilsack announced the new Promise Zone in Roosevelt Roads, Puerto Rico on Friday. In addition, a host of other senior Administration officials made individual announcements in the other Promise Zones.

“Promise Zones bring the power of partnership to a whole new level as we seek to bring opportunity to neighborhoods long locked out of their area’s prosperity,” said HUD Secretary Castro. “As a former mayor from a city that includes a Promise Zone, I know just how powerful these collaborations are when it comes to building stronger, economically vital neighborhoods.”

-more-

“Rural and Tribal areas face unique challenges and we are ready to take on those challenges with creative solutions that strengthen communities,” said USDA Secretary Vilsack. “The Promise Zone initiative delivers proven results by encouraging collaboration between the federal government, community organizations, the private sector and state and local governments. Through these partnerships, we are supporting jobs and economic opportunities that enable rural areas to thrive.”

Background on Promise Zones:

Today’s newly designated Promise Zones join 13 others that President Obama designated in 2014 and 2015. These Promise Zones include targeted neighborhoods in the following communities:

1. San Antonio, Texas
2. Los Angeles, California
3. Philadelphia, Pennsylvania
4. Southeastern Kentucky Highlands
5. the Choctaw Nation of Oklahoma
6. Camden, New Jersey
7. Hartford, Connecticut
8. Indianapolis, Indiana
9. Minneapolis, Minnesota
10. Sacramento, California
11. St. Louis/St. Louis County, Missouri
12. Pine Ridge Indian Reservation of the Oglala Sioux Tribe, South Dakota
13. The South Carolina Low Country

Work is well underway in these communities and demonstrating results. For example:

- In Indianapolis, the IndyEast Promise Zone has already secured nearly \$10 million in federal grants across seven different agencies. This support has helped create 110 jobs, provide life-changing workforce training to hundreds of formerly incarcerated individuals, and develop a new energy efficient apartment building for low-income senior citizens.
- In North Minneapolis, USDA awarded Appetite for Change (a locally led organization) a Community Food Project grant to help continue and expand programs that are changing the way food is produced, marketed, distributed and consumed in North Minneapolis. This project has served over 1,000 community members, with 24 youth employed and trained and 15 jobs created, aiding 53 community-owned food business start-ups.
- In San Antonio, the Promise Zone to Work Initiative was launched and has since provided free job training certifications in nursing, construction, manufacturing, information technology, and heavy equipment for 106 residents. This effort is contributing to an overall decline in the unemployment rate; over the last four years, unemployment in the Promise Zone declined from 15 percent to 11 percent.

- In Southeastern KY, a new educational framework and support from AmeriCorps VISTA members helped lift the graduation rate at Leslie County High School from 67 to 98 percent.
- In Choctaw Nation, In March 2016, a Los Angeles, CA based company secured \$21 million in New Markets Tax Credits to build an environmentally sustainable steel manufacturing facility in the Promise Zone. The mill will support approximately 300 new jobs in the region.

Additional information on rural and Tribal Promise Zones is available at www.usda.gov/promisezones.

Today's Promise Zone communities were selected from 82 applications from 38 states and Puerto Rico. Each urban, rural, and tribal Promise Zone applicant was asked to put together a clear description of how the Promise Zone designation would accelerate and strengthen the community's own efforts at comprehensive community revitalization. Each Promise Zone will be coordinated by a lead community based organization in partnership with the Obama Administration. HUD will be the federal lead for the five urban designees, while USDA will serve as the lead federal partner to the tribal and rural Promise Zones.

All Promise Zones will receive priority access to federal investments that further their strategic plans, federal staff on the ground to help them implement their goals, and five full-time AmeriCorps VISTA members to recruit and manage volunteers and strengthen the capacity of the Promise Zone initiatives.

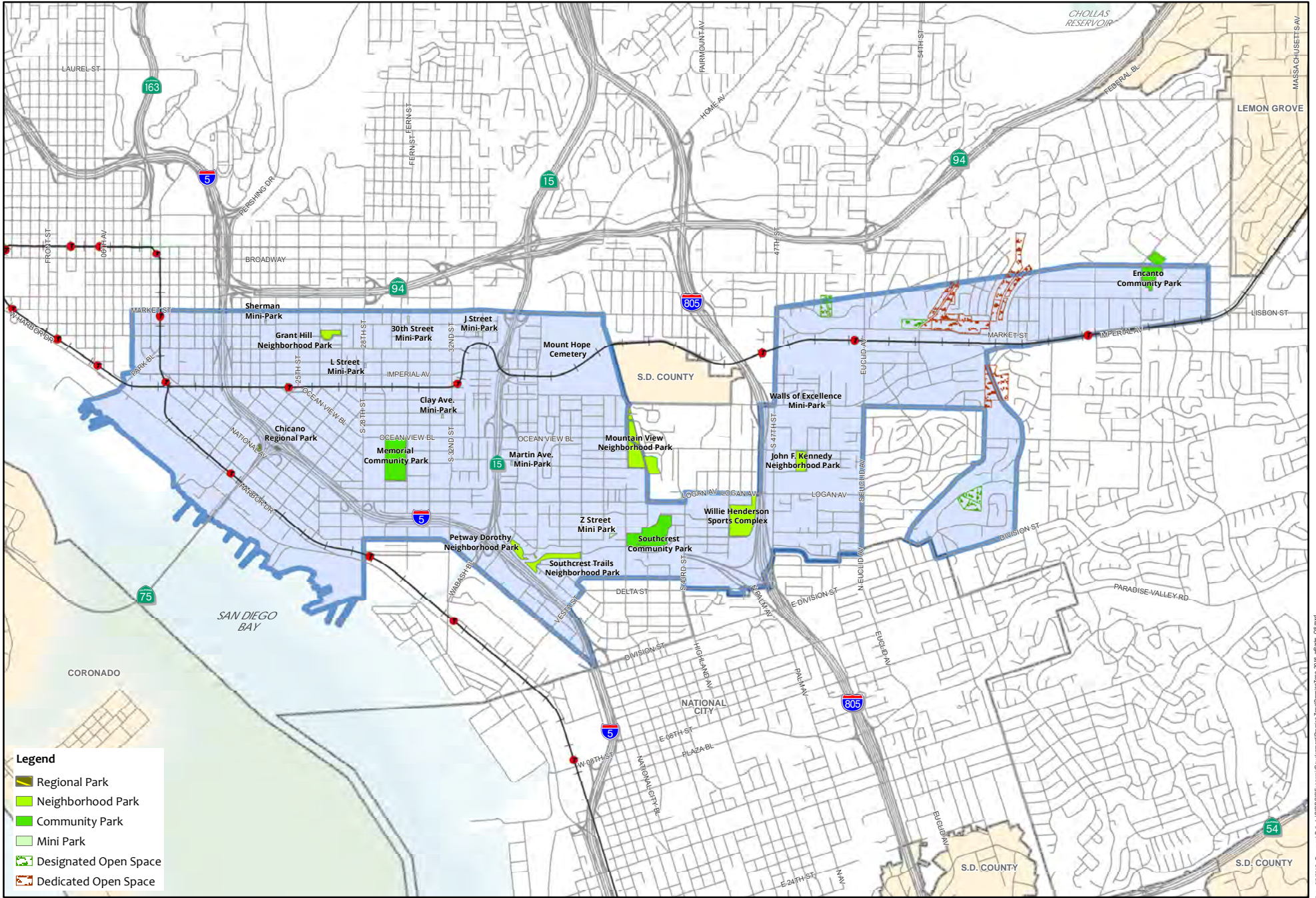
[To receive updates, please subscribe to the Promise Zones mailing list.](#)

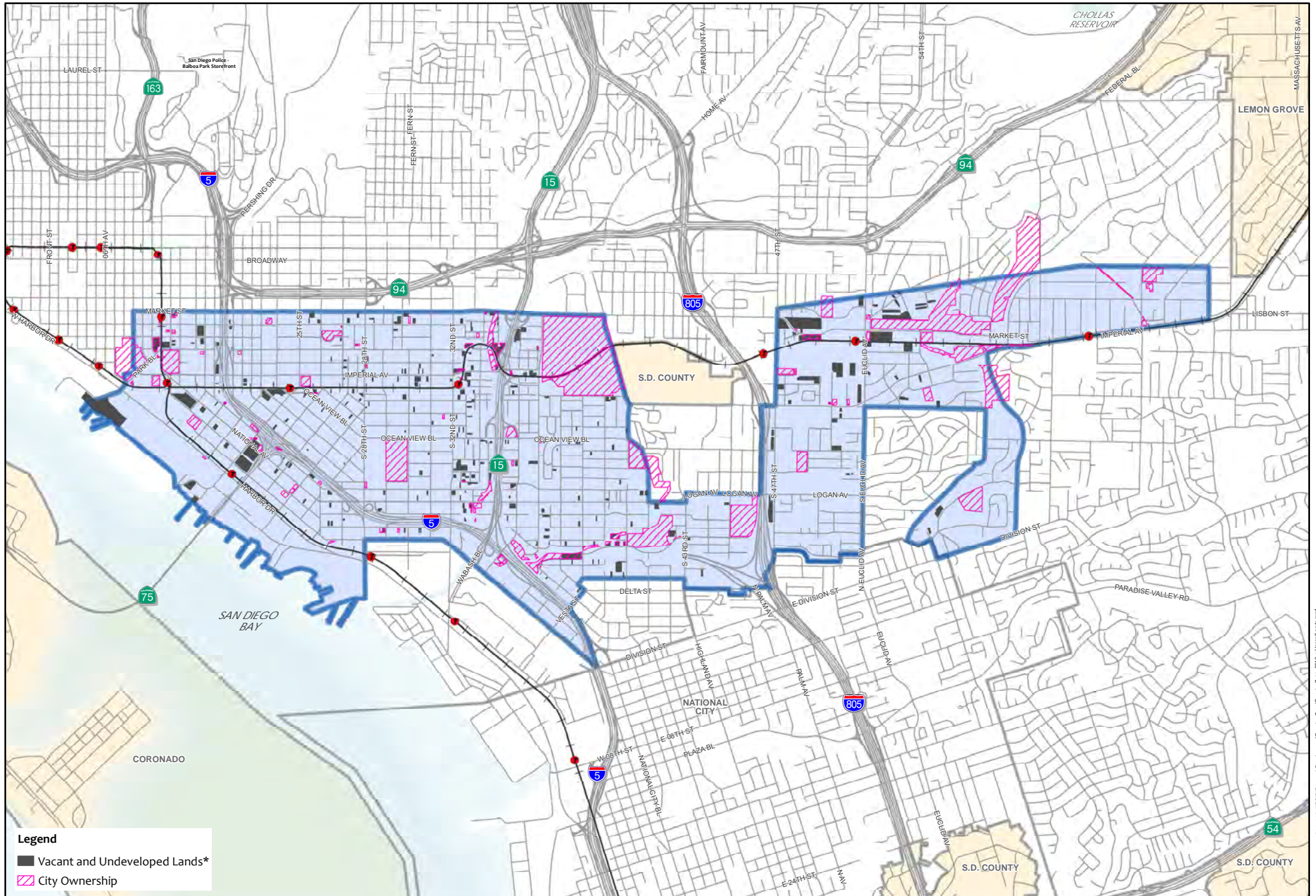
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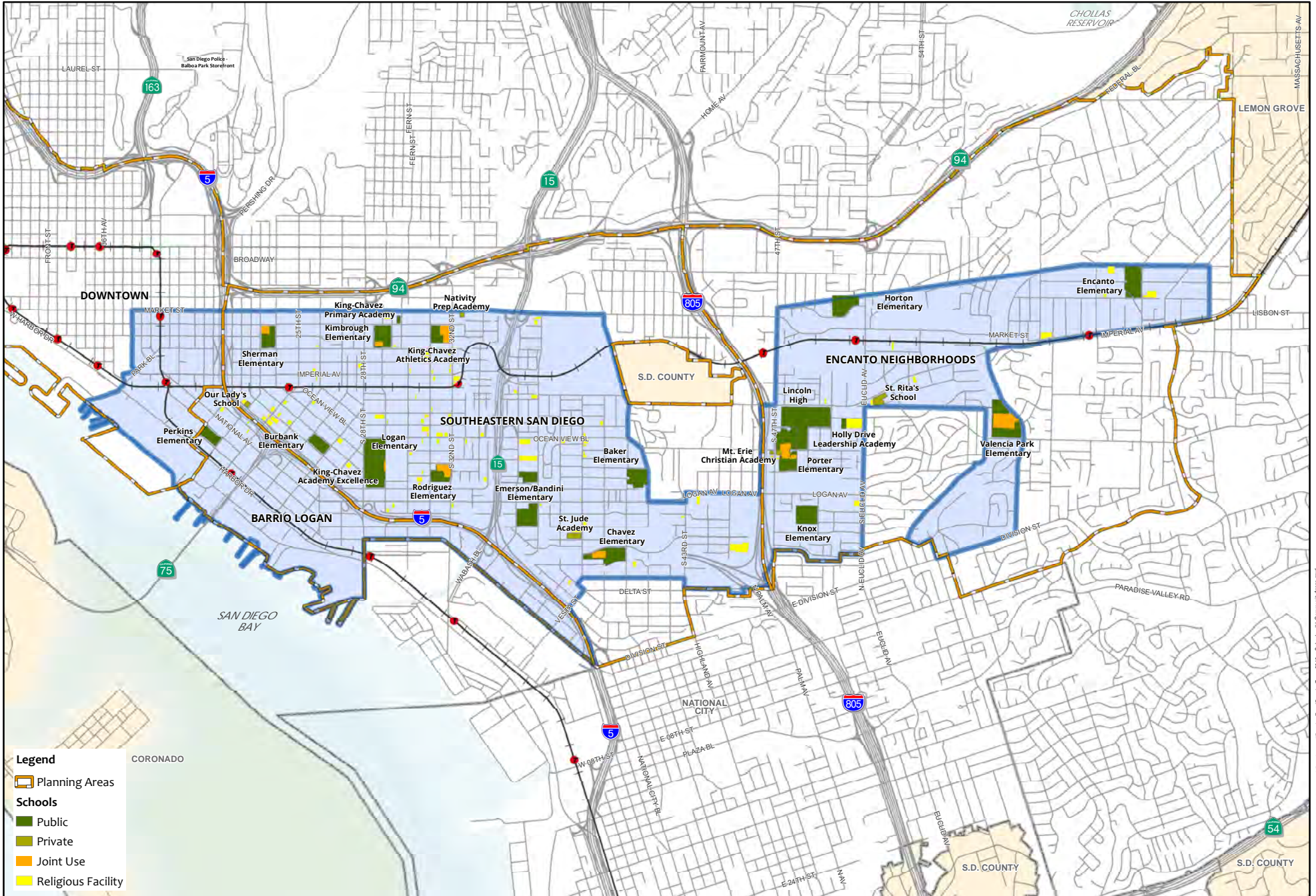
*HUD's mission is to create strong, sustainable, inclusive communities and quality affordable homes for all.
More information about HUD and its programs is available on the Internet
at www.hud.gov and <http://espanol.hud.gov>.*

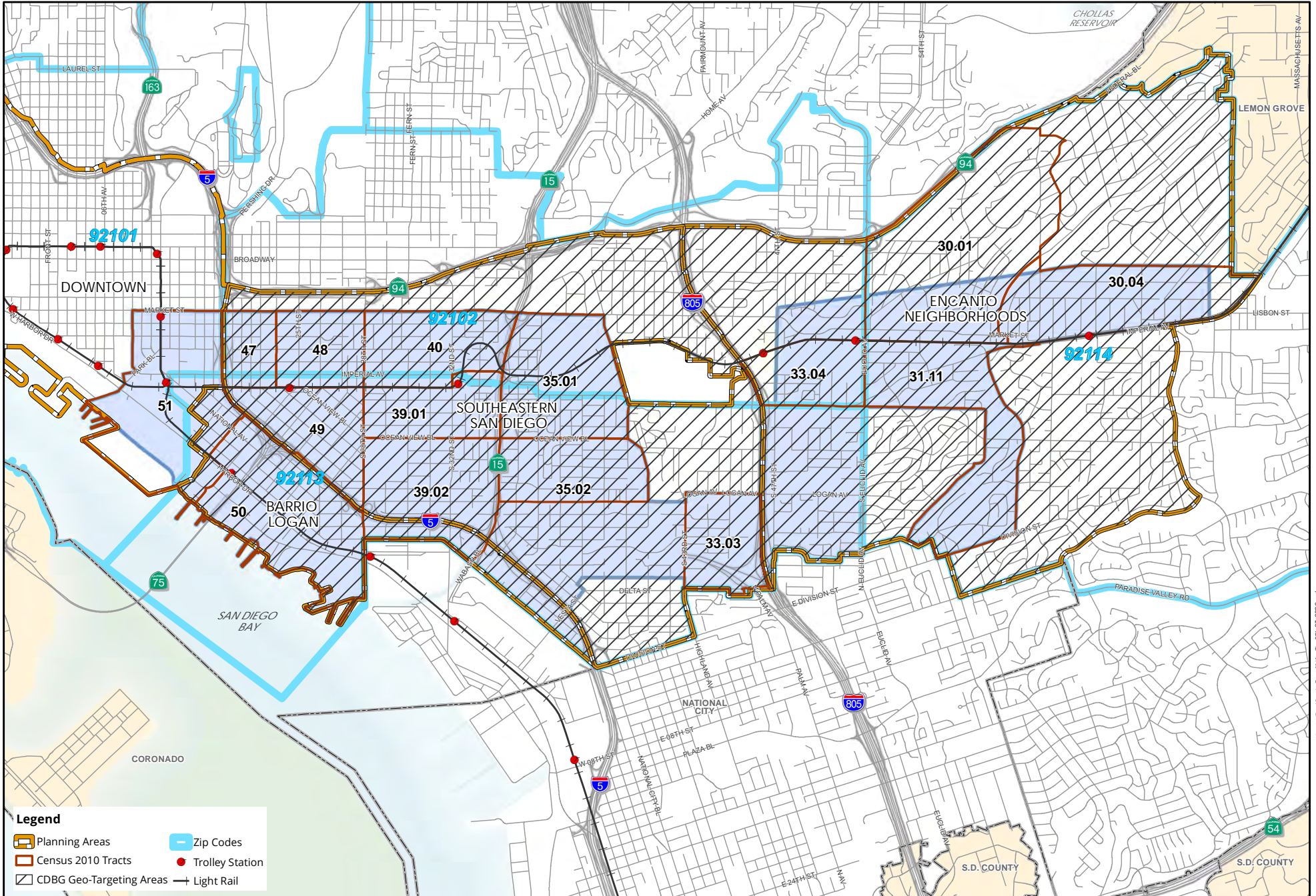
You can also connect with HUD on [social media](#) and follow Secretary Castro on [Twitter](#) and [Facebook](#) or sign up for news alerts on [HUD's Email List](#).

USDA provides leadership on food, agriculture, natural resources, rural development, nutrition, and related issues based on public policy, the best available science, and effective management. Find out more at www.usda.gov.









The map displays the city of San Diego and its surrounding areas, divided into numerous small regions, each labeled with a unique identifier (e.g., 02101, 02102, 02103, etc.). These regions represent different water service areas. The map includes geographical features such as the Pacific Ocean to the west, San Diego Bay to the south, and the Mexican border to the south. Major roads and highways are also shown. A scale bar and a north arrow are located in the bottom left corner.

Date: 2/8/2016 Document Path: L:\GIS\GIS\S\Development\EnterpriseZones\Z_application map\NEC\pZ_Canada\linda's_Citywide_0311_2016.mxd

East Village



Principle, David Allen

Project Manager, Zaheen Chowdhury

TRESTLE

The map shows an aerial view of the El Nudillo neighborhood in San Diego. A green line, likely representing a transit route, runs vertically through the center of the map. A red dotted line outlines a specific area, possibly a project boundary. Key landmarks and locations are labeled, including the Law School, Central Library, Fault Park, Bus Yards, Wonder Bread, Father Joe's, and Future Park. The map also shows major streets such as Market St, Commercial St, Imperial Ave, and K St. A large green circle with a red star is located at the intersection of Commercial St and Imperial Ave. The map includes a scale bar and a north arrow.



14th St. Promenade

Historic or
Potentially Historic

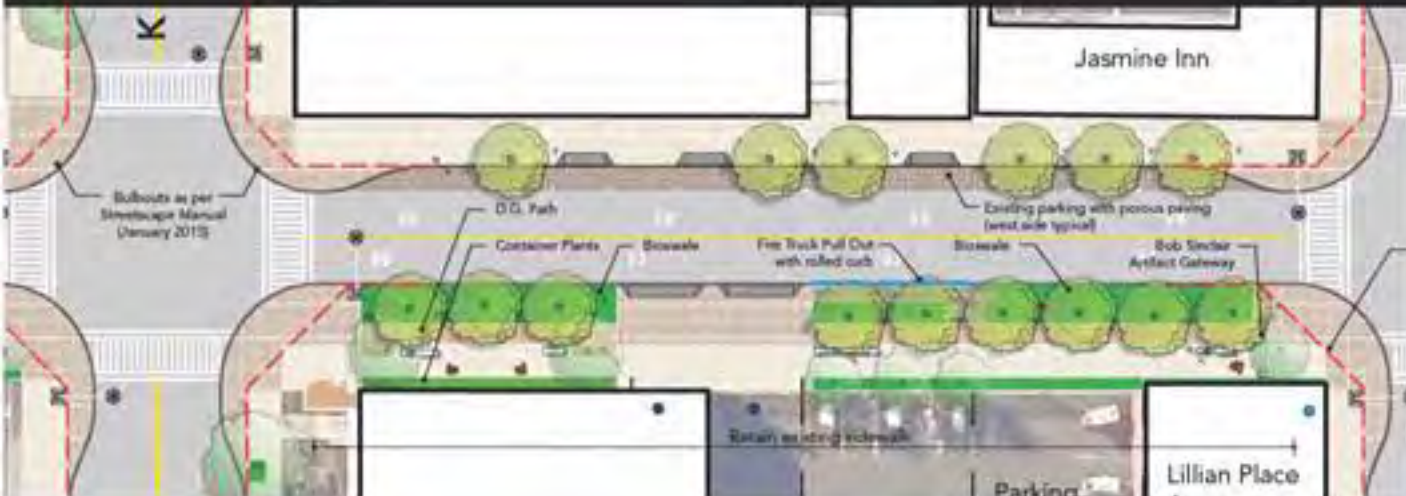
East Village South

Transit Station

iconic dome view

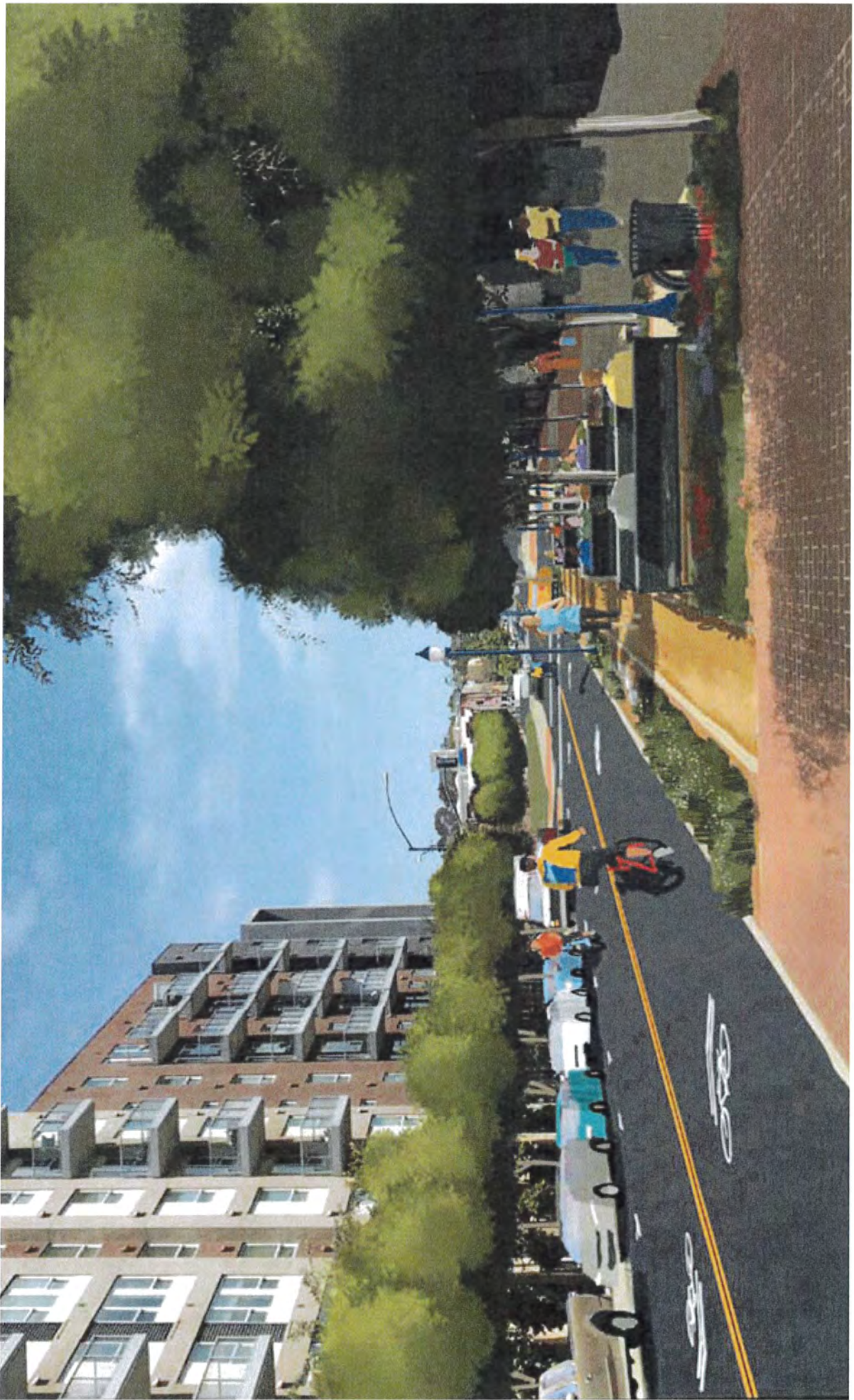
Design complete and approved:

14th Street Promenade



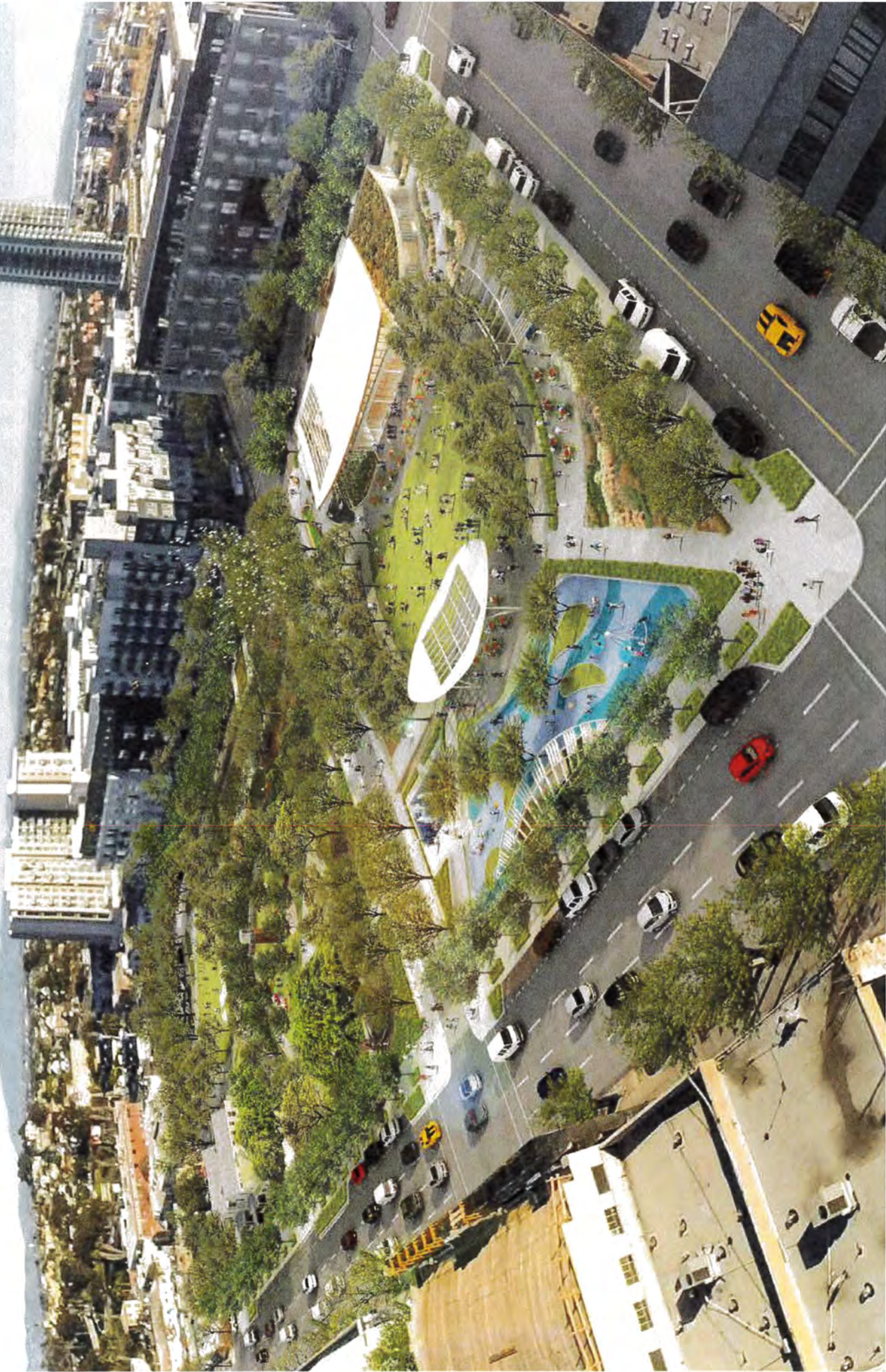
14th Street Promenade



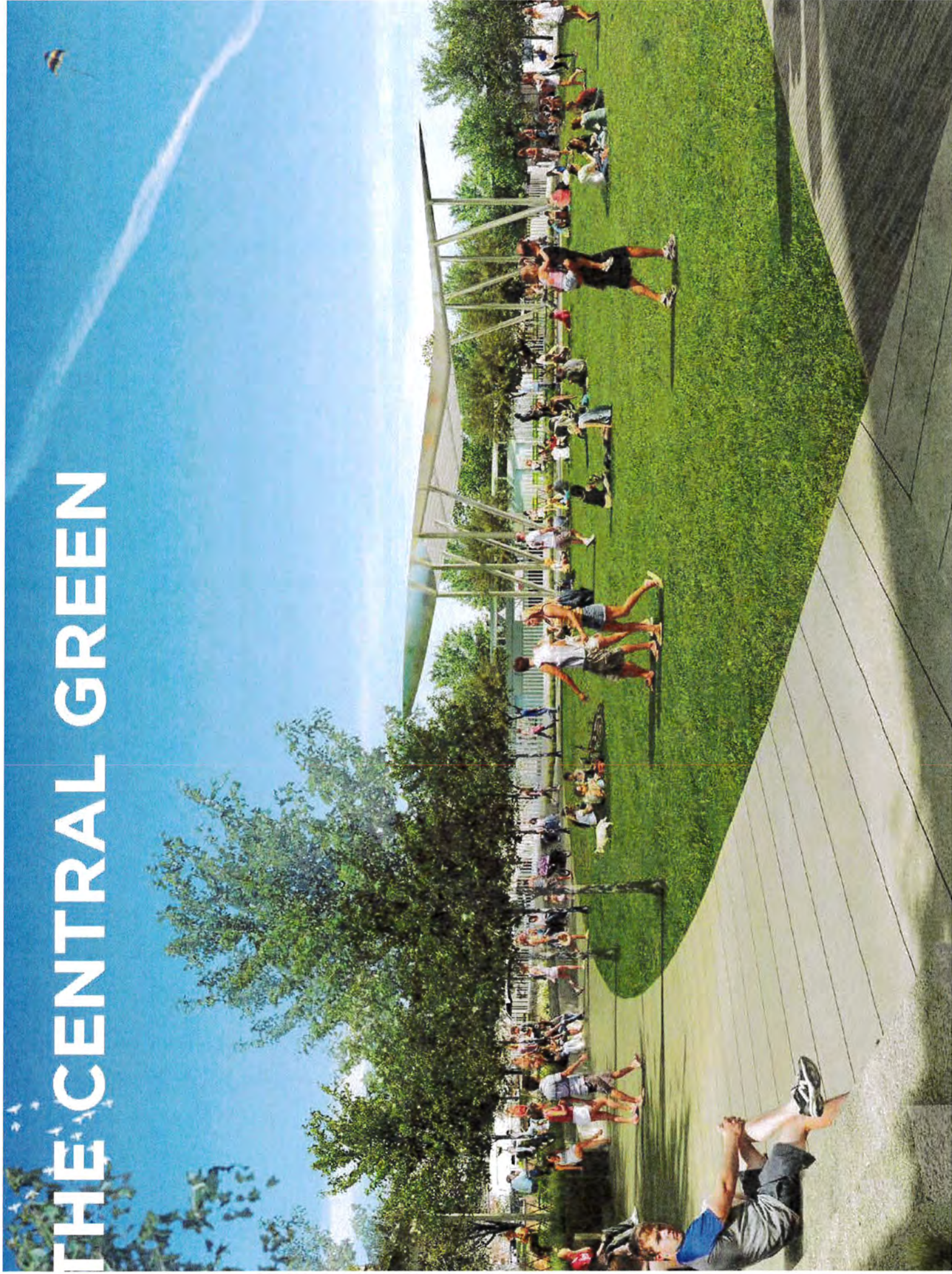




LOOKING SOUTHEAST



THE CENTRAL GREEN



DOG PARK





NOOK EAST VILLAGE

1492 K St.



Nook East Village is a 91-unit micro apartment development currently under construction on the corner of 15th and K Streets in the East Village neighborhood of downtown San Diego. The Nook's studios are affordable by design and will deliver an innovative housing option to the downtown community.

The Nook will feature furnished units, averaging about 250 square feet – each with their own private bathroom and kitchenette, along with a fully appointed community room and outdoor space.

Through a partnership with the San Diego Housing Commission, all units will be income-restricted to 80% of area median income, with 8 units set aside for homeless veterans.

Nook East Village is expected to open in September 2018.

Total Development Cost: \$15 million

Architect: JWDA

Construction Lender: Umpqua Bank, San Diego Housing Commission

Developer: Trestle Development

General Contractor: Allgire General Contractors

Barrio Logan



Community and Business Development Manager, Luis Ojeda

Architecture and Planning, Mark Steele



BARRIO LOGAN PROMISE ZONE TOUR INFORMATION

Affordable Housing Units

Mercado Apartments - 2001 Newton Ave, San Diego, CA 92113

Built in 1994, the [Mercado Apartments](#) have been honored with numerous awards, including the Orchid Award for Environmental Solutions and Planning, the Nonprofit Federation's 1994 Project of the Year, and the prestigious Urban Land Institute award for "best integration of design." The 144-unit affordable housing complex, located on Newton Avenue, provides much-needed housing for hundreds in the Project Area.



Gateway Family Apartments - 1605 Logan Ave, San Diego, CA 92113

[Gateway Family Apartments](#) on Logan Avenue provides two- and three-bedroom units for 42 low- and very low-income families earning 30% to 60% of the area median income. The project includes community meeting space, outdoor recreation facilities, and has incorporated Universal Design features in all of the units. The project enhances the quality mix of housing options for families and has been recognized with the San Diego Housing Federation's Housing Project of the Year (Fewer than 50 Units) Award and the SDG&E Energy Efficiency & Sustainability Award.



La Entrada Family Apartments - 1755 Logan Ave, San Diego, CA 92113

Completed in 2009, Apartments provides 85 units of for-rent affordable housing for families that fall into eligible income guidelines. The project is located on the 1700 block of Logan Avenue and bounded by Sigsbee and Beardsley streets. It replaced five businesses and 13 residential units, creating seven times more housing than what had existed on the same footprint in a well-integrated design.



Los Vientos Family Apartments - 1668 National Ave, San Diego, CA 92113

Completed in 2009, the 89-unit [Los Vientos Family Apartments](#) is located at 1629 and 1668 National Avenue. Units are made affordable to low- and very low-income families with a household income of 30% to 60% of the area median income. In June 2010, the San Diego Housing Federation recognized Los Vientos with the Housing Project of the Year (More than 50 Units) award.



Estrella Del Mercado Apartments - 1985 National Ave, San Diego, CA 92113

The Mercado Apartments include the development of 91 multi-family affordable housing units that are available to households earning 30% to 60% of the area median income. Public amenities include art elements, pedestrian walkways, landscaping, and plazas to highlight the culture of Barrio Logan and connections to Chicano Park. The Mercado meets or exceeds the U.S. Green Building Council's requirements for LEED Certification. Construction began in March 2011 and was completed at the end of 2012.



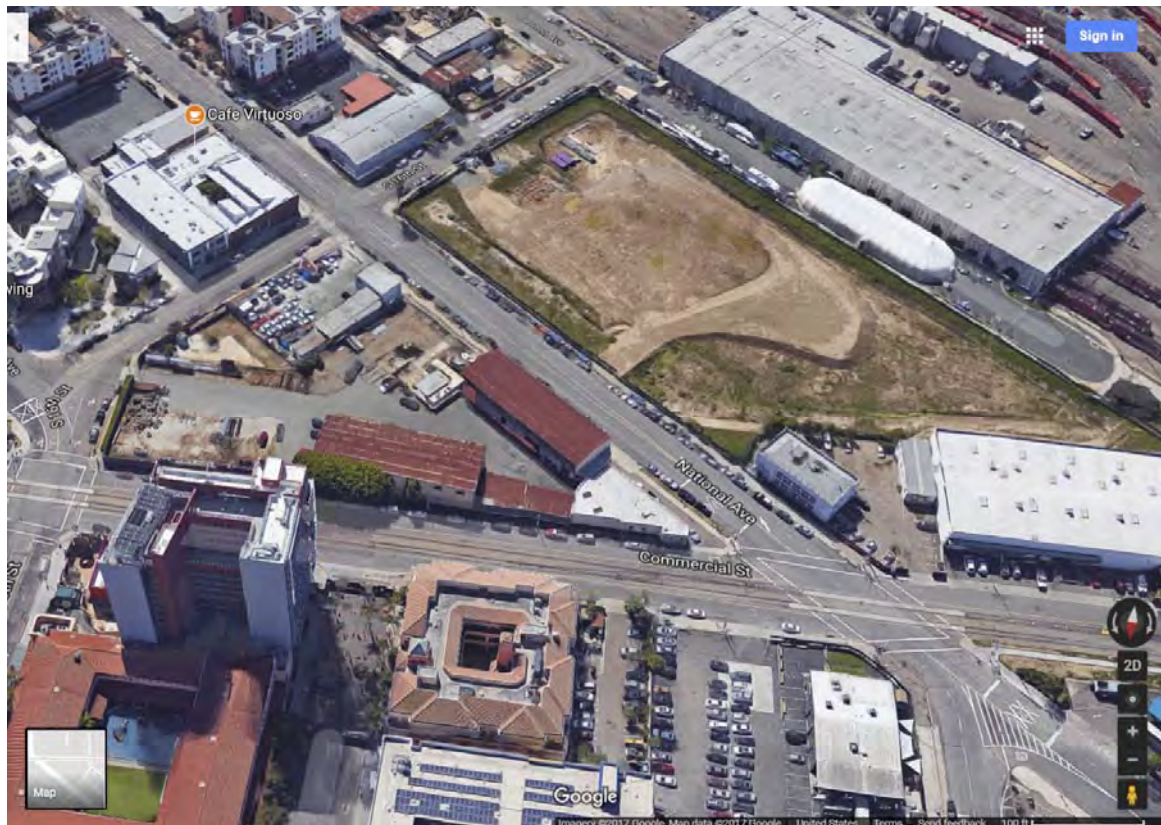
Mercado Del Barrio Commercial Center - 1101 Cesar E. Chavez Pkwy, SD, CA 92113

The Mercado provides for a unique residential and commercial mixed-use district within the “heart” of Barrio Logan. The Mercado site consists of two city blocks totaling approximately 6.8 acres, and is bounded by César Chávez Parkway to the north, the Coronado Bridge overpass and Chicano Park to the south, National Avenue to the east, and Main Street to the West. The Mercado will includes a Latino-themed supermarket, neighborhood retail shops, and restaurants.



Barrio Logan Areas for Development

National Avenue – 16th and Commercial



Dewey Street and Newton Avenue



1531 National Avenue – National and Sigsbee



Areas that are Planned for Development

Los Patios - 1776 National Avenue

Los Patios, a four-story development planned for Barrio Logan that will have 20 living units - 2 of which will rent to people who earn 30 percent to 50 percent of the region's median income. The plan is for a mixed-use building with 2100 square feet of commercial space on the ground floor and 20 living units above it. Because the plan includes two low-priced units, it wins the affordable-housing bonus; and the density bonus allows the developer to build 46 percent bigger - 6 more units on an additional floor than the 14 units allowed without bonuses. The project's architect, Hector Perez, is also a member of the planning group.



Barrio Flats - 2257-2275 Logan Avenue

38,375-square-foot, four-story, mixed-use building with 24 residential units, 10 hotel rooms & five retail spaces.



Logan Heights



Chief Executive Officer, Monte Jones
Economic Development Coordinator, Jeremy Haman



Background History

Greater Logan Heights (GLH) San Diego is a vibrant, diverse community located just east of Downtown San Diego. The western portion of the area was settled early in the city's history and was directly connected to the city center by streets and the railroad. The community was home to both large estates, where San Diego's elite lived, and modest cottages, where many working families lived. After World War II, with large tracts of rural land available in the eastern portion of the community, Greater Logan Heights experienced major physical and population growth. It was one of the few communities in San Diego with housing available to working class families and non-white residents. In the postwar period, freeways were also constructed around and through the neighborhood, bringing great changes to the neighborhood.

Today, Greater Logan Heights is one of the most culturally diverse and inclusive neighborhoods in San Diego. The community's distinct history and culture, legacy of diversity, and well-connected location have shaped its past and will continue to inform its future, through this Community Plan and the land use and development in the decades to come.

Location & Boundaries

Located just east of Downtown San Diego, the Greater Logan Heights community is located proximate to major employment and commercial centers in the South Bay and Downtown and linked to them by trolleys and buses. It is surrounded by several other community planning areas: Golden Hill and City Heights to the north, and Encanto Neighborhoods to the east. It also lies near major recreation facilities in Balboa Park and San Diego Bay. Although the community is divided by its freeways, the access that they provide is a key resource for the community.

- Current SF costs for leasing commercial property in Logan Heights ranges from \$15-\$30 SF/YR
- Three main economic/commercial corridors include; Imperial Avenue, Market Street and national Avenue.
- A wide variety of industrial and commercial uses occupy nearly 270 acres of land in Logan Heights and Southeastern San Diego.

Small Business Development Opportunities

BAME CDC works directly with local businesses through the CVBA as well as offering Small Business Resources on site and/or through one of our many partners. These Small Business Resources include, but are not limited to providing FREE business management, technical assistance and training for all phases of business development.



Paseo at COMM22, San Diego, CA



Co-developed by BRIDGE and MAAC, in partnership with San Diego Unified School District, Paseo at COMM22 provides 130 affordable apartment homes for families.

Affordable Units / Total Units: 130 / 130

Original Project Value: \$55,297,000 (Infrastructure and Family Housing phases)

Located within a four-acre, former SDUSD maintenance facility site, Paseo at COMM22 is part of a transit-oriented, master-planned community in the Logan Heights neighborhood of San Diego that also includes Victoria at COMM22, a 70-unit affordable housing property for seniors. Consisting of one-, two- and three-bedroom apartments, the community also includes 13 one-bedrooms of supportive housing that are filled on a referral basis. Amenities include onsite laundry, interior light wells for fresh air and light, a community room, a conference room, an arts and crafts room, an outdoor courtyard for residents, and an open plaza between buildings with public art. The development also includes 13,000 square feet of ground floor retail/commercial space. Paseo at COMM22 is certified as LEED for Homes – Platinum.

Architect: MVE + Partners

Contractors: Cannon Constructors (Housing), Hazard Construction (Infrastructure)

Financial Partners: San Diego Unified School District, City of San Diego/Civic San Diego, San Diego Housing Commission, California Department of Housing and Community Development, California Housing Finance Agency, County of San Diego Behavioral Health Services, California Pollution Control Finance Authority, SANDAG, Bank of America Merrill Lynch



Victoria at COMM22, San Diego, CA



Part of an intergenerational, master-planned, mixed-use development, Victoria at COMM22 provides 70 affordable apartment homes for seniors.



Affordable Units / Total Units: 70 / 70

Original Project Value: \$26,874,000 (Infrastructure and Senior Housing phases)

Co-developed by BRIDGE Housing and MAAC, in partnership with the San Diego Unified School District (SDUSD), Victoria at COMM22 is located within a four-acre, former SDUSD maintenance facility site that also includes Paseo at COMM22, a 130-unit affordable housing property for families.

Amenities include a community room, on-site laundry, outdoor courtyard and a library. Several units at Victoria are equipped with special features for people with mobility, hearing, and/or visual impairments. Meal delivery, exercise programs, and social/community building activities are also available. Also included in Victoria at COMM22, along 22nd Street is a 4,500 square foot space for a day care facility. Victoria at COMM22 is certified as LEED for Homes – Platinum.

Architect: MVE + Partners

Contractors: Cannon Constructors (Housing), Hazard Construction (Infrastructure)

Financial Partners: San Diego Unified School District, U.S. Department of Housing and Urban Development, California Department of Housing and Community Development, San Diego Housing Commission, California Pollution Control Finance Authority, SANDAG, Bank of America Merrill Lynch



COMM22 - San Diego, CA

Retail/Commercial Component

Paseo at COMM22

- **13,000 sf of Ground Floor Commercial Space along Commercial Street**
 - Community Medical Clinic - BRIDGE has leased 2,350 sf to Family Health Centers at the east end of the Family project, close to the Trolley station
 - 10,600 sf of additional community serving retail being marketed to local businesses, schools, and non-profits

Victoria at COMM22

- **4,500 sf of Ground Floor Commercial Space along Beardsley Street**
 - Child care facility (Children of the Rainbow) opened in fall 2016 and now serving local community

Future Development Phases

COMM22's catalytic development continues with two additional phases:

- **For-Sale Townhomes:** Habitat for Humanity is currently under construction on 11 for-sale affordable townhome units at the east end of the COMM22 site
- **Adaptive Reuse Apartments:** 33 for-rent units in renovated 1929 School District warehouse building adjacent to Seniors project; potential for new construction of an additional 24 units on adjacent vacant lot; project is in financial feasibility stage



COMM22 - San Diego (Commercial & 22nd)

about san diego habitat for humanity

San Diego Habitat for Humanity (SDHFH) is the local affiliate of Habitat for Humanity International and serves San Diego County. It is an autonomous 501(c)(3) nonprofit organization. It is governed locally, raises funds locally and builds locally.

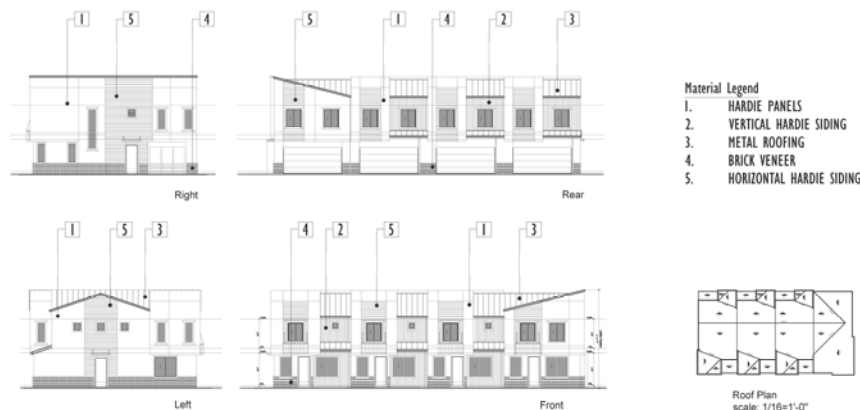
It is the mission of SDHFH to work in partnership with families to strengthen communities and transform lives by building new homes, rehabilitating existing homes, and making affordable homeownership a reality for people in need in San Diego County. Habitat was founded on the conviction that every man, woman and child should have a simple, decent and affordable home to live in dignity and safety.

homeownership program

Habitat's homeownership program is focused on creating homes for ownership by low-income families in need. Habitat partner families qualify for our program by showing a demonstrated need for improved housing, a willingness to partner with Habitat by committing to 250-500 hours of "sweat equity" helping to build their own homes, and the ability to repay the affordable mortgage. These mortgage payments create a revolving fund that Habitat uses to construct future homes for local families in need.

the community

San Diego Habitat for Humanity returns to the City of San Diego to build of 11 single family homes consisting of 3 and 4 bedroom units, ranging from 1,248 to 1,360 square feet. These homes, located at Commercial and 22nd in Logan Heights, have all been designed to meet Energy Star 3.0 energy efficiency. This community is made possible by a partnership with the City of San Diego, Bridge Housing, many generous building sponsors and countless volunteers. SDHFH will break ground in July of 2016 with an anticipated completion in March, 2019. The project budget is \$8.2 million.



COMM 22

San Diego Habitat for Humanity
19022 San Diego Mission Road
San Diego, CA 92113

4-PLEX ELEVATIONS

SAN DIEGO, CALIFORNIA

01/15/2016

01/15/2016

KTGY Group, Inc.
Architecture/Planning
17811 Via Ramona, Suite 200
Irvine, CA 92614
949.857.2130
ktgy.com

A3.0



Home Preservation



Logan Heights

San Diego Habitat for Humanity provides repair services to homeowners in Logan Heights!

San Diego Habitat for Humanity provee servicios de reparación a dueños de casa en Logan Heights!

services

exterior repairs
accessibility improvements
energy efficiency upgrades
sustainable landscaping
health and safety improvements

servicios

reparaciones de exterior
mejoras de accesibilidad
mejoras de eficiencia energetica
jardines sostenibles
mejoras de seguridad

how to qualify

own your home
show demonstrated need
willingness to partner with Habitat
meet income guidelines (80% AMI)

como calificar

ser propietario de su casa
demostrar la necesidad de reparaciones
complacencia de trabajar junto
con Habitat en las reparaciones
pautas de ingresos (80% AMI)

income guidelines

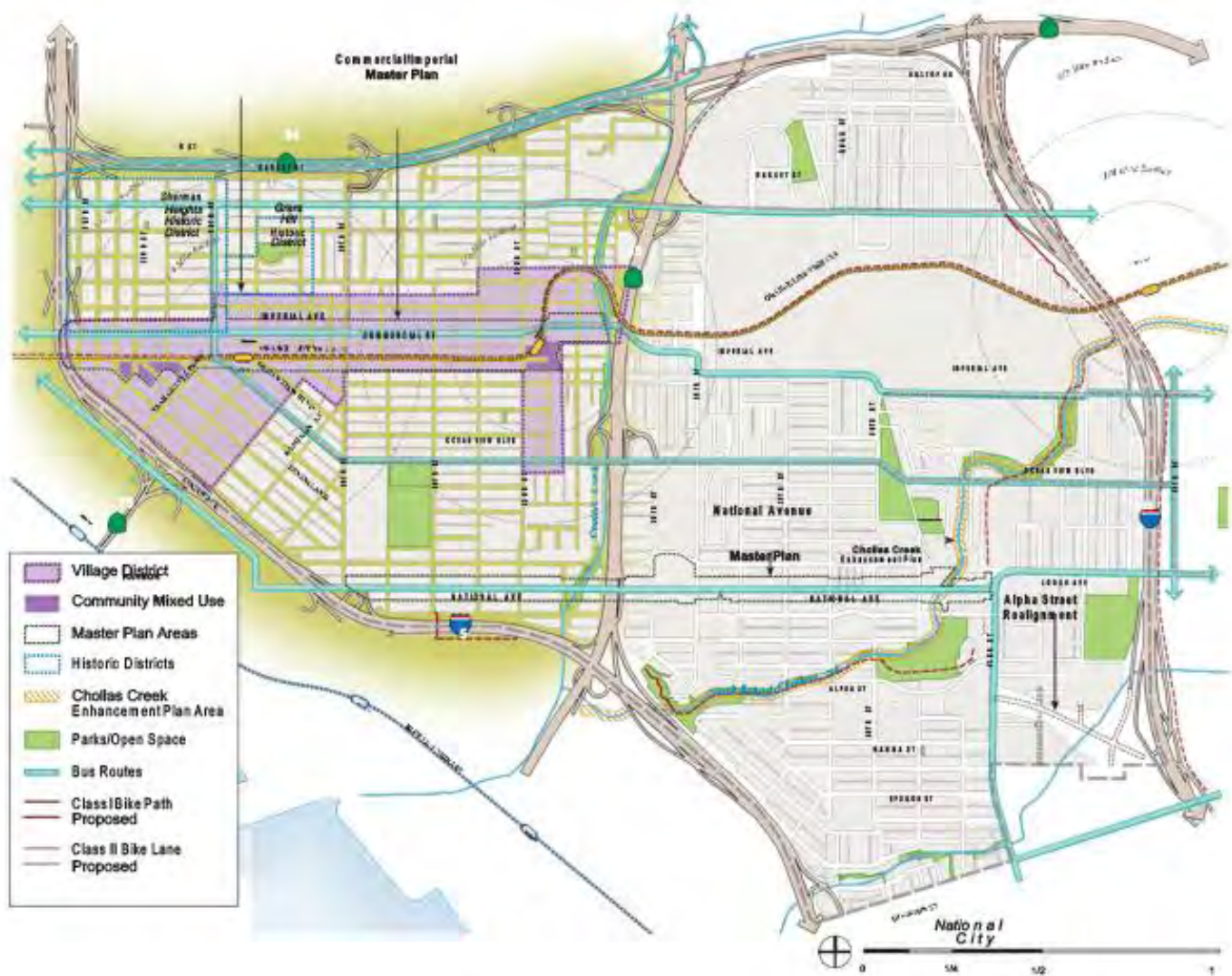
household size	maximum income
1	\$50,590
2	\$58,200
3	\$65,500
4	\$72,750
5	\$78,600
6	\$84,400

directrices de ingresos

tamano de la familia	ingreso bruto maximo
1	\$50,590
2	\$58,200
3	\$65,500
4	\$72,750
5	\$78,600
6	\$84,400

for more information, or to apply, please contact:
para mas informacion y como aplicar, favor contactar:

Roxana Mejia
roxanam@sdhfh.org
619-283-4663 x126



EXISTING LAND USES IN LOGAN HEIGHTS /SOUTHEASTERN SAN DIEGO

COMMUNITY PLAN LAND USE	ACRES	PERCENT
Single-family Housing	668	36%
Multifamily Housing	454	22%
Community Facilities	180	10%
Parks and Open Space	111	4%
Commercial Uses	164	8%
Industrial Uses and Utilities	133	5%
Cemeteries	213	14%
Vacant Land	65	1%
SUB-TOTAL	1,867	100%
Streets and Public Right-of-Way	1,062	

Greater Logan Heights is primarily residential with a mix of single-family homes and multi-family developments. There are large-scale commercial spaces, parks and school sites.

Greater Logan Heights consists of residential neighborhoods and commercial corridors, industrial areas, shopping and employment centers, and schools and other community amenities framed by the freeway system.

The community has a mix of single-family and multi-family housing in all neighborhoods. Commercial development is concentrated along the commercial corridors west of Highway 15 along Market Street, Imperial Avenue, and National Avenue.

Census Data

The most recent U.S. Census of Business was conducted in 2012, with information available only down to the zip code level. It shows a total of 496 businesses counted, including those in GLH and the other neighborhoods in the 92102 area. Table 1 below shows the total number of businesses by type and size in this zip code.

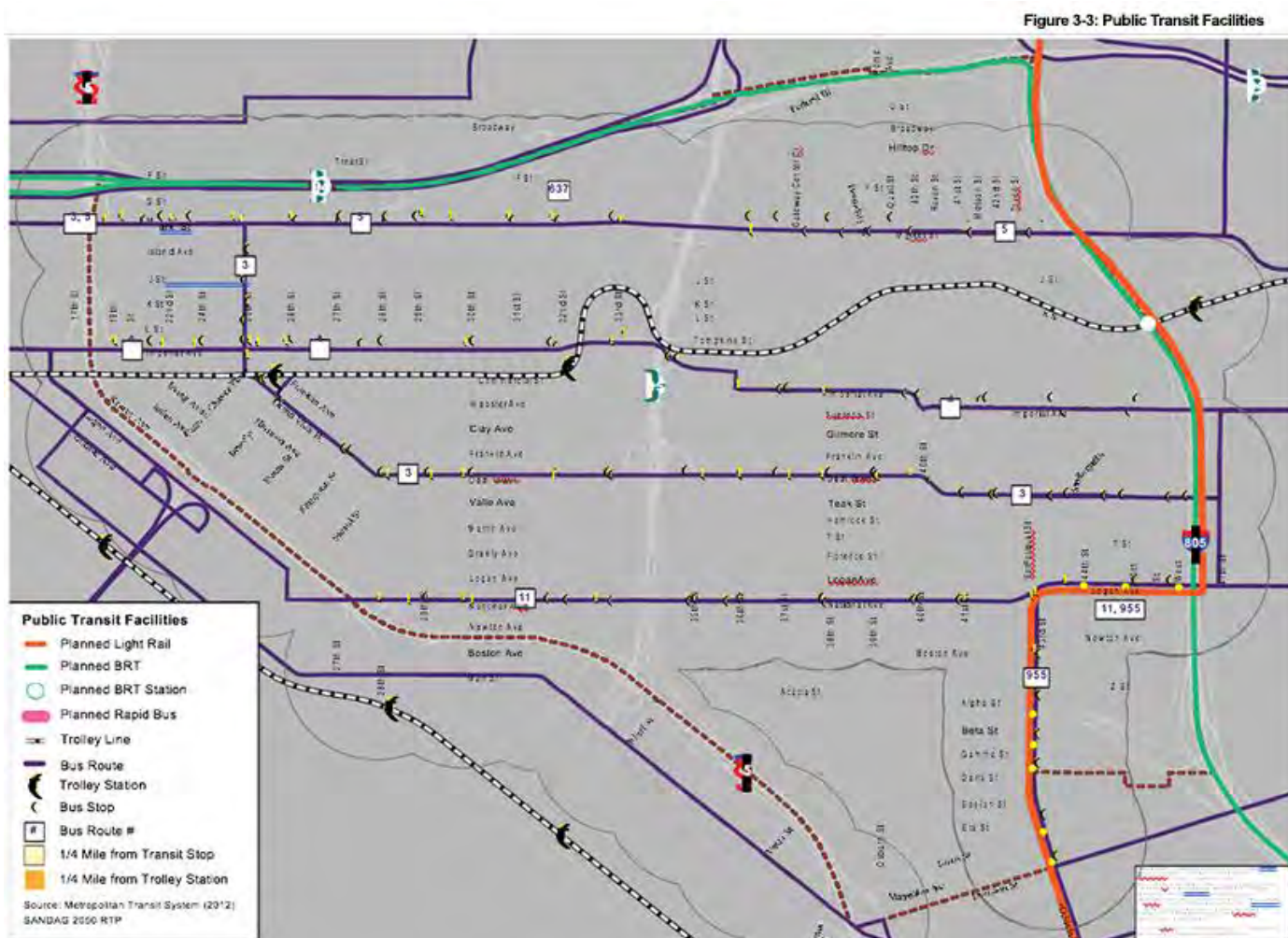
NAICS Code	Industry Description	Total	1-4	5-9	10-19	20+
22	Utilities	2	1	0	0	1
23	Construction	44	22	11	3	8
31	Manufacturing	17	3	4	2	8
42	Wholesale Trade	26	9	6	5	8
44	Retail Trade	73	48	8	11	8
48	Transportation and Warehousing	16	6	3	2	5
51	Information	7	4	1	0	2
52	Finance & Insurance	12	10	1	0	1
53	Real Estate, Rental & Leasing	29	21	8	0	0
54	Prof, Scientific & Tech Services	38	32	6	0	0
55	Management of Enterprises	8	1	1	2	4
56	Administrative and Waste	8	1	1	2	4
61	Educational Services	7	3	0	2	2
62	Health Care & Social Assistance	67	19	16	19	13
71	Arts, Entertainment & Recreation	5	2	1	1	1
72	Accommodation & Food Service	44	21	5	11	7
81	Other Services	63	38	10	9	6
<i>Total for all sectors</i>		<i>496</i>	<i>26</i>	<i>88</i>	<i>72</i>	<i>76</i>

Table 1. Census of Businesses in Zip Code 92102 // Number of Establishments by Employment Size

Of the total of 496 businesses in 92102, 260 (52%) are small, with one to five employees. The most prevalent business categories are retail, health care and social assistance, construction, accommodation and food service, professional and technical services, administrative services and waste management and other assorted service businesses.

The City of San Diego reports business licenses by zip code. This database is accurate to the last reporting year, so is very timely and comprehensive. It includes business storefronts, DBAs, home based businesses and multiple business licenses per location, so is much broader than the Census data. The San Diego City Treasurer's office currently shows 878 business licenses in the 92102 area, which is nearly double that shown in Table 1.

Greater Logan Heights/Southeastern San Diego is served by both local and regional transit with the Metropolitan Transit System (MTS) providing five bus routes and the Orange Line trolley service in the community as shown in Figure 3-3: Public Transit Facilities. Nearly all of Southeastern San Diego is within a quarter-mile of a transit stop.



There are very high transit demand nodes at the Orange Line trolley stations at 25th Street and 32nd Street; and at bus stops at 38th Street and 43rd Street along National Avenue. The San Diego Association of Governments (SANDAG) 2050 RTP includes the following planned transit improvements for this community, contingent on future funding:

- Local bus services would increase to 15-minute headways in 2020 and 10-minute headways in 2030.
- A new Bus Rapid Transit (BRT) route would serve the I-805 corridor from Otay Mesa to Sorrento Valley.
- A new rapid bus route would run between Spring Valley and San Diego State University traveling through Southeastern San Diego.
- A new rapid bus route would connect North Park and the 32nd Street Trolley Station.
- The Orange Line Trolley would have increased frequencies and an Orange Line Express would serve between El Cajon and Downtown San Diego.
- A new Light Rail Transit line would provide service between University Town Center and San Ysidro and travel through Southeastern San Diego.



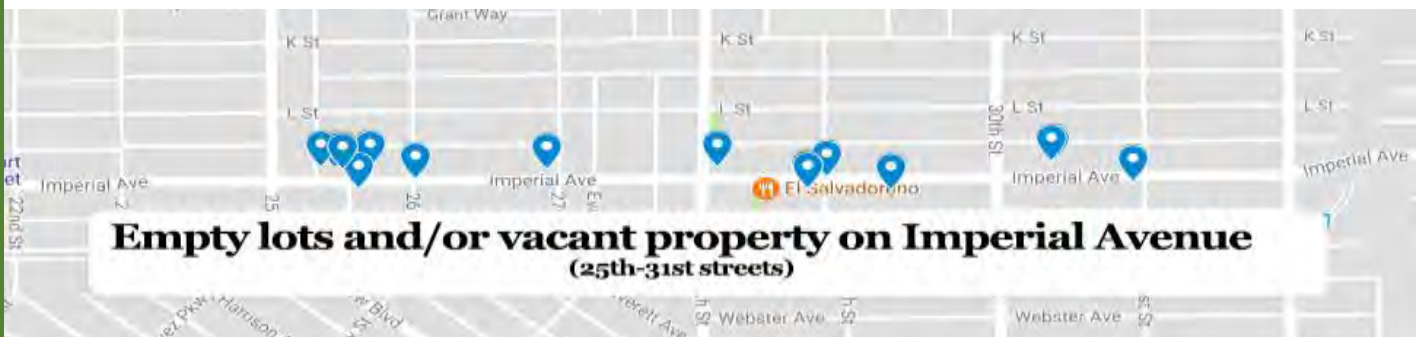
Logan Heights Real Estate

(INVENTORY SNAPSHOT BASED ON LOOPNET.COM)



For Lease

For Sale



Retail Leakage

source: SANDAG, Current Estimates (8/29/12) CPA: Community Plan Area				
Demographic Factor	Encanto CPA	Southeastern San Diego CPA	City of San Diego	County of San Diego
Number of Households	12,600	14,400	490,600	1,101,400
Average Household Size	3.76	3.94	2.59	2.76
Median Household Income	\$48,100	\$34,100	\$68,700	\$69,200
Population of Hispanic Ethnicity	51.8%	84.1%	29.4%	32.9%
Median Age (years)	30.0	27.3	34.1	34.8

The following information is from the 2013 Southeastern San Diego and Encanto Community Plan Market Demand Analysis by Keyser Martson Associates, Inc.

The largest employment sectors are Education and Health Services at 26.2%, followed by Retail Trade at 16.5%, and Other Services at 15.2%.

The retail sales import/export (leakage) model for the combined CPAs indicates a net export or leakage of approximately \$170 million per year. The term “leakage” as used here refers to retail sales occurring outside of the two CPAs by shoppers or residents from within the two CPAs. Categories in the combined CPAs that experience retail sales leakage are: Aggregated Confidential (General Merchandise, Other Comparison Goods, and Home Improvement) (\$62.3 million), Convenience Goods (\$100.9 million), and Eating and Drinking (\$20.9 million).

The following presents a summary of the KMA demand projection for each land use by decade:

Demand by Land Use					
Land Use	2012-2022		2022-2032		Total, 2012-2032
	Low	High	Low	High	Low - High
Commercial (SF) (1)	252,800	314,600	108,700	117,200	361,500 - 431,800
Residential (Units)	1,325	2,650	1,157	2,314	2,482 - 4,965
Industrial (SF)	34,000	67,000	34,000	67,000	68,000 - 134,000

(1) Includes office and retail/restaurant.

There is clearly a market demand for retail and restaurants in both Encanto and Southeastern San Diego. The demand for office space is limited to a few locations since the two areas are not recognized office locations. Limited demand for industrial space exists in Encanto and Southeastern San Diego.

Based on the low level of retail sales on a per-person basis, it is evident that the combined CPAs are experiencing a leakage (or export) of retail sales. Leakage refers to purchases made by residents of the CPAs outside of the CPAs' boundaries; the sales are "leaked" out to other communities. KMA prepared a retail sales import/export (leakage) model for the CPAs to measure this leakage by retail category. Essentially, the methodology employed consists of estimating the total potential retail expenditures of the CPAs' population, and then deducting the actual retail sales achieved within the CPAs.

KMA calculated the amount of potential retail expenditures by analyzing spending ratios in the City and County relative to population and per capita income. KMA then deducted from that total potential retail sales figure the actual 2011 retail sales for each retail category as provided by Municipal Services to the City of San Diego.

Based on this analysis, it appears that there is a **net export in retail sales of approximately \$170 million per year from the combined areas of Encanto and Southeastern San Diego**. The retail sales leakage is found in three categories: Convenience Goods (\$101 million), Aggregated Confidential (General Merchandise, Other Comparison Goods, and Home Improvement, for a total of \$62 million), and Eating and Drinking (\$21 million). These leakage figures are partially offset by retail sales import in the Automotive Outlets and Other Retail Stores categories.



IMPERIAL AVENUE BIKEWAY

FACT SHEET



Overview

The Imperial Avenue Bikeway will help create safer streets for people who walk, bike, drive, and take transit in the Southeastern San Diego Community. The 3-mile bikeway will provide improvements along Imperial Avenue between 17th Street and 47th Street. Potential project features include high-visibility crosswalks, curb extensions, raised crosswalks, separated and buffered bike lanes, shared lane markings, and other walking and bicycling enhancements that will improve safety for all roadway users. A future phase will provide improved connections to the community from Downtown San Diego.

The Need

The Imperial Avenue Bikeway is considered a priority project by SANDAG and is an important element of the San Diego Regional Bike Plan, which aims to make walking and biking a more convenient travel choice by creating an interconnected regional bike network. Completion of the project will help implement the community's vision to create a more pedestrian- and bike-friendly environment, as set forth in the recently adopted Southeastern San Diego Community Plan and Encanto Neighborhoods Community Plan. The project is also consistent with the City of San Diego's Climate Action Plan and addresses one of the City's Vision Zero high priority corridors.

Project Status

The project is currently in the planning phase. During this phase, the project team will analyze existing conditions, consider design options, and gather feedback from community members and local stakeholders to refine the project. Preliminary engineering

and environmental clearance is expected to occur from 2017-2018. The final design phase is anticipated in 2018-2020. Construction is anticipated in 2020-2022.

Opportunities to Get Involved

SANDAG is committed to collaborating with community stakeholders to gather input and develop a project that aligns with the active transportation vision laid out in local community plans. Interested stakeholders are encouraged to sign up to receive project updates via email by contacting the Project Manager. Stakeholders can also attend community events and presentations where team members will be available to answer questions. Questions and comments can be submitted at any time to Project Manager Chris Romano at chris.romano@sandag.org.

Opportunities for the community to get involved will be provided during all phases of project development.

Project Funding

Planning, environmental analysis, and design of the Imperial Avenue Bikeway is funded by *TransNet*, the regional half-cent sales tax for transportation administered by SANDAG. Construction will be funded by a grant from the state's Active Transportation Program. The project is part of the \$200 million Regional Bike Plan Early Action Program approved by the SANDAG Board of Directors in September 2013.

For More Information

Visit KeepSanDiegoMoving.com/ImperialAvenueBikeway or contact Project Manager **Chris Romano** at **(619) 699-6980** or chris.romano@sandag.org.



401 B Street, Suite 800
San Diego, CA 92101
(619) 699-1900
Fax (619) 699-1905
sandag.org





LEGEND

- Proposed Imperial Avenue Bikeway Alignment
- Existing and Planned Regional Bikeways
- Trolley Route and Stations
- School

Project Overview and Vision

The Imperial Avenue Bikeway Project will help to implement the community vision for safe biking and walking facilities established in the recently adopted Southeastern San Diego Community Plan and Encanto Neighborhoods Community Plan.

BAME Community Development Corporation

Bame Community Development Corporation has been serving the Greater Logan Heights neighborhoods since 1996. Our Mission: To strengthening residents and businesses in Greater Logan Heights neighborhoods through community empowerment, education and economic growth. BAME CDC's core programs include Small business Development, Neighborhood Beautification, our Future Achievers Preschool, the Career Financial Advancement Center (CFAC) and our community health program VIVA Life!

To better serve our community, and its needs, BAME CDC will be relocating from 2754 Imperial Avenue to 3040 Imperial Avenue. All of our programs will be available at the new location, but with some additions. At 3040 Imperial Avenue we will launch the first Co-Working Space in the Greater Logan Heights communities, complete with 9 workstations. Furthermore, 4 executive suites will be available for rent. Both the coworking spaces and executive suites will have access to the lobby, a commercial kitchen and conference and training room(s).



The cost of this publication was subsidized by LISC San Diego in partnership with the City of San Diego Community Development Block Grant (CDBG) funds provided by the US Department of Housing and Urban Development (HUD).

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Tables

The following tables are provided throughout the report.

Table 1: Census of Businesses in Zip Code 92102

Table 2: Inventory of Greater Logan Heights Businesses

Table 3: Demographics of GLH Area (One Mile Ring)

Table 4: Retail Spending Demand in GLH (One Mile Ring)

Table 5: Retail Market Potential Analysis Combined 92102 Area

Table 6: Retail Market Potential Summary Analysis Combined 92102 Area

Executive Summary

In a synergistic collaboration, the Lavin Entrepreneurship Center and the Small Business Consulting Center of San Diego State University has completed the Market Assessment and Mirco Entrepreneur Training of the Greater Logan Heights (GLH) neighborhood for the Local Initiatives Support Corporation (LISC) San Diego. The market assessment portion of the project was designed to provide the following insights:

- Determine demographics and spending potential of households in the GLH neighborhood and surrounding areas
- Conduct a “feet on the street” neighborhood business audit
- Estimate market sales potential in selected retail sectors, and
- Estimate retail sales leakage, that might be captured by GLH businesses

In addition, the team interviewed GLH business owners to better determine the needs of the business community, investigated local and national neighborhood revitalization efforts as they relate to mirco-entrepreneurship to gain a better understanding of what has contributed to the success of similar efforts and conducted micro-entrepreneur training sessions for current business owners and future entrepreneurs. Through the market analysis, it was determined that there may be a need for additional services related to many areas, including locksmith and home repair, general merchandise retailing, supermarkets and grocers, hair stylists, clothing and more, as outlined in this report. To develop a sustainable program for GLH, it is recommended that LISC consider incorporating the following ideas into their long-term strategy;

- Develop a network of communication channels that will allow for deep penetration into the neighborhoods,
- Focus on creating a culture of entrepreneurs providing more training throughout the lifecycle of community members starting as early as middle school ultimately changing the mindset of the community,
- Focus on building a sustainable 3-5 year program.

Ultimately, all of these efforts have been used to provide LISC San Diego necessary data and recommendations to assist the GLH area in transforming into a healthy and sustainable community of choice and opportunity.

Introduction

Since 1991, Local Initiatives Support Corporation (LISC) San Diego helps build the capacities of non-profit organizations and community groups assisting small business owners and other community stakeholders. LISC works with its community partners to transform neighborhoods into healthy and sustainable communities of choice and opportunity - good places to live, do business, work and raise children. Importantly, it recognizes that building sustainable, healthy communities requires a comprehensive approach to community needs. LISC supports this approach through striving to achieve the following:

- Expanding capital investment in housing and other real estate
- Increasing family income, wealth and employment
- Stimulating local economic activity and connections to the regional economy and beyond
- Improving access to quality education
- Supporting healthy environments and lifestyles

Recently, LISC San Diego sought a consultant to provide instructional material and research services in support of direct business development technical assistance being provided by LISC staff benefiting micro-entrepreneurs and small business owners in the Greater Logan Heights (GLH) neighborhood of San Diego. This effort is an expansion of an economic development program undertaken by LISC and a collaborative of community partners in 2013/2014, which was built around a community market and corresponding micro entrepreneurship activities. The overall purpose of the program is to build the capacity of the emerging entrepreneurs and businesses to start, expand and operate their businesses, help them build and understand their customer bases.

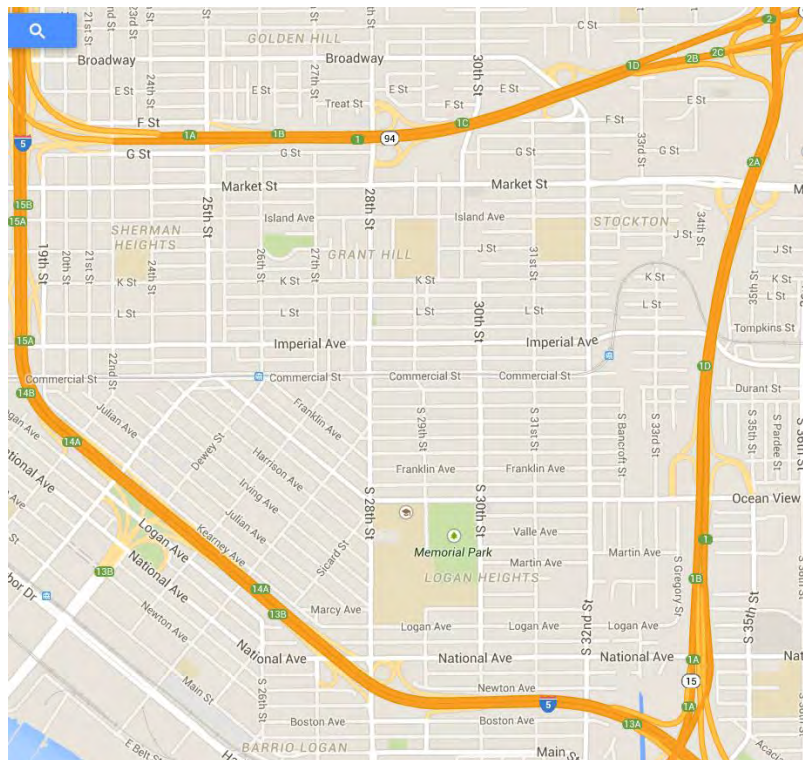
The Small Business Consulting Center and the Lavin Entrepreneurship Center at San Diego State University were tasked by LISC San Diego to provide this micro-entrepreneur market research and a training project for the GLH community. The Lavin Center provided the lead role on this project. The consultant team consisted of Don Sciglimpaglia (SBCC) and

Bernhard Schroeder (Lavin Entrepreneurship Center), assisted by Alissa Thompson, Jesse Robles and Raul Hernandez Ochoa (Lavin Entrepreneurship Center). Specifically, the market assessment portion of the project was designed to:

- Develop an inventory of businesses in the GLH area.
- Conduct outreach to selected businesses to better determine needs and to offer business assistance using a “feet on the street” neighborhood audit.
- Develop a comprehensive market analysis of the Greater Logan Heights community. The market study included an analysis of current and forecasted demographics and spending potential of households in the GLH neighborhood and surrounding areas. This resulted in an estimation of market sales potential in selected retail sectors and that might potentially be captured by GLH businesses.

Background

Greater Logan Heights (GLH) is comprised of five neighborhoods: Logan Heights, Sherman Heights, Stockton, Memorial and Grant Hill. These are part of the larger zip code 92102, which also includes the neighborhoods of South Park, Golden View, Golden Hill, Mt. Hope, Chollas View and a portion of Webster. Geographically, GLH is bordered on the north by Highway 94, to the east by I-15 and to the west by I-5, with these highways constituting the “triangle” of the neighborhood. Key geographic features include the Imperial Avenue commercial corridor, other commerce on Market Street, Ocean View Boulevard and National Avenue and the light industrial area along Commercial Street. Commercial Street also has the San Diego Trolley line, with stops at 25th Street and 32nd Street.



The area of Logan Heights and surrounding communities has a long and varied history. The Journal of San Diego History notes the following:

Logan Heights today is many things—exciting, confusing, a cross-cultural zone at once adjacent to the San Diego central business district and yet, to a large degree, distant from it. At one time the home of many of San Diego's premier houses and families, the area has ridden a roller coaster of economic and social fortunes and now offers a bewildering complex of single-family residences, apartments, businesses and industrial establishments. As is true with many older areas near a city center, Logan Heights today lacks definition and form; it is a necessary and perhaps inevitable victim of changing transportation systems, which take place in a town subject to long-term, large-scale growth. For many years the center of San Diego's black and Mexican-American populations, Logan Heights now shares that distinction with areas to the east and southeast and, to a lesser extent, with several other parts of the San Diego metropolitan area...

The decades since the 1920s resulted in continued growth of business and industry in Logan Heights. That Industrial growth has differed fundamentally from earlier growth in that newer economic enterprises, by and large, have taken over land formerly used for residential purposes. Residential displacement by industry has resulted in the further erosion of residential land values in the study area. The noise, odors, traffic, and associated problems have also hurt the community image of Logan Heights. The fight for Chicano Park, and the creation of the Barrio Logan concept, therefore, must be seen as attempts to re-establish a sense of neighborhood in an otherwise fragmented area...

As a result of the many recent land-use changes described above, Logan Heights today offers the visitor little of a sense of unity or of historical continuity. The many individual residences, however, in evidence from the relatively recent as well as distant past, are reminders of almost a century of population growth and change, an open page into a still largely unexplored sector of our local heritage.

Existing Businesses in GLH

Census Data

The most recent U.S. Census of Business was conducted in 2012, with information available only down to the zip code level. It shows a total of 496 businesses counted, including those in GLH and the other neighborhoods in the 92102 area. Table 1 below shows the total number of businesses by type and size in this zip code.

Table 1: Census of Businesses in Zip Code 92102

NAICS Code	Industry Description	Total	1-4	5-9	10-19	20+
22	Utilities	2	1	0	0	1
23	Construction	44	22	11	3	8
31	Manufacturing	17	3	4	2	8
42	Wholesale Trade	26	9	6	5	8
44	Retail Trade	73	48	8	11	8
48	Transportation and Warehousing	16	6	3	2	5
51	Information	7	4	1	0	2
52	Finance & Insurance	12	10	1	0	1
53	Real Estate, Rental & Leasing	29	21	8	0	0
54	Prof, Scientific & Tech Services	38	32	6	0	0
55	Management of Enterprises	8	1	1	2	4
56	Administrative and Waste Management	8	1	1	2	4
61	Educational Services	7	3	0	2	2
62	Health Care & Social Assistance	67	19	16	19	13
71	Arts, Entertainment & Recreation	5	2	1	1	1
72	Accommodation & Food Service	44	21	5	11	7
81	Other Services	63	38	10	9	6
<i>Total for all sectors</i>		<i>496</i>	<i>26</i>	<i>88</i>	<i>72</i>	<i>76</i>

Number of Establishments by Employment Size

Of the total of 496 businesses in 92102, 260 (52%) are small, with one to five employees. The most prevalent business categories are retail, health care and social assistance, construction, accommodation and food service, professional and technical services, administrative services and waste management and other assorted service businesses.

The City of San Diego reports business licenses by zip code. This database is accurate to the last reporting year, so is very timely and comprehensive. It includes business storefronts, DBAs, home based businesses and multiple business licenses per location, so is much broader than the Census data. The San Diego City Treasurer's office currently shows 878 business licenses in the 92102 area, which is nearly double that shown in Table 1.

Development of GLH Business Inventory

For this project, a number of methods were used to develop a comprehensive inventory of GLH businesses. The initial process began with a list of 168 businesses provided by LISC. Then, a list from the Reference USA database was consulted, which is based on business phone data and follow-up telephone surveys. Next, the LISC and Reference USA lists were cross-referenced with a database of business licenses that was acquired from the San Diego City Treasurer's office. Both of the latter lists included the entire 92102 area. To narrow this to the GLH area, all addresses outside of our parameter were eliminated. Finally, during April and May, 2015, two members of the research team conducted an on-site street audit to check for new businesses and to verify existing ones. In the verification process it became clear that it would be difficult or impossible to accurately verify all businesses due to the number of business addresses that were personal homes. In total, we identified 546 businesses in GLH that may currently be serving the community. Some are home based businesses. Others, such as Cintas, operate multiple businesses from a single location, with differing key contact persons. We provide this more expansive list for future investigation and marketing efforts.

Table 2 Inventory of Greater Logan Heights Businesses

Business Category	Number
Services	161
Industrial	77
Retail	58
Food	57
Auto Maintenance and Repair	36
Food Market	29
Health and Beauty	20
Healthcare	15
Financial services	15
Entertainment	9
Auto Sales	4
Other or Unverified	65
Total	546

In addition to merely creating a list of businesses, we attempted to develop a more complete database for future use. As a deliverable product, we constructed a spreadsheet (File 1) which lists the following information, were attainable, for each business:

- Business name
- Key contact
- Address
- Phone number
- Neighborhood
- Business start date (were available, from City of San Diego)
- Business category (2 digit NASICS codes & LISC summary codes)

- Estimated sales volume (were available, from Reference USA)
- Estimated number of employees (were available, from Reference USA)
- Central Village Business Association status
- Website (were available)
- Business e-mail (were available)

Outreach to Businesses

In addition to analyzing the data provided throughout a variety of databases, the team, in conjunction with LISC, selected a number of businesses to interview to help gain a better understanding of the needs within the community. Owners or key contacts for the following twelve businesses were interviewed, with detailed interviews found in Appendix A:

- Antojitos Colombianos
- 3-in-1 Design
- Albritten Tax Service
- The Lab Barber Shop
- King Optical
- J & C Auto Service
- Kar Auto Sound
- Rock Your Look Salon
- Cachanillas's Auto Service
- Las Morelianas
- Cesar's Auto Electric
- Villa Auto Report Electric

An additional thirteen companies were contacted for interviews. Two asked not to be interviewed and the additional eleven did not respond to multiple phone calls and in person attempts to communicate.

During the survey processes, the interviewers focused on topics concerning demographics, customer information and patterns, business strategies, marketing, growth opportunities and challenges, and opportunities associated with conducting business in GLH. Through these interviews it was concluded that, in general, there is a lack of awareness on where to gain critical information on key business practices. For example, during the interviews the team heard from multiple businesses that owners believe that to acquire a sign permit from the City of San Diego would cost their business hundreds to thousands of dollars. In reality, using a quick Google search, it was shown that this belief was inaccurate. Other issues related to the City of San Diego and running a business in GLH related to the lack of proper lighting, strict regulations and lack of access to critical business information. During these interviews there were significant concerns stated related to the business growth in this community. Several business owners noted that they feel that business has been declining in the neighborhood and that a significant portion of their business is now coming from outside of the neighborhood.

In addition to these interviews, the team also visited the Sobreruedas en el Barrio Neighborhood Sunday Market in GLH. It was through communication with booth owners at this marketplace that the team learned the importance of working with the churches and schools to promote business activity within the community. Those two entities are the strongest networks within these neighborhoods. Utilizing both schools and churches as marketing change agents can strengthen the communication between business owners and the community.

Business Associations

The Greater Logan Heights community is served by two business associations or organizations; the Central Village Business Association and the BAME Community Development Corporation.

Central Village Business Association

The Central Village Business Association (CVBA) was organized with the mission to unite the local small business community. Volunteers supporting the CVBA strive to bring together businesses and professionals within the community who are focused on promoting, improving, and advancing the business climate of GLH. The CVBA has three initiatives that drive its mission:

1. To promote business and business relationships among its membership.
2. To serve as a voice for the neighborhood looking out for the community's interest in relation to City of San Diego politics, government activities and community affairs.
3. Ultimately, to provide members with services, resources, and technical assistance.

Membership is offered to the local business community utilizing a tiered pricing structure. As benefits, CVBA members receive the following:

- Monthly general meetings and meeting minutes
- The opportunity to network with fellow business owners and neighbors
- Participate in special events as well as discounts on seminars and trainings
- Be informed on the changes and growth in the business community
- Business listed on the www.bamecdc.org website
- Access to governmental programs/services for business improvements

BAME Community Development Corporation

BAME Community Development Corporation (BAME CDC) was established in June of 1995. The congregation members of the Bethel Memorial African Methodist Episcopal

Church of San Diego were the driving force behind the birth of BAME CDC. It was designed as a 501 (c)(3) with a focus on providing strong infrastructure to the community that promotes a healthy, sustainable, and vibrant community. The organization works within the Grant Hill, Logan, Memorial, Sherman, and Stockton neighborhoods with a mission to strengthen and build a stronger future for these neighborhoods by focusing on business, community and economic development. In its origin, BAME CDC recognized that its own community members have the abilities and resources that could be harvested to solve community problems. With the support of their community, BAME CDC determined that, by investing in the families and individuals within the community, that all residents would be encouraged and supported to continue to work together to build a stronger community.

The generous financial sponsors within the greater San Diego community have made BAME CDC possible. To ensure the sponsorship funding is being effectively and efficiently used a ten member board of trustees oversees the strategic initiatives of the organization. To help execute the programing the organization is lead by four full time staff. Some of the key financial sponsors include Wells Fargo Bank, LISC San Diego, San Diego BID Council, CECO, US Bank, SCORE, California Family Health Council and Pacific Western Bank.

It is through the financial sponsors that BAME CDC is able to offer it's programing to members at no cost. The organization is open to all members of the community. BAME CDC offers the community members four key programs: Neighborhood Beautification, Community Health, Small Business Development and Career Financial Advancement Center. These programs include basic education, hands-on support, and information and referrals. In addition to programs, BAME CDC offers a number of services including transportation, food pantry (food stamp preparation), a summer lunch program and more.

Market Analysis

Demographic Analysis

To determine the demographic makeup of Greater Logan Heights, we utilized a sophisticated database source provided by Experian, Inc., which uses U.S. Census data and additional proprietary systems for area analysis. We conducted a ring study using radii of one, five and ten miles. The one-mile ring, which was the smallest radius available for the study, is the basis for our discussion below, but all the data (including the results for the five and ten mile rings) are provided on File 2. Since the GLH area is geographically very small, we centered the analysis at Imperial Avenue and 26th Street. Note that this area also spills somewhat to the north and south, notably including the neighborhood of Barrio Logan, but contains the GLH area well.

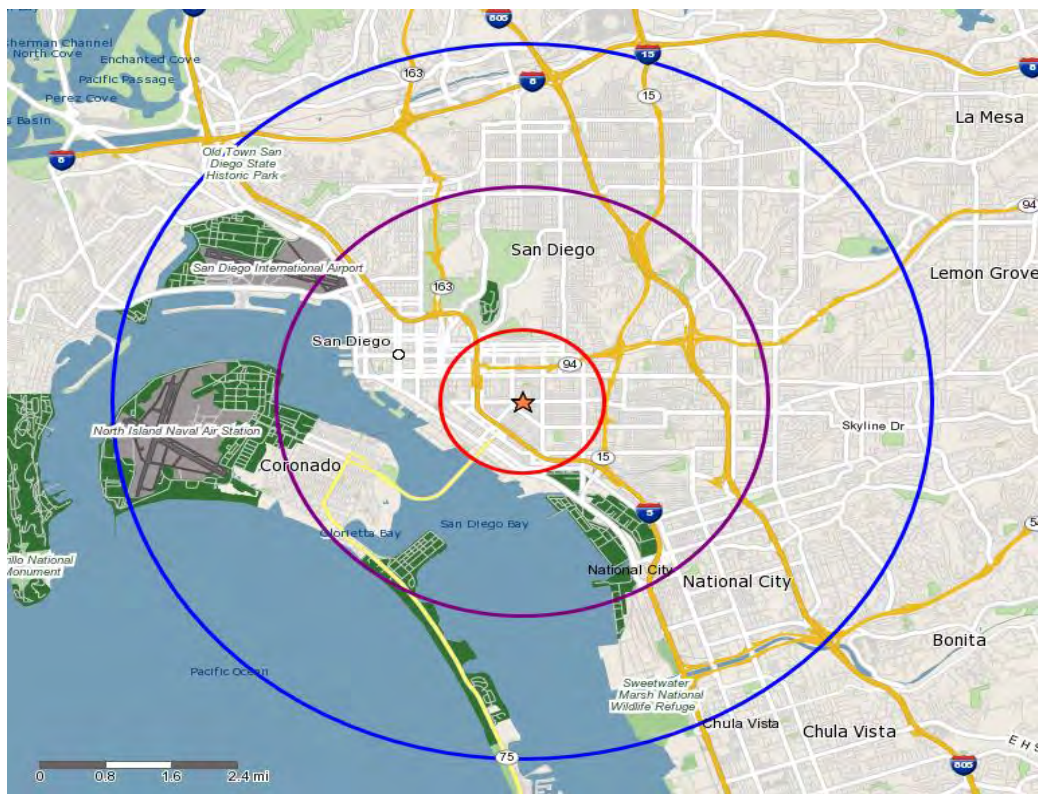


Table 3: Demographics of GLH Area (One Mile Ring)

Demographics	Statistics
Total Population	45,554
Total Households	15,047
% Female	47.3%
% Male	52.7
Employment	
White Collar	42.2%
Blue Collar	57.8%
Age	
Age 0 – 4	7.6%
Age 5 – 14	13.2%
Age 15 – 19	6.9%
Age 20 – 24	9.2%
Age 25 – 34	21.6%
Age 35 – 44	15.9%
Age 45 – 54	11.9%
Age 55 – 64	7.7%
Age 65 – 74	3.6%
Age 75 – 84	1.8%
Age 85+	0.7%
Median Age	31.0
Owner Occupied Housing Units	15,047
Owner Occupied Free & Clear	3.7%
Owner Occupied with a mortgage or loan	15.4%
Renter Occupied Housing Units	80.9%
Ethnicity	
Hispanic Ethnicity	69.8%
Not of Hispanic Ethnicity	30.2%
Age 15+ Population	36,098
Divorced	10.0%
Never Married	53.2%
Now Married	34.4%
Now Married – Separated	4.5%
Widowed	2.4%

Total Population Age 25+	28,756
Grade K-8	14.7%
Grade 9-12	17.3%
High School Graduate	23.0 %
Associates Degree	6%
Bachelor's Degree	12.0%
Graduate Degree	5.1%
Some College, No Degree	18.2%
No Schooling Completed	2.8%
Income \$0 - \$9,999	11.9%
Income \$10,000 - \$14,999	10.8%
Income \$15,000 - \$24,999	18.7%
Income \$25,000 - \$34,999	13.5%
Income \$35,000 - \$49,999	15.2%
Income \$50,000 - \$74,999	13.2%
Income \$75,000 - \$99,999	7.4%
Income \$100,000 - \$124,999	4.4%
Income \$125,000 - \$149,999	2.1%
Income \$150,000+	3.1%
Average Household Income	\$46,483
Median Household Income	\$31,456
Per Capita Income	\$16,198
Automobiles	
0 Vehicles Available	18.2%
1 Vehicle Available	46.7%
2+ Vehicles Available	35.1%
Average Vehicles per Household	1.60
Total Vehicles Available	24,018

Recognizing that the one mile ring used in this study contains the GLH target area, but also spills somewhat outside of the area, we will use these results to describe the area. The study shows that the GLH area is made up of 15,047 households, with a total population of 45,554 persons, with a median age of 31 years. Roughly 70% of the population is Hispanic and 80% of the households are rentals. Roughly six in ten are employed in blue collar jobs and roughly the same proportion of adults has a high school education or less formal schooling. The average household earns \$46,483 and has 1.6 vehicles.

Spending Analysis

Using Experian data, which is based on household spending surveys combined with census data, we were able to estimate the spending by the average GLH household and in aggregate for the entire area. The demand data is derived from the Consumer Expenditure Survey (CE Survey, or CEX), which is fielded by the U.S. Bureau of Labor Statistics (BLS). The supply data is derived from the Census of Retail Trade (CRT), which is made available by the U.S. Census. This is shown in Table 4 below.

Table 4: Retail Spending Demand in GLH (One Mile Ring)

	Per GLH Household	GLH Area Total
Building Material & Garden Equipment & Supply Dealers	\$423.37	\$6,379,217
<i>Building Material & Supply Dealers</i>	\$355.37	\$5,347,108
Hardware Stores	\$30.35	\$456,645
Home Centers	\$193.89	\$2,917,361
Other Building Material Dealers	\$114.83	\$1,727,862
Paint and Wallpaper Stores	\$16.30	\$245,239
<i>Lawn & Garden Equipment & Supplies Stores</i>	<i>\$68.00</i>	<i>\$1,023,109</i>
Nursery & Garden Centers	\$60.47	\$909,833
Outdoor Power Equipment Stores	\$7.53	\$113,276
Clothing & Clothing Accessories Stores	\$750.46	\$11,291,915
<i>Clothing Stores</i>	<i>\$554.27</i>	<i>\$8,339,894</i>
Children's and Infants Clothing Stores	\$34.16	\$513,958
Clothing Accessories Stores	\$17.67	\$265,925
Family Clothing Stores	\$299.45	\$4,505,693
Men's Clothing Stores	\$33.20	\$499,600
Other Clothing Stores	\$36.44	\$548,328
Women's Clothing Stores	\$133.35	\$2,006,389
<i>Jewelry, Luggage & Leather Goods Stores</i>	<i>\$54.42</i>	<i>\$818,808</i>
Jewelry Stores	\$48.65	\$732,006
Luggage & Leather Goods Stores	\$5.77	\$86,802
<i>Shoe Stores</i>	<i>\$141.77</i>	<i>\$2,133,213</i>
Electronics & Appliance Stores	\$273.77	\$4,119,287
Appliance, Television and Other Electronics Stores	\$220.78	\$3,321,943
Household Appliances Stores	\$57.37	\$863,178
Radio, Television and Other Electronics Stores	\$163.41	\$2,458,766
Camera & Photographic Equipment Stores	\$12.94	\$194,750
Computer and Software Stores	\$40.05	\$602,594

Food & Beverage Stores	\$2,979.00	\$44,823,811
Beer, Wine, & Liquor Stores	\$122.65	\$1,845,435
Grocery Stores	\$2,750.87	\$41,391,238
Convenience Stores	\$103.98	\$1,564,545
Supermarkets and Other Grocery (except Convenience) Stores	\$2,646.89	\$39,826,693
Specialty Food Stores	\$105.48	\$1,587,138
Foodservice & Drinking Places	\$2,463.23	\$37,063,289
Drinking Place - Alcoholic Beverages	\$81.94	\$1,232,982
Full-service Restaurants	\$1,170.97	\$17,619,078
Limited-service Eating Places	\$1,196.87	\$18,008,853
Special Foodservices	\$13.45	\$202,376
Furniture & Home Furnishings Stores	\$324.35	\$4,880,439
Furniture Stores	\$218.38	\$3,285,831
Home Furnishing Stores	\$105.98	\$1,594,609
Gasoline stations	\$2,638.05	\$39,693,684
General Merchandise Stores	\$2,267.60	\$34,119,730
Department Stores excluding leased depts	\$687.42	\$10,343,272
Other General Merchandise Stores	\$1,580.19	\$23,776,457
General Merchandise, Apparel and Accessories, Furniture and Other Sales	\$3,972.24	\$59,768,728
Health & Personal Care Stores	\$424.44	\$6,386,428
Cosmetics, Beauty Supplies and Perfume Stores	\$15.92	\$239,493
Optical Goods Stores	\$18.99	\$285,725
Other Health and Personal Care Stores	\$23.20	\$349,149
Pharmacies and Drug Stores	\$366.33	\$5,512,061
Miscellaneous Store Retailers	\$350.65	\$5,276,086
Florists	\$9.31	\$140,138
Office Supplies, Stationery, & Gift Stores	\$108.51	\$1,632,715
Gift, Novelty, and Souvenir Stores	\$47.65	\$716,994
Office Supplies and Stationery Stores	\$60.86	\$915,721
Other Miscellaneous Store Retailers	\$203.38	\$3,060,214
Used Merchandise Stores	\$29.44	\$443,018
Motor Vehicle & Parts Dealers	\$2,780.74	\$41,840,662
Automotive Dealers	\$2,454.29	\$36,928,773
Automotive Parts, Accessories, & Tire Stores	\$188.07	\$2,829,743
Other Motor Vehicle Dealers	\$138.38	\$2,082,146
Nonstore retailers	\$716.54	\$10,781,516

Sporting Goods, Hobby, Book, & Music Stores	\$247.54	\$3,724,642
Book, Periodical, & Music Stores	\$87.69	\$1,319,490
Book Stores and News Dealers	\$78.00	\$1,173,681
Book Stores	\$73.95	\$1,112,765
News Dealers and Newsstands	\$4.05	\$60,915
Prerecorded Tape, Compact Disc, and Record Stores	\$9.69	\$145,809
Sporting Goods, Hobby, & Musical Instrument Stores	\$159.85	\$2,405,152
Hobby, Toys and Games Stores	\$38.81	\$584,024
Musical Instrument and Supplies Stores	\$15.49	\$233,012
Sew/Needlework/Piece Goods Stores	\$14.96	\$225,094
Sporting Goods Stores	\$90.59	\$1,363,022
Total Avg Annual Retail Demand (not including GAFO)	\$16,639.75	\$310,140,435

Table 4 contains an estimate of how much each household spends per year by category and where that money is spent, with the average GLH household spending \$16,640 per year. For example, the average household in the area spends \$30.35 annually at hardware stores, which totals \$456,645 in aggregate. This is based on \$30.35 per household multiplied by 15,047 households, or \$456,676, with the difference due to estimation and rounding error. The total expenditure (average retail demand) in GLH is estimated to be over \$310 million. This is the addressable market for which businesses in GLH can compete.

Market Potential Analysis

To assess the market potential for the GLH area we utilized Nielsen Retail Market Power (RMP) data, allows analysis of supply and demand at a defined geographic level. A comparison can be achieved at the retail outlet level or the merchandise line level. An opportunity gap appears when household expenditure levels for a specific geographical area are higher than the corresponding retail sales estimates. This difference signifies that resident households are meeting the available supply and supplementing their additional demand potential by going outside of their own geography. The opposite is true in the event of an opportunity surplus, that is, when the levels of household expenditures are lower than the retail sales estimates. In this case, local retailers are attracting residents of other areas in to their stores. RMP is derived from two major sources of information. The demand data is derived from the Consumer Expenditure Survey (CE Survey, or CEX), which is fielded by the U.S. Bureau of Labor Statistics (BLS). The supply data is derived from the Census of Retail Trade (CRT), which is made available by the U.S. Census. Additional data sources are incorporated to create both supply and demand estimates. In this case, the smallest area of analysis available is the 92102 zip code, since the above data are available only down to the zip code level. The results for this area are shown below in Table 5.

Table 5: Retail Market Potential Analysis Combined 92102 Area

Retail Stores	2015 Demand (Consumer Expenditures)	2015 Supply (Retail Sales)	Opportunity (Gal/Surplus)
Total Retail Sales & Eating, Drinking Places	\$534,835,771	\$428,598,323	\$106,237,448
Motor Vehicle & Parts Dealers-441	93,579,516	14,330,487	79,249,029
Automotive Dealers-4411	78,976,018	4,317,147	74,658,871
Other Motor Vehicle Dealers-4412	7,888,442	661,227	7,227,215
Automotive Parts/Accessories, Tire Stores-4413	6,715,056	9,352,113	(2,637,057)
Furniture & Home Furnishings Stores-442	9,524,526	3,660,889	5,863,637
Furniture Stores-4421	4,985,234	1,569,324	3,415,910
Home Furnishing Stores-4422	4,539,292	2,091,565	2,447,727
Electronics & Appliances Stores-443	9,936,936	1,570,777	8,366,159
Appliance, TV, Electronics Stores-44311	7,805,256	1,372,347	6,432,909

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Household Appliances Stores-443111	1,302,147	59,366	1,242,781
Radio, Television, Electronics Stores-443112	6,503,109	1,312,981	5,190,128
Computer & Software Stores-44312	1,924,926	195,898	1,729,028
Camera & Photographic Equipment Stores-44313	206,754	2,532	204,222
Building Material, Garden Equipment Stores -444	46,045,566	9,570,396	36,475,170
Building Material & Supply Dealers-4441	39,296,099	9,220,826	30,075,273
Home Centers-44411	16,469,025	1,740,357	14,728,668
Paint & Wallpaper Stores-44412	596,806	0	596,806
Hardware Stores-44413	4,542,692	1,743,141	2,799,551
Other Building Materials Dealers-44419	17,687,576	5,737,328	11,950,248
Building Materials, Lumberyards-444191	6,866,153	2,145,801	4,720,352
Lawn/Garden Equipment/Supplies Stores-4442	6,749,467	349,570	6,399,897
Outdoor Power Equipment Stores-44421	1,809,564	323,093	1,486,471
Nursery & Garden Centers-44422	4,939,903	26,477	4,913,426
Food & Beverage Stores-445	74,904,775	61,484,102	13,420,673
Grocery Stores-4451	50,515,143	53,891,591	(3,376,448)
Supermarkets, Grocery Stores-44511	47,403,820	52,410,767	(5,006,947)
Convenience Stores-44512	3,111,323	1,480,824	1,630,499
Specialty Food Stores-4452	6,473,637	1,809,244	4,664,393
Beer, Wine & Liquor Stores-4453	17,915,995	5,783,267	12,132,728
Health & Personal Care Stores-446	26,282,736	5,816,191	20,466,545
Pharmacies & Drug Stores-44611	20,791,881	5,478,252	15,313,629
Cosmetics, Beauty Supplies, Perfume Stores-44612	1,782,798	24,002	1,758,796
Optical Goods Stores-44613	1,336,541	239,138	1,097,403
Other Health & Personal Care Stores-44619	2,371,516	74,799	2,296,717
Gasoline Stations-447	53,277,207	49,475,971	3,801,236
Gasoline Stations with Convenience Stores-44711	38,883,169	47,441,823	(8,558,654)
Other Gasoline Stations-44719	14,394,038	2,034,148	12,359,890
Clothing & Clothing Accessories Stores-448	25,531,007	5,190,905	20,340,102
Clothing Stores-4481	15,087,053	4,326,350	10,760,703
Men's Clothing Stores-44811	729,164	40,807	688,357
Women's Clothing Stores-44812	3,277,660	1,776,556	1,501,104
Children's, Infants' Clothing Stores-44813	996,611	1,794,717	(798,106)
Family Clothing Stores-44814	8,186,263	531,120	7,655,143
Clothing Accessories Stores-44815	642,992	67,406	575,586
Other Clothing Stores-44819	1,254,363	115,744	1,138,619
Shoe Stores-4482	2,507,866	383,197	2,124,669
Jewelry, Luggage, Leather Goods Stores-4483	7,936,088	481,358	7,454,730
Jewelry Stores-44831	6,882,079	481,358	6,400,721
Luggage & Leather Goods Stores-44832	1,054,009	0	1,054,009
Sporting Goods, Hobby, Book, Music Stores-451	9,921,206	5,397,390	4,523,816
Sporting Goods, Hobby, Musical Inst Stores-4511	8,633,284	5,139,473	3,493,811

Sporting Goods Stores-45111	4,599,475	4,935,979	(336,504)
Hobby, Toy & Game Stores-45112	2,452,773	4,152	2,448,621
Sewing, Needlework & Piece Goods Stores-45113	728,796	0	728,796
Musical Instrument & Supplies Stores-45114	852,240	199,342	652,898
Book, Periodical & Music Stores-4512	1,287,922	257,917	1,030,005
Book Stores & News Dealers-45121	1,094,788	103,087	991,701
Book Stores-451211	964,271	100,864	863,407
News Dealers & Newsstands-451212	130,517	2,223	128,294
Prerecorded Tape, CD, Record Stores-45122	193,134	154,830	38,304
General Merchandise Stores-452	67,526,147	201,128,086	(133,601,939)
Department Stores, Excl Leased Departments-4521	28,871,563	8,053,695	20,817,868
Other General Merchandise Stores-4529	38,654,584	193,074,391	(154,419,807)
Miscellaneous Store Retailers-453	12,631,960	5,070,179	7,561,781
Florists-4531	459,586	295,922	163,664
Office Supplies, Stationery, Gift Stores-4532	6,374,090	972,597	5,401,493
Office Supplies & Stationery Stores-45321	2,874,368	0	2,874,368
Gift, Novelty & Souvenir Stores-45322	3,499,722	972,597	2,527,125
Used Merchandise Stores-4533	1,156,874	1,558,860	(401,986)
Other Miscellaneous Store Retailers-4539	4,641,410	2,242,800	2,398,610

Thus, for the entire 92102 area, the total retail demand is estimated to be \$534,835,771, with supply of \$428,598,323, resulting in a net “opportunity” surplus of \$106,237,448. Some categories have very significant surpluses, such as automotive dealerships, service stations and home centers, but are impractical or difficult to realize, due to land availability and zoning issues. A category with a significant surplus is beer wine and liquor stores, but this may not fit other community objectives. Areas that show net surpluses and are potentially feasible include clothing, furniture and electronics.

The RMP summary for the 92102 area by major category is shown in Table 6 below, which shows a collapsed assessment of opportunity gap. The top five positive gap areas are, in order, clothing and clothing accessories (\$20,340,102), limited service eating places (\$10,124,452), full service restaurants (\$9,957,586), electronics/appliance stores (\$8,366,159) and furniture/home furnishings (\$5,863,637).

Table 6: Retail Market Potential Summary Analysis Combined 92102 Area

Retail Stores	2015 Demand (Consumer Expenditures)	2015 Supply (Retail Sales)	Opportunity (Gal/Surplus)
Foodservice & Drinking Places - 722	\$53,277,207	\$49,475,971	\$3,801,236
Full-Service Restaurants-7221	26,913,434	16,955,848	9,957,586
Limited-Service Eating Places-7222	24,120,640	13,996,188	10,124,452
Special Foodservices-7223	6,598,422	19,807,555	(13,209,133)
Drinking Places -Alcoholic Beverages- 7224	2,207,813	4,231,732	(2,023,919)
GAFO	128,813,912	217,920,644	(89,106,732)
General Merchandise Stores-452	67,526,147	201,128,086	(133,601,939)
Clothing & Clothing Accessories Stores- 448	25,531,007	5,190,905	20,340,102
Furniture & Home Furnishings Stores- 442	9,524,526	3,660,889	5,863,637
Electronics & Appliances Stores-443	9,936,936	1,570,777	8,366,159
Sporting Goods, Hobby, Book, Music Stores-451	9,921,206	5,397,390	4,523,816
Office Supplies, Stationery, Gift Stores- 4532	6,374,090	972,597	5,401,493

Summary of Findings and Recommendations

The ultimate goal of this project was to help determine business growth opportunities within the GLH area that could strengthen the community by providing additional services and business options. The data presented suggests areas where businesses in GLH have the ability to achieve growth and future success based on demographics and market potential. The market study shows that the GLH area is made up of 15,047 households, with a total population of 45,554 persons, with a median age of 31 years. Roughly 70% of the population is Hispanic and 80% of the households are rentals. Roughly six in ten are employed in blue collar jobs and roughly the same proportion of adults has a high school education or less formal schooling. The average household earns \$46,483 and has 1.6 vehicles. The total addressable market in GLH (average retail demand) is estimated to be over \$310 million. We estimate that there are currently 546 businesses in the GLH area.

Before venturing into any of the business opportunities suggested by this study, a deeper assessment of the neighborhood needs would need to be conducted. Table 5 shows that there are specific areas that can be defined with high customer purchase potential. These include items that members of the GLH community purchase on a regular basis, in addition to demand for more specialty goods or services. Future business owners can further break down these areas of high customer demand by more specific needs.

To provide an illustration, future business owners can use the data in Table 5 to specifically identify potential opportunities within the market by analyzing the demographic and market information. Examples include:

- **Car Repair and Auto Detailing:** There are over 24,000 cars and trucks owned by residents of the GLH area. There are 1.6 vehicles owned per household. There are over 130,000 vehicles owned by residents living within five miles (this additional data from File 2).
- **Locksmith and Home Repair:** Over 80% of homes in the GLH area, totaling more than 12,000, are rentals. Property owners and managers will need the assistance of locksmiths to change locks and service providers (for example, plumbing, window repair, painting, and carpet cleaning) to make repairs or service properties before renting. Within five miles, there are nearly 61,000 rental properties (this additional data from File 2).

- **Hair Stylist or Salon:** Nearly 40% of the GLH population is female, age 15 or older.
- **Women's Clothing:** GLH households spend \$133 per year at women's clothing stores, over \$2 million annually. There is a positive opportunity gap in the 92102 area.
- **Drinking Places:** GLH households spend \$81.94 per year at drinking places. Two thirds of the adult population is single and can use drinking locations as places to meet future spouses, make friends and engage in social interaction. There is a positive opportunity gap in the 92102 area.
- **Child Care Providers:** Over 20% of the GLH's population is under the age of 15 with 8% being under school age
- **Hobby, Toy and Game Sellers:** Over 20% of the population is under 15 and 16% of the population is between the key gaming age of 15 – 25.

The market assessment provides LISC San Diego with an assessment of business opportunity in the Greater Logan Heights community. Providing this information to the community is not enough to spark business growth. During the team's visit to the community and through interviews with business owners, it became evident that the business community needs a strong network of communication. Multiple business owners emphasized that developing relationships with churches and schools that would allow LISC and similar organizations to communicate neighborhood activities. Interactions with business owners within the community also highlighted the need for additional training. Many business owners were unclear as to the laws, regulations and best business practices, ultimately negatively affecting their business growth. To make a significant culture change in this community entrepreneur training should start as young as those in middle school and continue into adulthood. Classes within the school curriculum can be used to train students to look at opportunities within the community to continue to support the idea of a healthy, happy, and safe community for all members of Greater Logan Heights. This type of culture shift and training may require a sustainable three to five year (or longer) plan, with the support of forward thinking organizations such as LISC San Diego, to radically change a community such as Greater Logan Heights.

Appendix A

Business Survey Results

Interview One

1. Company

Rock Your Look Salon

2. Name of Individual

Tania Banuelos

3. Who is the owner(s)? May we have their contact information (phone/email)

Tania Banuelos' daughter owns the businesses

4. How long have you been in business?

Since November 2014

5. How many employees do you currently have?

3

6. Do you current have customers that live within the Greater Logan Heights area?

Yes, started attaining GLH customers 2 months ago

7. As an estimate, what percentage of your business comes from within the neighborhood and what percentage of your business comes from outside the Greater Logan Heights area?

10% comes from GLH, 90% from outside (Point Loma, Clairemont, Pacific Beach – stylists bring clients over from previous neighborhoods)

8. What percentage of your current customers are repeat customers? Or is most of your business involve getting new customers?

Very little/too early to tell: Women return to the salon every 2 months for styling while men return 1 or 2 times a week for a regular haircut

9. What does your company do to attract new business key sales and marketing, word of mouth, etc.)? What works well? What has not worked?

Facebook posts to friends and families: Share button. Word of mouth, referrals has worked really well. Instagram account, Facebook sharing posts and page, YELP asking customer to leave review before they exit salon. The salon has looked into church bulletins but too expensive- \$2000 a year, \$600 first payment and \$96 a month. Utilizes flyers at WALMART and DOLLAR TREE because high traffic areas and goes to local events: mentioned Police Station event (every 6 months). Also emphasis on the word "free" attracts a lot of new customers. Such as "free treatment". @rockyourlooksalon

10. Do you utilize any of the following types of marketing? Yellow pages, newspaper advertising, social media, Google Adwords, local churches & schools, neighborhood flyers, billboards, and/or branding on vehicles?

Social media and neighborhood flyers

11. Do you feel that online marketing would or does benefit your business?

Yes, on a scale of 1-10: 8

12. Do you see your business experiencing growth in the next 6 months?

Yes: more customer growth; One customer per day is slow (usually Mondays). We'd like to increase to three a day. Six customers in one day is "busy" and is what is needed to "pay the bills".

13. Do you have 3-6 month goals you would like to attaining for your business?

Change the signage from cursive to bold letters, add lights to signage outside, get employee uniforms in creating logo/brand for more word of mouth marketing

14. As you reflect on your business what do you think you are areas for improvement?

Storefront remodel, give more light for customers who leave late (close at 6pm but sometimes customers stay until 7-9pm), wants to put utilize sidewalk signage but is unsure if it is legal or if she could be fined

15. What do you feel are some of your challenges of conducting business in Greater Logan Heights? What area of San Diego o you see potential for your business?

Clients' perception. Because the salon looks really new, clean and nice, people from GLH are afraid to ask for prices because they think it is too expensive.

16. What do you see as opportunities within the GLH market area?

Yes. Sees opportunity as the ballpark and downtown is connected to it. Sees Logan Heights as a "mini North Park".

17. Observations from interviewer

Very clean, chic, new flooring, urban feel, relaxed atmosphere, carries brand named product on shelves

Interview Two

1. Company

a. Villa Auto Repair Electric

2. Name of Individual

a. Ismael Villa

3. Who is the owner(s)? May we have their contact information (phone/email)

a. Ismael is the owner but mentioned he has partners

4. How long have you been in business?

a. 6 years

5. How many employees do you currently have?

a. None, cannot afford to pay for employees at this time

6. Do you current have customers that live within the Greater Logan Heights area?

a. Yes

7. As an estimate, what percentage of your business comes from within the neighborhood and what percentage of your business comes from outside the Greater Logan Heights area?

a. n/a; does not know because he has not asked

8. What percentage of your current customers are repeat customers? Or is most of your business involve getting new customers?

a. Majority are repeat. He is the mechanic only focused on servicing cars.

9. What does your company do to attract new business key sales and marketing, word of mouth, etc.)? What works well? What has not worked?

a. Word of mouth/ referrals

10. Do you utilize any of the following types of marketing? Yellow pages, newspaper advertising, social media, Google Adwords, local churches & schools, neighborhood flyers, billboards, and/or branding on vehicles?

a. No; they are too expensive

11. Do you feel that online marketing would or does benefit your business?

- a. *Yes, but (I) would need to employ someone to do that for him and (I) am not in a position to hire an employee*
12. Do you see your business experiencing growth in the next 6 months?
- a. *Predicts business staying same/steady, perhaps even lower*
13. Do you have 3-6 month goals you would like to attaining for your business?
- a. *None at the moment*
14. As you reflect on your business what do you think you are areas for improvement?
- a. *No plans (for improvement) but would like to employ 1-2 people to help him. (He does all the work himself, with a line of 4 cars waiting for his service.)*
15. What do you feel are some of your challenges of conducting business in Greater Logan Heights? What area of San Diego o you see potential for your business?
- a. *Some people (customers) do not want to pay for the service. Some do leave without paying by making up stories/excuses for not paying. To avoid trouble, the I tell them to go and takes the loss.*
16. What do you see as opportunities within the GLH market area?
- a. *There is a perception in the community among mechanics that the City of San Diego no longer wants their small shops. Mechanics feel as though the city is “cleaning up” and pushing them out.*
17. Observations from interviewer
- a. *Open lot, unclean, parked cars lined up for servicing, car lift under roofing to the right when walking in. Office area is small and dirty. Signage was clear and visible upon entering lot.*

Interview Three

1. Company
 - a. *Cesar's Auto Electric*
2. Name of Individual
 - a. *Cesar Rodriguez*
3. Who is the owner(s)? May we have their contact information (phone/email)
 - a. *Yes, he works in shared lot with other mechanics*
4. How long have you been in business?
 - a. *Since 1991 (24 years)*
5. How many employees do you currently have?
 - a. *Had 2 but could not keep them because of insurance and workers compensation cost*
6. Do you current have customers that live within the Greater Logan Heights area?
 - a. *Yes*
7. As an estimate, what percentage of your business comes from within the neighborhood and what percentage of your business comes from outside the Greater Logan Heights area?
 - a. *n/a; no exact percentage but knows he has clients from Linda Vista, Clairemont, El Cajon*
8. What percentage of your current customers are repeat customers? Or is most of your business involve getting new customers?
 - a. *Majority are repeat, about 50% (they trust him)*
9. What does your company do to attract new business key sales and marketing, word of mouth, etc.)? What works well? What has not worked?
 - a. *Most of the new business comes from referrals.*
10. Do you utilize any of the following types of marketing? Yellow pages, newspaper advertising, social media, Google Adwords, local churches & schools, neighborhood flyers, billboards, and/or branding on vehicles?
 - a. *He has his business listed on Google and noted that YP lists his business for free. He also mentioned the BAME association that he represented his business and handed out flyers. No social media*

11. Do you feel that online marketing would or does benefit your business?
- a. *It could...probably 10% better*
12. Do you see your business experiencing growth in the next 6 months?
- a. *He works alone so no. If anything he would move from the area for growth in terms of revenue.*
13. Do you have 3-6 month goals you would like to attaining for your business?
- a. *None at the moment*
14. As you reflect on your business what do you think you are areas for improvement?
- a. *Areas for improvement is the community itself*
15. What do you feel are some of your challenges of conducting business in Greater Logan Heights? What area of San Diego o you see potential for your business?
- a. *Clients are tough and sometimes hard to work with. He views other locations, such as La Jolla and Clairemont, better suitable for him. He wants to be able to work less hours with the same revenue.*
16. What do you see as opportunities within the GLH market area?
- a. *Not much for business. The area is great now for real estate/builders.*
17. Observations from interviewer
- a. *Open lot with a shack waiting room, old and rusted roofing cover. Cars parked lined up with one another. Longer lot, with another mechanic working on another car near the center. Mr. Rodriguez works on the left hand side entering. Signage was clear and on the entrance to the lot*

Interview Four

1. Company
 - a. *Las Morelianas*
2. *Name of Individual*
 - a. *Dario Villagomez*
3. *Who is the owner(s)? May we have their contact information (phone/email)*
 - a. *He is the owner, best to call or visit in person (if off on Mondays, available around 11am)*
4. *How long have you been in business?*
 - a. *17 years (used to be at the farmers market where Walmart is now)*
5. *How many employees do you currently have?*
 - a. *6 employees*
6. *Do you current have customers that live within the Greater Logan Heights area?*
 - a. *Yes*
7. *As an estimate, what percentage of your business comes from within the neighborhood and what percentage of your business comes from outside the Greater Logan Heights area?*
 - a. *Est. 50% from GLH and 50% from San Marcos, Escondido, La Jolla, Chula Vista, San Ysidro, El Cajon, University City, Downtown San Diego*
8. *What percentage of your current customers are repeat customers? Or is most of your business involve getting new customers?*
 - a. *n/a*
9. *What does your company do to attract new business key sales and marketing, word of mouth, etc.)? What works well? What has not worked?*
 - a. *They have their own website <http://www.lasmorelianas.com> and uses internet coupons (\$10 off when \$20 spent) on restaurants.com.*
10. *Do you utilize any of the following types of marketing? Yellow pages, newspaper advertising, social media, Google Adwords, local churches & schools, neighborhood flyers, billboards, and/or branding on vehicles?*
 - a. *Social media: His wife posts on Facebook but does not have a dedicated Facebook page.*

11. Do you feel that online marketing would or does benefit your business?

a. Yes

12. Do you see your business experiencing growth in the next 6 months?

a. Is planning to remodel in May, new roofing. He plans to focus on the restaurant (used to be in farmers markets and distribute chicharones to TJ)

13. Do you have 3-6 month goals you would like to attaining for your business?

a. Only to have more clients and possibly open another location in Chula Vista because a lot of his customers are from CV.

14. As you reflect on your business what do you think you are areas for improvement?

a. Business is good but needs an assistant manager to help him. Looking to hire someone who knows how to run a business within next 3 months.

15. What do you feel are some of your challenges of conducting business in Greater Logan Heights? What area of San Diego o you see potential for your business?

a. Some clients tag [spray paint] bathrooms...

16. What do you see as opportunities within the GLH market area?

a. Yes, Imperial Ave is a busy street.

17. Observations from interviewer

a. Shack look on the outside, a home next door. Customer can see into the kitchen. Looks bigger inside, clean floors, clean tables. Clear signage.

Interview Five

1. Company
 - a. *Cachanilla's Auto Service*
2. *Name of Individual*
 - a. *Ricardo Estrada*
3. *Who is the owner(s)? May we have their contact information (phone/email)*
 - a. *Ruben (dad) and Ricardo own business*
4. *How long have you been in business?*
 - a. *25 years*
5. *How many employees do you currently have?*
 - a. *Just him and his dad*
6. *Do you current have customers that live within the Greater Logan Heights area?*
 - a. *Yes*
7. *As an estimate, what percentage of your business comes from within the neighborhood and what percentage of your business comes from outside the Greater Logan Heights area?*
 - a. *City Heights, Chula Vista, Escondido. 20% from GLH and 80% from outside (clients moved away)*
8. *What percentage of your current customers are repeat customers? Or is most of your business involve getting new customers?*
 - a. *Almost (100%) all are repeat customers since they are well known (25 years)- a lot of family referrals and now sons of the fathers who used to come*
9. *What does your company do to attract new business key sales and marketing, word of mouth, etc.)? What works well? What has not worked?*
 - a. *Word of mouth/ referrals- is not looking for more business because he is comfortable with the work load*
10. *Do you utilize any of the following types of marketing? Yellow pages, newspaper advertising, social media, Google Adwords, local churches & schools, neighborhood flyers, billboards, and/or branding on vehicles?*
 - a. *No*

11. Do you feel that online marketing would or does benefit your business?
- a. No- they have been around for so long that people already know of them*
12. Do you see your business experiencing growth in the next 6 months?
- a. None at the moment- business has been slowing down*
13. Do you have 3-6 month goals you would like to attaining for your business?
- a. None at the moment- business has been slowing down*
14. As you reflect on your business what do you think you are areas for improvement?
- a. Recently bought a credit card reader to accept card payments. Other than that keeping customer service and satisfaction up to retain current clients*
15. What do you feel are some of your challenges of conducting business in Greater Logan Heights? What area of San Diego o you see potential for your business?
- a. City (of San Diego) is making it harder to do business such as inspector fees, fire marshal fees (\$600), etc. Looking to move business because Downtown is moving East and is loosing clients.*
16. What do you see as opportunities within the GLH market area?
- a. No. Is looking to move. Feels like is being kicked out.*
17. Observations from interviewer
- a. Solid cement for meeting area and office space. The car lift itself looks old, the garage is filled with unused materials and lifting machines. Unclean.*

Interview Six

1. Company
 - a. *Kar Auto Sound*
2. *Name of Individual*
 - a. *Huan Enciso*
3. *Who is the owner(s)? May we have their contact information (phone/email)*
 - a. *Huan now watches over the business. His daughter owns the business but she is currently enrolled in school. She works in the shop from time to time. Huan is the best contact, call or in person.*
4. *How long have you been in business?*
 - a. *23 years*
5. *How many employees do you currently have?*
 - a. *One helper- on contract, not employee.*
6. *Do you current have customers that live within the Greater Logan Heights area?*
 - a. *Yes. Used to have more.*
7. *As an estimate, what percentage of your business comes from within the neighborhood and what percentage of your business comes from outside the Greater Logan Heights area?*
 - a. *GLH "[Has] declined 80%"*
8. *What percentage of your current customers are repeat customers? Or is most of your business involve getting new customers?*
 - a. *No specific number given. Some walk-ins.*
9. *What does your company do to attract new business key sales and marketing, word of mouth, etc.)? What works well? What has not worked?*
 - a. *Has business listed on Google and Yelp. Word of Mouth works best.*
10. *Do you utilize any of the following types of marketing? Yellow pages, newspaper advertising, social media, Google Adwords, local churches & schools, neighborhood flyers, billboards, and/or branding on vehicles?*
 - a. *Google and Yelp.*
11. *Do you feel that online marketing would or does benefit your business?*
 - a. *Yes it has for leads but cannot track.*

12. Do you see your business experiencing growth in the next 6 months?

- a. *Is not looking to grow. Is comfortable with the volume currently getting even though decreasing 20%.*

13. Do you have 3-6 month goals you would like to attaining for your business?

- a. *Sell/Liquidate and move to Mexico or buy a small franchise in Mexico or San Diego like a 711. (He is a sales man, entrepreneur).*

14. As you reflect on your business what do you think you are areas for improvement?

- a. *If we were to continue would improve by moving to new location in North County.*

15. What do you feel are some of your challenges of conducting business in Greater Logan Heights? What area of San Diego o you see potential for your business?

- a. *There is much less traffic in the area now. There used to be much more 20 years ago. Sees opportunity in Spring Valley, Lemon Grove, City Heights, Chula Vista, Linda Vista, and North County.*

16. What do you see as opportunities within the GLH market area?

- a. *No.*

17. Observations from interviewer

- a. *Clean space with product displayed on the wall. Able to sit on stool near counter and area was well kept. Further back are the cars in an outside garage waiting to get installation services.*

Interview Seven

1. Company
 - a. *J&C Auto Service*
2. *Name of Individual*
 - a. *Juan Estrada (JC)*
3. *Who is the owner(s)? May we have their contact information (phone/email)*
 - a. *Juan is the owner and best way to contact is in person.*
4. *How long have you been in business?*
 - a. *20 years*
5. *How many employees do you currently have?*
 - a. *His son is his partner. No employees.*
6. *Do you current have customers that live within the Greater Logan Heights area?*
 - a. *Yes.*
7. *As an estimate, what percentage of your business comes from within the neighborhood and what percentage of your business comes from outside the Greater Logan Heights area?*
 - a. *70% from outside- Escondido, San Ysidro, Encanto, Spring Valley, South Bay | 30% GLH*
8. *What percentage of your current customers are repeat customers? Or is most of your business involve getting new customers?*
 - a. *Mostly repeat and regular customers since they know him and trust him as their mechanic.*
9. *What does your company do to attract new business key sales and marketing, word of mouth, etc.)? What works well? What has not worked?*
 - a. *Referrals/ word of mouth. Gets customer by maintaining strong customer service with honesty and integrity.*
10. *Do you utilize any of the following types of marketing? Yellow pages, newspaper advertising, social media, Google Adwords, local churches & schools, neighborhood flyers, billboards, and/or branding on vehicles?*
 - a. *Passed out flyers in the CVBA.*
11. *Do you feel that online marketing would or does benefit your business?*

- a. *Business is listed on Google but does not think online marketing will benefit.*
- 12. *Do you see your business experiencing growth in the next 6 months?*
 - a. *He is focusing on the quality/service of his clients rather than quantity. Business has slowed down.*
- 13. *Do you have 3-6 month goals you would like to attaining for your business?*
 - a. *Growth is hard because of government pressure (inspectors).*
- 14. *As you reflect on your business what do you think you are areas for improvement?*
 - a. *Get better clients.*
- 15. *What do you feel are some of your challenges of conducting business in Greater Logan Heights? What area of San Diego o you see potential for your business?*
 - a. *Noted how expensive fire inspections are now, used to be free now are \$650.*
- 16. *What do you see as opportunities within the GLH market area?*
 - a. *He plans to stay “better for me to stay” and is able to have his voice heard when he speaks out to associations, etc.*
- 17. *Observations from interviewer*
 - a. *Small lot, few cars parked there. Has roofing where three cars can park. Machines are all out on the countertop with tools. Unclean. His office is a small walk in, has toolshed with reference books for auto parts etc.*

Interview Eight

1. Company
 - a. *King Optical*
2. *Name of Individual*
 - a. *Ruben Escalante*
3. *Who is the owner(s)? May we have their contact information (phone/email)*
 - a. *Ruben owns the business with his wife Aurelia. He is there all the time, best form of contact is by phone or in shop after 11:30am.*
4. *How long have you been in business?*
 - a. *2 years*
5. *How many employees do you currently have?*
 - a. *No employees.*
6. *Do you current have customers that live within the Greater Logan Heights area?*
 - a. *Yes.*
7. *As an estimate, what percentage of your business comes from within the neighborhood and what percentage of your business comes from outside the Greater Logan Heights area?*
 - a. *85% GLH | 15% from Coronado, Temecula, North Park, El Cajon*
8. *What percentage of your current customers are repeat customers? Or is most of your business involve getting new customers?*
 - a. *Repeat customers 90%*
9. *What does your company do to attract new business key sales and marketing, word of mouth, etc.)? What works well? What has not worked?*
 - a. *Has website and has gotten calls. [note; A lot of people are surprised he is there and faces no direct competition in the area.]*
10. *Do you utilize any of the following types of marketing? Yellow pages, newspaper advertising, social media, Google Adwords, local churches & schools, neighborhood flyers, billboards, and/or branding on vehicles?*
 - a. *Is on Yellow Pages. Has a website: <http://kingopticalsd.com/home/2893050> (with email and phone number clearly shown on header). Has twitter: <https://twitter.com/KingOptical01> (2 tweets only) and a FB page: <https://www.facebook.com/pages/King-Optical/828658710514701>*

- b. Hands out flyers at Spring Valley Swap meet and sets appointments, has put in ad in local Church (\$50) (mentioned it was hard to measure ROI)*
- 11. Do you feel that online marketing would or does benefit your business?*
 - a. Yes*
- 12. Do you see your business experiencing growth in the next 6 months?*
 - a. Growing slowly, wants to make new customers repeat business.*
- 13. Do you have 3-6 month goals you would like to attaining for your business?*
 - a. Better marketing: flyers, talking to more people, ads online and in person, looking to get half a page ad on newspaper*
- 14. As you reflect on your business what do you think you are areas for improvement?*
 - a. Marketing/promotion. Also looking to redo storefront and signage/ paint and change the text/logo*
- 15. What do you feel are some of your challenges of conducting business in Greater Logan Heights? What area of San Diego o you see potential for your business?*
 - a. People don't have a lot of money or have medical insurance. Low income area.*
- 16. What do you see as opportunities within the GLH market area?*
 - a. National avenue is a busy street with a lot of foot traffic and says is nicer than Ocean View or Imperial*
- 17. Observations from interviewer*
 - a. Clean space, clean tile, roomy inside but no chairs for customers to sit/wait. Nice array of glasses to display and has a fish tank that attracts children walking by. Outside has a sign on top of the window and one sticking out for people driving by. Also has a sign on the sidewalk.*

Interview Nine

1. Company
 - a. *Albritten Tax Service*
2. Name of Individual
 - a. *Jesse Albritten*
3. Who is the owner(s)? May we have their contact information (phone/email)
 - a. *Jesse Albritten is the sole owner and employee.*
4. How long have you been in business?
 - a. *38 years.*
5. How many employees do you currently have?
 - a. *Mr. Albritten is the sole owner and employee.*
6. Do you current have customers that live within the Greater Logan Heights area?
 - a. *Yes.*
7. As an estimate, what percentage of your business comes from within the neighborhood and what percentage of your business comes from outside the Greater Logan Heights area?
 - a. *Not Known – Less than before.*
8. What percentage of your current customers are repeat customers? Or is most of your business involve getting new customers?
 - a. *Unknown – He does not keep track of this information.*
9. What does your company do to attract new business key sales and marketing, word of mouth, etc.)? What works well? What has not worked?
 - a. *Nothing—as a home office and business, Mr. Albritten is less concerned with getting new business than he was during his pre-retirement years.*

10. Do you utilize any of the following types of marketing? YellowPages, newspaper advertising, social media, Google AdWords, local churches & schools, neighborhood flyers, billboards, and/or branding on vehicles?

a. No. Everything is word-of-mouth.

11. Do you feel that online marketing would or does benefit your business?

a. No, I don't think that works for my business.

12. Do you see your business experiencing growth in the next 6 months?

a. Maybe. Because of the Affordable Care Act, I can foresee people and business having questions about how to be in compliance, but other than that, no, I don't think my business will materially grow.

13. Do you have 3-6 month goals you would like to attaining for your business?

a. Not really. I would like to find a way to wind down my business or maybe sell out. Succession is a big concern for me and my kids don't want to work in tax.

14. As you reflect on your business what do you think are areas for improvement?

a. I don't believe there are many areas for improvement. My business has not changed much and the only updates that I need to make are periodical—or for example, when laws change. Other than that, we are just fine.

15. What do you feel are some of your challenges of conducting business in Greater Logan Heights? What area of San Diego do you see potential for your business?

a. There are so many challenges. The first would be language barriers, as the only black businesses owner in BAME, there is not much opportunity for us to network and collaborate. It is also very dark and dangerous in this neighborhood. You will not find me walking around after sunset

16. What do you see as opportunities within the GLH market area?

a. Yes, but I don't think anything will work until the community decides they need to come together and interact with each other. I

used to know all the business owners in the area, but now I cant talk to them because we don't even speak the same language. There should be some way for us all to be able to connect without issue.

17. Observations from interviewer

- a. Mr. Albritten works out of his home. Though the property is definitely a house, the entire front entrance and first room of the house have been outfitted to look like an office.*

Interview Ten

1. Company
 - a. *The Lab Barber Shop*
2. Name of Individual
 - a. *Manny*
3. Who is the owner(s)? May we have their contact information (phone/email)
 - a. *Manny is the sole owner and employee.*
4. How long have you been in business?
 - a. *As of April 2015, Manny has been in business at his current location in GLH for 6 months.*
5. How many employees do you currently have?
 - a. *Manny is the sole owner and employee. He is also the only barber that occupies the space.*
6. Do you current have customers that live within the Greater Logan Heights area?
 - a. *Yes.*
7. As an estimate, what percentage of your business comes from within the neighborhood and what percentage of your business comes from outside the Greater Logan Heights area?
 - a. *Local: 10% - Non Local: 90% - As a certified and licensed barber, Manny relies on his former clients who follow him from location-to-location.*
8. What percentage of your current customers are repeat customers? Or is most of your business involve getting new customers?
 - a. *90% - The nature of his trade allows Manny to work virtually anywhere. With only 6 months at his current location, he relies principally on repeat customers.*
9. What does your company do to attract new business key sales and marketing, word of mouth, etc.)? What works well? What has not worked?

- a. As the sole employee/owner of the business, Manny has not been able to focus on getting new business. As of April 2015, he has been relying principally on repeat customers for business. He has recently signed up for Instagram and Facebook. He also has a presence on Yelp! but has not subscribed to any premium services on these social networks.*
10. Do you utilize any of the following types of marketing? YellowPages, newspaper advertising, social media, Google AdWords, local churches & schools, neighborhood flyers, billboards, and/or branding on vehicles?
- a. Yes. Most of The Lab's marketing is through online social media. Instagram is the most popular medium for barbers but, at present, (April 2015) Manny has not been able to effectively monetize his following on this outlet. The Lab has not gone into any print mediums since opening.*
11. Do you feel that online marketing would or does benefit your business?
- a. Yes.*
12. Do you see your business experiencing growth in the next 6 months?
- a. Yes.*
13. Do you have 3-6 month goals you would like to attaining for your business?
- a. Yes. Manny believes that online social media is the next priority and though the interior still needs some work, he believes OSM will bring more business.*
14. As you reflect on your business what do you think are areas for improvement?
- a. Manny would like to see his online presence grow during the next three to six months. He would also like to see the interior of his building completely remodeled.*
15. What do you feel are some of your challenges of conducting business in Greater Logan Heights? What area of San Diego do you see potential for your business?
- a. Manny believes that because the area is dangerous, people stop coming after a certain time of day. He argues that lighting and street conditions are detrimental to business*
16. What do you see as opportunities within the GLH market area?

- a. *Manny believes there are opportunities everywhere, but he doesn't think the people in the community have a desire to work together in this community. There is a lot of division between groups in the community which results in a lot of tension.*

17. Observations from interviewer

- a. *The Lab Barbershop is located in a nondescript building with a graffiti-style logo in the front. The inside of the barbershop is arranged to support up to 4 barbers at a time. While the paint looks fresh, it appears to have been lain over bare concrete and in some areas of the building rebar is exposed.*

Interview Eleven

1. Company
 - a. *3-in-1 Design*
2. Name of Individual
 - a. *Bill Boone*
3. Who is the owner(s)? May we have their contact information (phone/email)
 - a. *Bill Boone owns the firm outright.*
4. How long have you been in business?
 - a. *Over 6 years (as of April 2015)*
5. How many employees do you currently have?
 - a. *Mr. Boone employs "two-and-a-half" employees.*
6. Do you current have customers that live within the Greater Logan Heights area?
 - a. *Yes.*
7. As an estimate, what percentage of your business comes from within the neighborhood and what percentage of your business comes from outside the Greater Logan Heights area?
 - a. *Local: 18% - Non Local: 72%*
8. What percentage of your current customers are repeat customers? Or is most of your business involve getting new customers?
 - a. *65%*
9. What does your company do to attract new business key sales and marketing, word of mouth, etc.)? What works well? What has not worked?
 - a. *Mr. Boone does not actively engage in any coordinated efforts to attract new business. As a veteran-owned business, word-of-mouth referrals among the strong local military community work extremely well.*
10. Do you utilize any of the following types of marketing? YellowPages,

newspaper advertising, social media, Google AdWords, local churches & schools, neighborhood flyers, billboards, and/or branding on vehicles?

- a. *Facebook and Yelp help drive referrals, but Mr. Boone admits that he has no approach to a marketing strategy for his business.*

11. Do you feel that online marketing would or does benefit your business?

- a. *Unsure*

12. Do you see your business experiencing growth in the next 6 months?

- a. *Yes.*

13. Do you have 3-6 month goals you would like to attaining for your business?

- a. *Mr. Boone would like to reevaluate his present (nonexistent) strategy to online social media. He is also planning on making significant capital expenditures for his business to include new equipment for sophisticated printing and screening.*

14. As you reflect on your business what do you think are areas for improvement?

- a. *Mr. Boone has identified three areas for improvement—they include developing his online and social media presence; acquire licensing for store signage on the building; and finish “settling in” to include unpacking boxes and arranging the office.*

15. What do you feel are some of your challenges of conducting business in Greater Logan Heights? What area of San Diego do you see potential for your business?

- a. *Mr. Boone believes the biggest challenge to his business is working with the City. Mr. Boone has found it too difficult and costly to get the proper signage for his building as well as doing “simple” things for his business—like painting the interior of his office. Mr. Boone also argues that poor parking and safety concerns are a detriment to the reputation of his neighborhood. Some clients are less likely to drive to the area to conduct business.*

16. What do you see as opportunities within the GLH market area?

- a. *Yes. Mr. Boone believes that there are many opportunities for the area, but believes that support must come from outside GLH. However, he cites problems with basic infrastructure as significant*

obstacles to opportunity.

17. Observations from interviewer

- a. The building is in a great location, but the signage was unclear and judging from the exterior of the building, it was difficult to tell what type of work was done there. The inside of their office served as their sales and design workspace, their warehouse, workspace, showroom and manufacturing area.*

Interview Twelve

1. Company

a. Antojitos Colombianos

2. Name of Individual

a. Javier Rodriguez ("Mr. Rodriguez")

3. Who is the owner(s)? May we have their contact information (phone/email)

a. Mr. Rodriguez owns the company.

4. How long have you been in business?

a. Just over 3 years (As of April 2015)

5. How many employees do you currently have?

a. Mr. Rodriguez works the restaurant with three other family members.

6. Do you current have customers that live within the Greater Logan Heights area?

a. Yes.

7. As an estimate, what percentage of your business comes from within the neighborhood and what percentage of your business comes from outside the Greater Logan Heights area?

a. Local: 60% - Non Local: 40%

8. What percentage of your current customers are repeat customers? Or is most of your business involve getting new customers?

a. 50%

9. What does your company do to attract new business key sales and marketing, word of mouth, etc.)? What works well? What has not worked?

a. Mr. Rodriguez does not actively engage in any material efforts to attract new business. Mr. Rodriguez makes the point that most of his first-time customers are word-of-mouth referrals and personal referrals work best for his business. Mr. Rodriguez has also tried print advertising, but has found the conversion to be less cost-effective.

10. Do you utilize any of the following types of marketing? Yellow pages, newspaper advertising, social media, Google AdWords, local churches & schools, neighborhood flyers, billboards, and/or branding on vehicles?

- a. The restaurant is on Facebook and Yelp! They are currently running a full-page advert in a San Diego magazine entitled “Vida Latina” (May 2015)

11. Do you feel that online marketing would or does benefit your business?

- a. Yes.

12. Do you see your business experiencing growth in the next 6 months?

- a. Yes.

13. Do you have 3-6 month goals you would like to attaining for your business?

- a. *Mr. Rodriguez discussed his plans to add a sidewalk dining option to customers. He is also looking to rearrange the interior of his business to reflect a café-style restaurant.*

14. As you reflect on your business what do you think you are areas for improvement?

- a. *Mr. Rodriguez felt that he could learn more about how and where to get the right permits and licenses to operate in full compliance. He expressed an interest learning about best practices in his industry for sanitation and customer services.*

15. What do you feel are some of your challenges of conducting business in Greater Logan Heights? What area of San Diego do you see potential for your business?

- a. *Mr. Rodriguez identified safety as the key theme among his challenges. Poor street lighting discourages business in the evenings. He believes this further encourages people to steal things that are left outside overnight and gives as a cover for people who want to graffiti.*

16. What do you see as opportunities within the GLH market area?

- a. *Yes. The owner is optimistic about the local economy.*

17. Observations from interviewer

- a. *The restaurant had a bodega-style layout with a variety of*

prepackaged foods and dry snacks arranged sparsely on shelves. Menu items include typical Colombian snacks, sandwiches, drinks and desserts.

Encanto/Diamond District



Executive Director, Liliana Garcia-Rivera

Vice President, Richard Seges







OUCHI COURTYARD

MIXED USE 5,000 S.F. COMMERCIAL AND FAMILY APARTMENTS
SAN DIEGO CALIFORNIA



IMPERIAL AVENUE (NORTH ELEVATION)



New Spaces

A district of opportunities

Diamond Business Improvement District

A district like no other!

Located in the heart of vibrant Southeastern San Diego, Diamond Business Association fosters local economic prosperity by advocating for and promoting the growth of businesses in the area. Since its humble beginnings, the Diamond BID has successfully increased local partnerships, strengthening the resources for our local members. From retention to attraction, The Diamond BID's has focused on promoting existing businesses while inviting new ones to our district. Programs range from Access to Capital for Small Businesses to Storefront Improvement Access to Industry Specific Mixers and more. Community engagement is also part of the strategy. Our main events, Diamond Street Festival and Taste of the Diamond brought roughly 9,000 people to our district, this year alone, to try the food, services, and products we have to offer in this district. No matter what you are looking for, you will find it in our vibrant, and diverse Business District!

COMING SOON

DIAMOND COWORK

Ribbon Cutting Ceremony and
Grand Tour
November 30th, 2017
5003 Imperial Avenue
San Diego, CA 92113



HOLIDAY BRIDGE

LIGHTING CELEBRATION

Snow, hot chocolate, family and of course, Santa Claus!
Saturday, December 2nd, 2017
4:00-6:30 pm FREE
Corner of Market and Toney St.
San Diego, CA 92113

#SHOPDIAMOND

#DINEDIAMOND

Liliana Garcia Rivera
Executive Director
(619) 255-3604
liliana@sdbd.org

RETAIL ANALYSIS OF COUNCIL DISTRICT 4



> \$1 BILLION
OF RETAIL OPPORTUNITY
IN DISTRICT 4

RETAIL ANALYSIS

San Diego City Council District 4 presents an immense opportunity for profit-minded retailers and investors. Research shows that residents of District 4 have significant aggregate purchasing power, but they make majority of their purchases outside of District 4, indicating a clear opportunity for investment within the district to fill the gaps.

According to data from the Nielsen Group, District 4 residents spent more than \$1.9 billion on retail purchases in 2014. All sales made within the district, however, totaled only \$889.6 million in the same year. This represents an unmet demand of more than a billion dollars—an apparent opportunity for investors.

When restricting the boundaries of analysis to such a relatively small geography, we naturally accept that residents inside of District 4 will have to make some retail purchases outside of district boundaries. Likewise, we expect that some amount of visitors from outside districts and cities will make purchases in the district, as District 4 is home to the second most used intermodal station (at Euclid and Market) in the entire MTS system—second only to the international border crossing.

However, the magnitude of unmet demand is beyond this natural expectation. The total dollar value of purchases made within District 4 (by residents of any district or city) was less than half of the total spent by District 4 residents (in or out of District 4).

Further, this excess demand from district residents is constant across the spectrum of retail merchandise lines. A sample of lines representing the highest unmet demand within the district includes:

- Groceries: \$161.3 million
- Restaurants: \$104.1 million
- Drugs, Health and Beauty Aids: \$83.5 million
- Automotive Fuels/Lubricants: \$78.0 million
- Apparel Stores: \$58.3 million

These observations reasonably indicate that more of this money would be spent by District 4 residents in District 4 if these residents had a broader array of stores at which to shop.

KEY FACTS

District 4 residents spent more than **\$1.9 BILLION** on retail goods in 2014.

Residents spent more than **TWO TIMES** as much as was supplied within District 4.

Basic needs like **FOOD, APPAREL** and **HEALTH AIDS** represented **MORE THAN A THIRD** of the unmet retail opportunities in District 4.

More than **2,900 HOUSEHOLDS** in District 4 **DO NOT HAVE A CAR**—meaning it is critically important for retail suppliers to be geographically **ACCESSIBLE**.

DEMOGRAPHIC PROFILE

POPULATION

2014 Estimate	153,294
2019 Projection	157,449
%Growth 2014-2019	2.7%

HOUSEHOLDS

2014 Estimate	43,433
2019 Projection	44,819
%Growth 2014-2019	3.2%

AGE DISTRIBUTION

Under 18	26.5%
18-24	10.7%
25-34	15.2%
35-44	12.5%
45-54	12.6%
55-64	11.3%
65 and Up	11.1%
Median Age	33.4

Source: The Nielsen Group



CITY OF SAN DIEGO
FEBRUARY 2015



This unique street festival celebrates the rich history, diverse cultures, and captivating energy of the people of Southeastern San Diego. This is a community event open to everyone. Admission is free.

ATTENDANCE

7,000 people
101 vendors
21 artists



MEDIA EXPOSURE

KKSD Jass.com
KBBK Radio
Voice & Viewpoint
Radio Latina
Filipino Press
KUSI
92.5 FM
The Monitor



ADVERTISING

200 posters
15,000 flyers
5 different series advertising different participants and partners
Social media filters for partners and participants to advertise themselves
30 Banners in strategic places in the community



BRAND EXPOSURE

Website
Facebook Page
Banner series
Entertainment banners
Filters for social media



SPONSORS

City of San Diego, Council District 4
Civic San Diego
County of San Diego
US Bank
Core National Renaissance
Jacobs Center for Neighborhood Innovation
UCSD San Diego Health
Ito Girard & Associates





Encanto Village

Project Information

Project Address:	6317 to 6357 Imperial Ave, San Diego CA 92114
Project Description:	Encanto Village is a 4-story, mixed-use development comprised of two buildings. The project contains 66 units of affordable housing, including one-, two-, and three-bedroom units. The street level facing Imperial Ave will contain common areas and commercial space for lease to multiple tenants. Multiple outdoor spaces are provided including a tot-lot and recreation area.
Gross Site Area:	50,280sf (1.15acre)
Building Gross Area:	76,058sf Retail = 3,967sf Residential Common Spaces = 5,392sf Residential Units = 48,072sf Walkways/Decks/Circ. = 17,258sf Utility & Maintenance = 1,369sf Tot-lot = 615sf Recreation Area for teens = 689sf
Building Height:	57'-0"
Parking:	66 total spaces
Units:	One-bedroom = 30 Two-bedroom = 18 Three-bedroom = 18 Total = 66 Units
Laundry:	7 washers and 7 dryers total



STUDIO E
ARCHITECTS

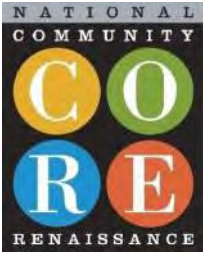
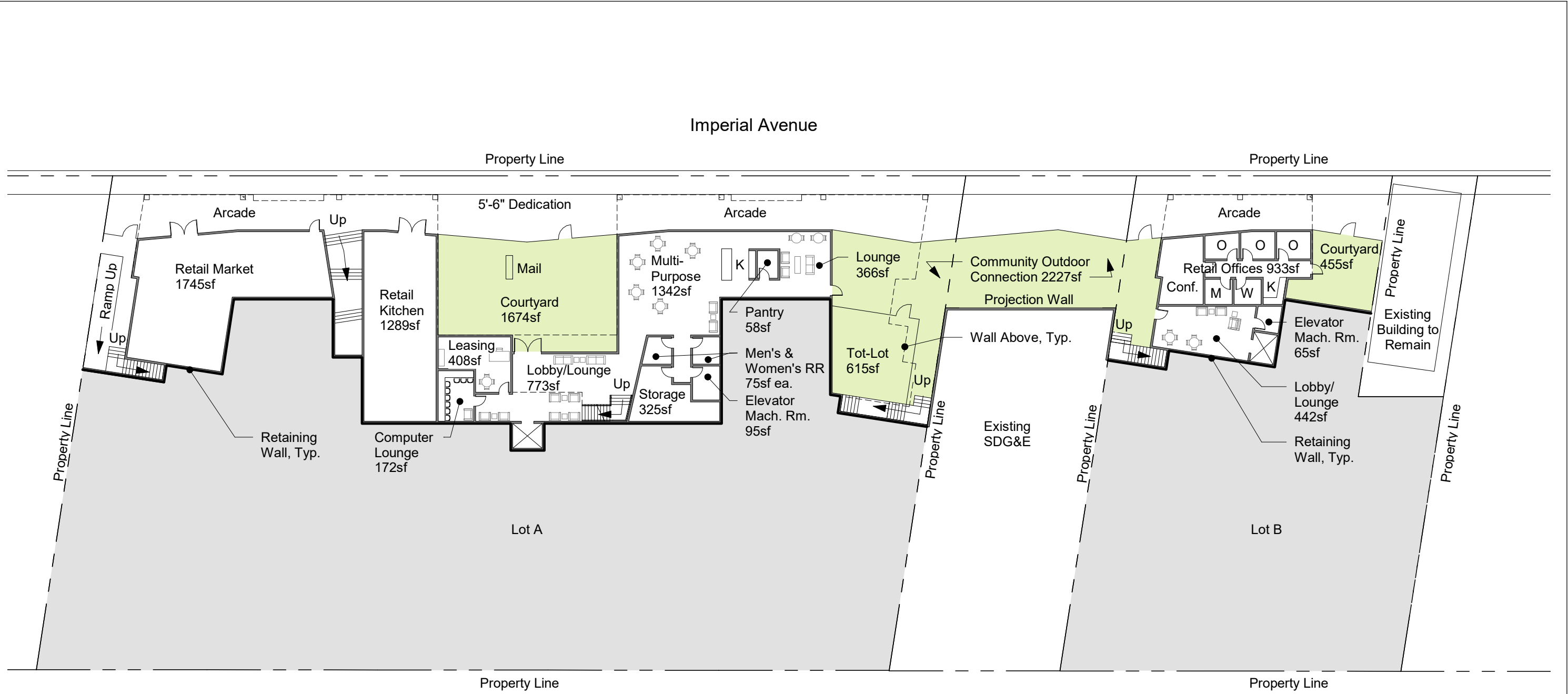
National Community Renaissance of California

Encanto Village

6317 to 6357 Imperial Ave, San Diego CA 92114

Title Sheet

Project number	16114
Date	02/23/17
Drawn by	MB
Scale	N.T.S.



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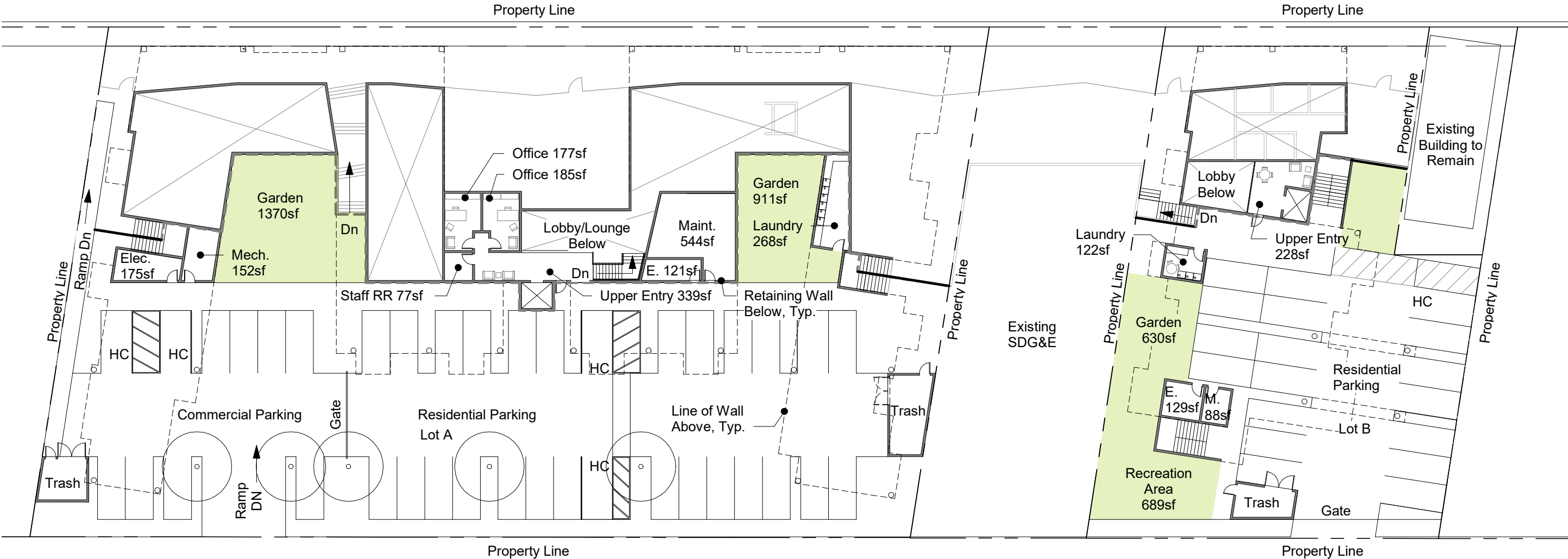
National Community Renaissance of California

Encanto Village

6317 to 6357 Imperial Ave, San Diego CA 92114

Street Level Plan

Project number	16114
Date	02/23/17
Drawn by	MB
Scale	1" = 30'-0"



Alley (Serving Madrone Ave Addresses)

Parking Tabulation	A	B	Total
Commercial	10	0	10
Residential	38	18	56
Total	48	18	66



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National Community Renaissance of California
Encanto Village
6317 to 6357 Imperial Ave, San Diego CA 92114

Parking Level Plan

Project number	16114
Date	02/23/17
Drawn by	MB
Scale	1" = 30'-0"



Unit Tabulation	A	B	Total	
1-Bedroom	21	9	30	46%
2-Bedroom	12	6	18	27%
3-Bedroom	15	3	18	27%
Total	48	18	66	100%



National Community Renaissance of California
Encanto Village
6317 to 6357 Imperial Ave, San Diego CA 92114

Level Two Plan (Level Three & Four Sim)

Project number	16114
Date	02/23/17
Drawn by	MB
Scale	1" = 30'-0"



Exterior Elevation - North



Exterior Elevation - South



National Community Renaissance of California
Encanto Village
6317 to 6357 Imperial Ave, San Diego CA 92114

Exterior Elevations

Project number 16114
Date 02/23/17
Drawn by MB
Scale 1" = 30'-0"



Exterior Elevation - East



Exterior Elevation - West



National Community Renaissance of California
Encanto Village
6317 to 6357 Imperial Ave, San Diego CA 92114

Exterior Elevations

Project number 16114
Date 02/23/17
Drawn by MB
Scale 1" = 30'-0"



1-Bedroom Mobility - 550SF



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National Community Renaissance of California

Encanto Village

6317 to 6357 Imperial Ave, San Diego CA 92114

Unit Plans

Project number	16114
Date	02/23/17
Drawn by	MB
Scale	1/4" = 1'-0"



2-Bedroom Typical - 753SF



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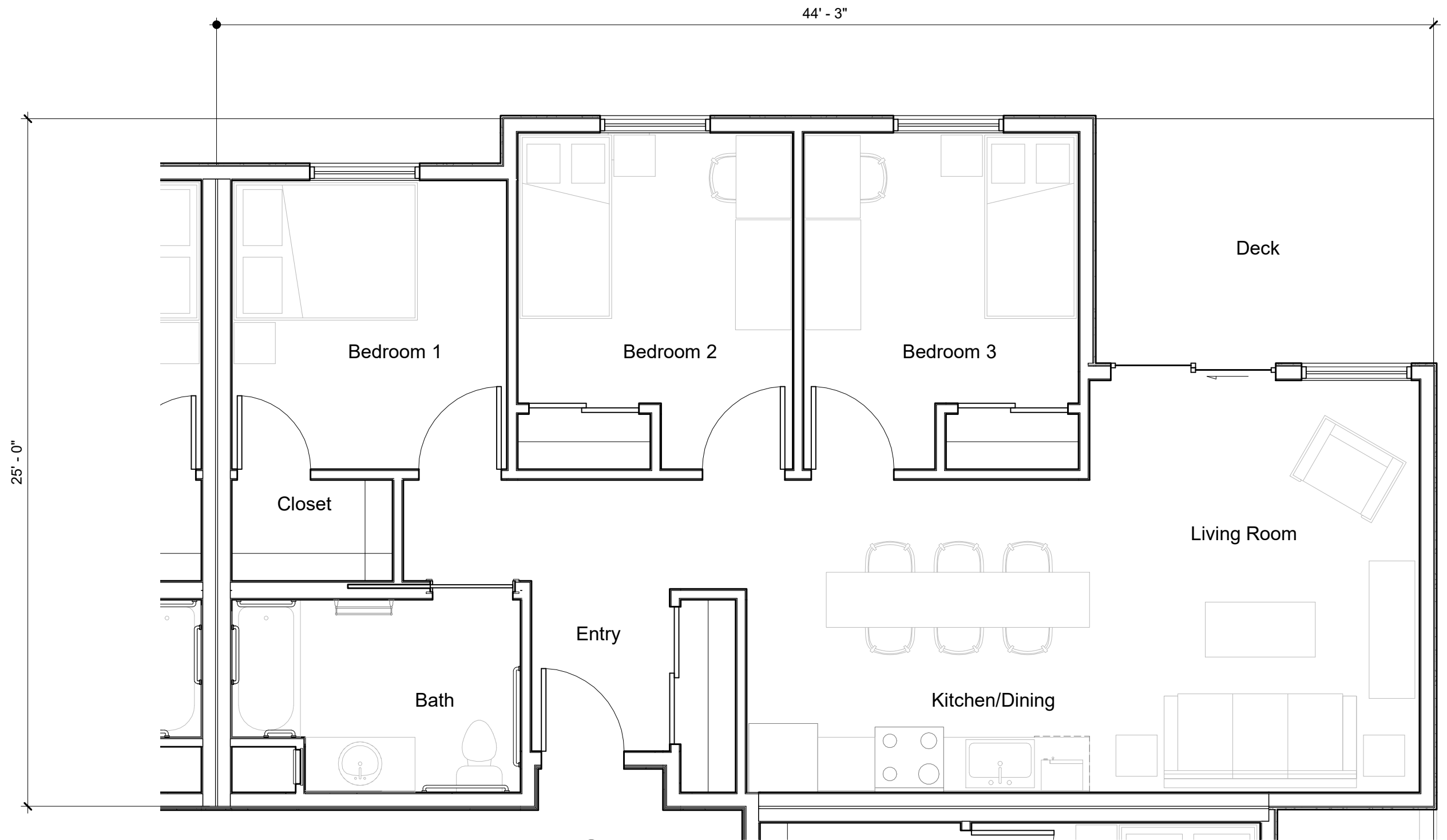
National Community Renaissance of California

Encanto Village

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Unit Plans

Project number	16114
Date	02/23/17
Drawn by	MB
Scale	1/4" = 1'-0"



3-Bedroom Typical - 970SF



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Encanto Village

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Unit Plans

Project number	16114
Date	02/23/17
Drawn by	MB
Scale	1/4" = 1'-0"



Encanto Village Trolley Transit Oriented Development

City of San Diego

New Construction Apartment Rental Family/Senior/Special Needs/Veterans/Retail Spaces

50,866 SF or 1.16 acres

September 15, 2017

The Encanto Community Plan Update was approved November, 2015.

National Community Renaissance owns several contiguous parcels within the “Encanto Village District”, a key walkable mixed-use transit oriented development nod. The sites have CN 1-4 zoning. The land use classification is Neighborhood Mixed-use Medium with a density of 30-44 per acre.

Encanto Village has all CEQA, NEPA and land use entitlements complete and will commence construction in March 2018. Construction completion will conclude near September 2019.

Not just affordable housing for Encanto residents. This is about access to opportunity, green, sustainable, walkable, bike able, with a wealth of mobility options including the Encanto Trolley located across the street and choice neighborhoods for homeless veterans, seniors and working families trying hard to make ends meet. The project also removes blight and hazardous materials. A built environment within cultural values.

Avoidance of Gentrification: A recent study from the University of California, Berkeley Institute of Governmental Studies found that affordable housing reduces displacement pressures at double the rate of market-rate housing. As more of California’s neighborhoods experience the effects of gentrification, placing affordable housing in those communities can help to ensure that families currently living in those neighborhoods are not displaced as the community transforms. As both a displacement prevention and cost reduction strategy, the best time for affordable housing to be built in gentrifying communities is before gentrification occurs.



Encanto Village incorporates 66 apartments, 4-story with surface parking accessed from the alley with additional parking tucked under the building along with 3,967 SF ground level retail fronting Imperial Avenue with homes on top. The 66 homes will provide 30 one-bedrooms, 18 two-bedrooms and 18 three-bedrooms. The development will also provide a large community room, leasing and management offices, separate office space for the Veterans Administration to provide case management services/follow-up with the formerly homeless veteran residents on-site, three on-site community gardens, play areas, smoke-free 100% property, meeting space as well as other outdoor amenities.

Retail Space Great Opportunities:

National Community Renaissance is working closely with the community to plan the retail. The retail spaces could include local job training, culinary training, leadership training, technology training, local restaurant, open market for fresh foods/produce (Project New Village), local coffee shop, offices, etc.

Affordability:

- The development will be affordable to seniors, families, veterans and persons earning 30% to 60% of San Diego County Area Median Income (AMI). Up to \$45,900 for a 1-bedroom; up to \$55,080 for a 2-bedroom; up to \$63,240 for 3-bedroom.
- 8 homes for veterans and their families

Rent Ranges:

One - bedrooms - \$441 to 919

Two - bedrooms - \$526 to 1,100

Three - bedrooms - \$578 to 1,266

One home will be reserved for an on-site manager.

A large community building will also be constructed as part of the project.

Resident parking will be provided with a combination of carports and uncovered parking, conveniently located to minimize travel distance to a resident's apartment. **Many other mobility options will be provided.**

A solar photovoltaic system or Solar Thermal will provide electricity/water heating to the development, helping to offset utility expenses and the development's dependency on the grid.



The project has been designed to meet the Design Guidelines set forth by the City and will **provide safe, healthful and universally designed sustainable buildings that qualify for LEED certification incorporating Low Impact Development (LID) best practices. Encanto Village TOD will achieve the minimum of LEED Silver or equivalent, Gold or Platinum and install energy-efficient appliances and water-saving fixtures. Solar power to energize the community spaces will be provided.**

The stretch of Imperial Avenue centered at the 62nd Street/Encanto Trolley station has long been a business district, and has potential to **grow into a more vital, mixed-use Village featuring small businesses, restaurants, local services, and a mix of housing types.**

The Community Plan is designed around a strong transit-oriented development (TOD) framework that focuses new higher density and intensity development within a village core in close proximity to major transit services. The plan enables development of complete neighborhoods that include a diverse array of residential, commercial, mixed-use, employment, and recreational opportunities. Higher density development will include urban design guidelines to foster enhancement of the public realm, pedestrian and bicycle movement, and public safety.

The Project is within:

- SANDAG Smart Growth Plan;
- Mixed-Use Transit Corridor;
- *Across the street from the New Promise Zone*
- Encanto Village Incentive District
- Imperial Corridor Master Plan
- Central Imperial Redevelopment Plan
- The Encanto Trolley Station (440 steps) away with High Frequency arrivals and departures

Promise Zone:

The Encanto Village TOD mixed-use development will achieve all six goals as set forth by the San Diego Promise Zone (SDPZ).

SDPZ comprises three of the City's most economically disadvantaged neighborhoods. SDPZ is characterized by high unemployment, low educational attainment, insufficient access to healthy foods, concentrated poverty, rising crime, **and the least affordable housing in the nation.**

Youth unemployment is a severe problem: 40.1 percent of SDPZ youth, aged 16-24, are unemployed compared to 20.5 percent of youth of the same ages across the city.



Recent rezoning (CPU approved by City Council November 2015), vacant land along high traffic corridors, and a central location that is well-served by public transit are assets that the SDPZ will build upon to bring economic vitality to these underserved communities.

The City of San Diego SDPZ and its partners have identified the following six goals to improve the quality of life and accelerate revitalization:

- Create Jobs
- Improve Economic Activity
- Reduce Violent Crime
- Expand Educational Opportunities
- Access Top-Quality Affordable Housing
- Promote Health and Access to Healthcare

PARCELS OWNED BY NATIONAL CORE:

6 Parcels (3 separate owners) now owned National CORE:

- 6317-23 Imperial Avenue APN's 549-140-03, 04, 05 and 06
- 6355 Imperial Avenue 549-140-08
- 6357 Imperial Avenue 549-140-09

CIVIC San Diego October 2015 Updated Master Plan:

Encanto Village TOD Mixed-Use Development is consistent with the Master Plan. The Plan seeks to invest in affordable housing developments that are proximate to public transit to reduce reliance on automobiles, minimize greenhouse gas emissions, and contribute to creating walkable communities in urban City neighborhoods. Therefore, projects located within one-half mile or 10 minute walking distance of multimodal transit stops, which provide bus or trolley lines with direct routes to employment centers are prioritized for funding.

The Master Plan prioritizes the revitalization of neighborhoods by removing blight and strategically selecting project sites in areas where neighborhood investments were in greater need. In addition, projects were carefully programmed and designed to activate the streets and catalyze revitalization of the surrounding areas. **Encanto Village TOD project accomplishes these goals.**

It is reasonably estimated that the proposed **Encanto Village TOD project will generate well over 100 construction jobs, and over 30 permanent jobs.** **National CORE is committed to local hiring.** **Encanto Village TOD project will also activate Imperial Avenue and contribute to revitalizing the**



surrounding neighborhoods.

Community Benefit - SDGE Substation Conversion/Beautification APN 549-140-07:

National CORE is working closely with SDGE on the conversion from the existing 12-4 Voltage Substation to Pad Mounts. The conversion process will be paid for by SDGE (approximately \$700,000) and must go through the lengthy Public Utility Commission process. The estimated time of approval, construction and completion is five (5) years. National CORE's part of the conversion will be to pay for the beautification process to include split-face block walls to "hide" the substation before, during and after the conversion process.

Please see exhibits showing how other San Diego communities have beautified large-scale substations prior to conversion to pad mounts.

Transit Oriented Development (TOD):

Encanto Village is a transit oriented development (TOD)

The future of the AHSC source by Strategic Growth Council (SGC) and State of California Housing and Community Development Department is unknown. National CORE is very much up to speed and is collaborating with several pro-active groups in California to ensure the long term viability of this program.

National CORE has hired 3rd party consultants in an effort to create a financing structure using 4% tax credits, tax-exempt bonds, AHSC funding and other sources for the proposed Encanto Village TOD project. The development team will also create a very competitive AHSC Concept application due in March/April 2017. Upon completion of the financial AHSC proforma, CORE will distribute the work product to CIVIC San Diego. In the meantime, CORE has included within this proposal a 9% tax credit financing structure to allow a "dual-tracking" approach (both 9% and 4%/bonds/AHSC).

The subject parcels are extremely fortunate to be considered high quality transit with 15-minute headway (departures/arrivals). The site is an excellent candidate to compete within the Transit-Oriented Development category of the AHSC funding. The site is within a Disadvantaged Area Community (DAC) which helps with competitiveness.

Parking Concepts:



National CORE's site plan shows .85 spaces per unit – surface parked. This is consistent with state law AB 744 on parking requirements, consistent with local City policy on parking standards near high quality transit sites and to reduce development costs.

A parking plan along with a variety of transportation mobility options (bus, trolley, LYFT, Zip Car, Uber, Car2Go, bike and other options will create an environment of “on demand” travel.

We are placing a large screen in the community room detailing the REAL –TIME times/location of Trolley and bus schedule services for our residents along with technology to locate Real Time departure kiosks and route calculators in certain areas of the buildings to provide the residents Real-Time Trolley and bus departures/arrivals.

All these efforts will induce the residents to use public and shared vehicles more and by doing so, reduce unnecessary driving and reduce GHG emissions. Residents will benefit by reducing their costs of owning their personal vehicles.

CORE will also install EV charging stations within the development site.

Car-Sharing:

With a combination of trolley, bus, shared cars (Lyft, Uber, Car2go, Zipcar), bikes, walking, electric cars (with onsite EV charging), etc, a significant reduction in GHG can be achieved. ***It is estimated that each car sharing vehicle replaces between 9 to 13 vehicles.***

Secured bike lockers will be provided so residents can be induced to use bikes as their first- and last-mile solutions. Residents can take their bikes on the bus and trolley cars per MTS regulations.

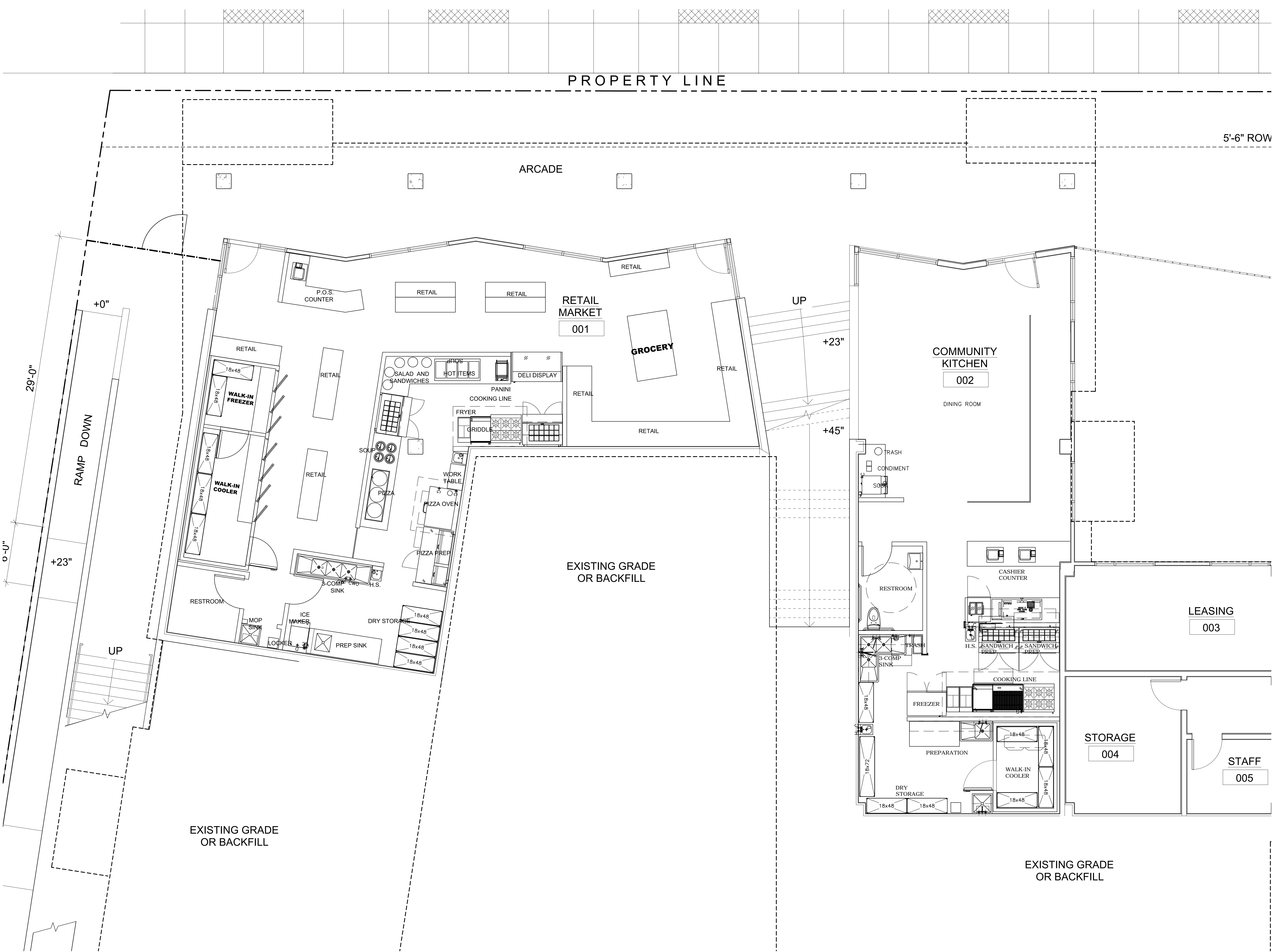
AHSC funds will help improve transit-related infrastructure that lead to GHG emission reduction (both on and off-site), such as better sidewalks or Pedestrian Street crossing signals for Akins Ave. CORE is working with MTS, City Transportation Department and SANDAG for off-site improvements.

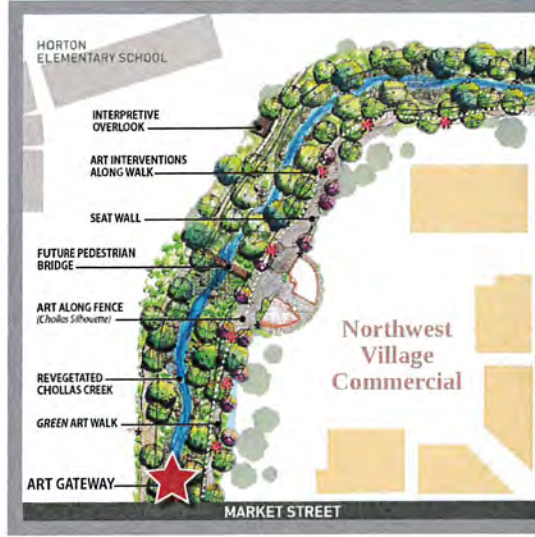
The proposed development is consistent with the intent of the redevelopment plans and advances the visions and goals of these plans by:

- Will achieve all six (6) goals of the SD Promise Zone;
- Producing special needs housing;
- Producing housing for families, veterans and seniors;
- Creating a range of housing opportunities and choices by providing quality housing;
- Providing opportunities for people to live and work in the same areas through the integration of mixed residential, commercial and recreational uses;
- Implementing development within the Imperial Avenue Corridor as the pedestrian –oriented core area with a mix of housing and retail;
- Eliminating blight through the development of underutilized parcels;
- Local job creation;
- Consistent with the Affordable Housing Master Plan;



- Implementing ride-sharing and many other mobility transportation opportunities;
- Green sustainable development;
- Clean Hazardous Materials from the sites.





PUBLIC ART PROJECT: CHOLLAS CREEK GATEWAY

Public art will be a welcome addition along Chollas Creek in the heart of Southeastern San Diego's Diamond Neighborhoods. Gateway art is also planned for a section of the creek near Market Street as part of the Jacobs Center for Neighborhood Innovation's restoration of the creek. The Jacobs Center received a \$30,000 grant from the National Endowment for the Arts, which it matched, to fund the selection of artists/artist teams as well as the planning, conceptual design, and final selection of the art work(s).

The conceptual designs followed the community input and recommendations included in the Jacobs Center's *Art+Design Plan* and *Activating Chollas Creek Plan*. The restoration of Chollas Creek and the addition of public art works will help enliven the creek and create places where residents and visitors can enjoy the outdoors.

The creek restoration also includes removing invasive plant species, re-planting native plants, redirecting creek flows to prevent erosion, and the construction of an observation deck and a pedestrian bridge to encourage activity and create a safer passageway for students from Horton Elementary School.

Artist Selection Process

The Jacobs Center received 40 applications from artists across the country and one from Spain. A selection committee made up of experts in arts and culture, education, land planning, and community stakeholders shortlisted three artists/artist teams to propose conceptual designs.

The artists were evaluated on the following criteria:

- ◆ Professionalism, artistic excellence, and experience working in the field of public art
- ◆ Proven track record of success
- ◆ Project management experience and technical expertise

- ◆ Demonstrated ability to work with community members and other artists in design development
- ◆ Understanding of the historic value or cultural heritage of place
- ◆ Ability to meet timelines and budget requirements
- ◆ Ability to work with an interdisciplinary team

The designs were on display for community feedback, which informed the committee's final selection, local artist **Roman de Salvo**.





About the Artist

Local artist, **Roman de Salvo**, is a sculptor and public artist whose work infuses the everyday with intrigue and surprise. His art is characterized by an inventive use of ordinary materials and objects, often involving energetic phenomena such as wind, water, fire, and electricity.

Since 2005, de Salvo has been making large-scale public sculptures that utilize the organic forms of trees. These projects include *Seven for Seven Trees*, a public playground in San José, and *The Riparium*, an expansive gateway structure for Ruocco Park in downtown San Diego.

Born in San Francisco, de Salvo received his B.F.A. in Sculpture from the California College of Arts & Crafts and his M.F.A. in Visual Arts from the University of California, San Diego.

DeSalvo's work featured internationally:

- ◆ **1994 inSITE'94** (San Diego)
- ◆ **1996 96 Containers – Art Across Oceans** (Copenhagen, Denmark)
- ◆ **2000 Biennial Exhibition** – Whitney Museum of American Art (New York)
- ◆ **2000 Giverny Garden Projects** – Musée d'Art Américain (Giverny, France)
- ◆ **inSITE2000/2001** (Tijuana, Mexico)
- ◆ **2001 Chain Reaction: Rube Goldberg and Contemporary Art** – Williams College Museum of Art (Massachusetts)
- ◆ **2002 California Biennial** – Orange County Museum of Art (Newport Beach, California)
- ◆ **2003 American Idyll for the Public Art Fund** (New York)
- ◆ **2003 Baja to Vancouver: The West Coast in Contemporary Art** – Seattle Art Museum
- ◆ **2005 Main Street Sculpture Project** – Aldrich Contemporary Art Museum (Connecticut)

ARTIST'S STATEMENT: ABOUT THE GATEWAY ART



Chollas Creek Riparian System

An array of riparian corridors fanning out across the county, Chollas Creek is an ecological network of enchantment.

Seeing the Chollas riparian system as a whole is fascinating. Its shape is complex, lacy, surprising and lovely. This shape is used as a crest to herald the importance and beauty of the Chollas watershed.

As it welcomes people to this place, it also engenders better stewardship of the watershed and greater community pride in the Chollas realm.



This project is supported in part by an award from the National Endowment for the Arts.

Gateway Arches

Canyons and riparian zones of the Chollas watershed have a distinct branching shape that is legible in satellite pictures. The arch design is derived from this shape. Names of major drainage corridors written in relief on the branches help people read the design as a map and to better know their city.

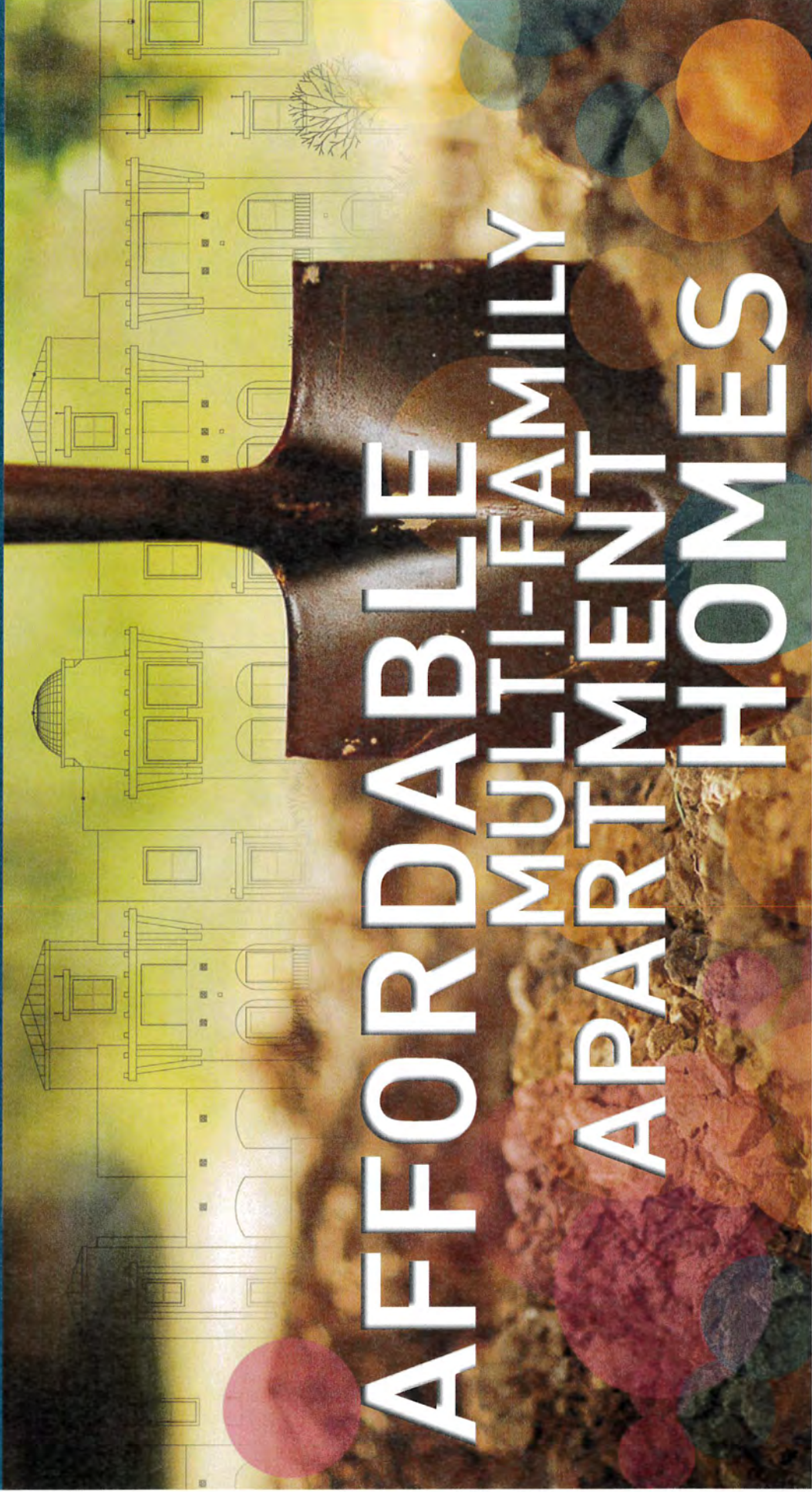
Gateway Columns

The columns are like cairns, a traditional way of marking trails by stacking piles of rocks. Built from Chollas cobbles to be irregular and organic, the cairns lend a monumentality that underscores the esteem of the Chollas watershed.



TROLLEY PARK TERRACE GROUNDBREAKING CEREMONY

AFFORDABLE MULTI-FAMILY APARTMENT HOMES



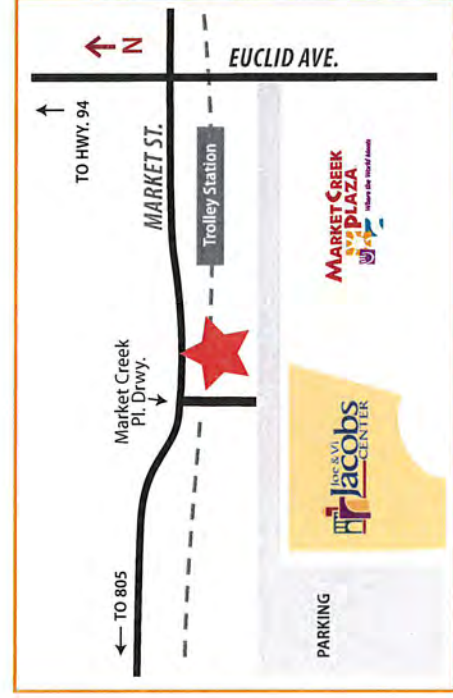
JOIN US TO CELEBRATE

the start of construction on 52 units of affordable multi-family apartment homes!

WEDNESDAY, JULY 15, 2015 | @ 3:30 PM

SOUTHEAST CORNER OF MARKET STREET AND MARKET CREEK PL. DRIVEWAY

FREE parking is available at the Joe & Vi Jacobs Center – 404 Euclid Avenue, San Diego, CA 92114



New Places to Call Home Are Coming to the Diamond Neighborhoods!

Located adjacent to the MTS Euclid Transit Center, this project will help create a more walkable community and is one part of transforming the Diamond Neighborhoods into a place where residents can live, work, play, and create. *Come be part of the revitalization!*

All are welcome to attend this FREE event. Contact Liz Faris, Communications Manager, at LFaris@JacobsCenter.org or 619.527.6161 ext. 376 with questions.



TROLLEY

PARK
TERRACE

4985

WILKINSON STREET





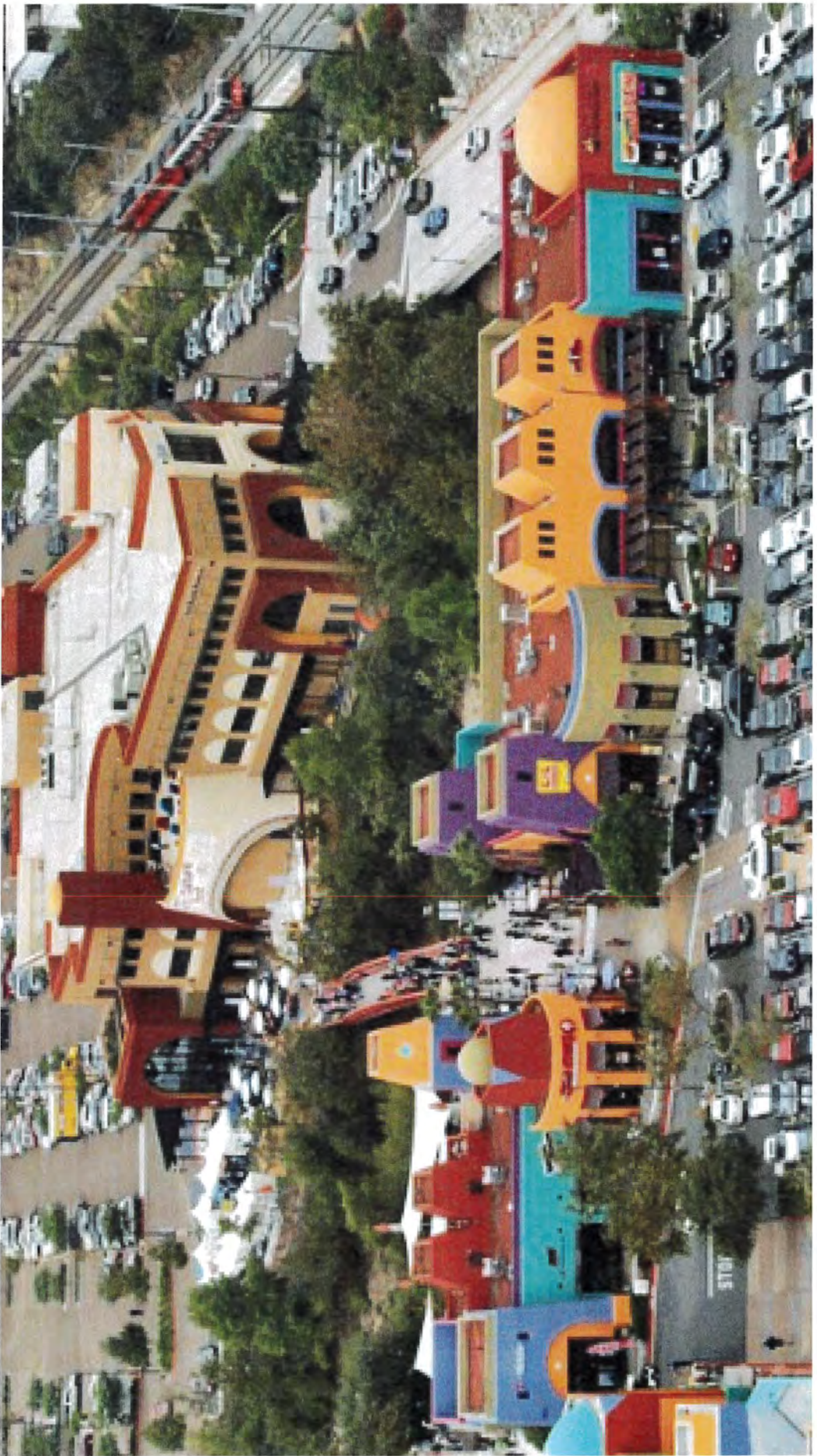


ULI SOCIAL EQUITY AWARD

Urban Land Institute, San Diego/Tijuana (2009)

OUTSTANDING BROWNFIELD TRANSFORMATION

U.S. Environmental Protection Agency (2009)



Parcel 10 Guymon Transaction Summary

Guymon is a 0.86 acre, 37,500 SF, property that is part of JCNI's Parcel 10 redevelopment site. It will be the new home of the Access Youth Academy (AYA) youth enrichment program. AYA uses the sport of squash as a basis for transforming the lives of underserved youth through academic enrichment, health, wellness, and social responsibility. Many of AYA's students come from Southeastern San Diego, but AYA's program is housed in leased space in the Miramar area and AYA must bus students a long distance to participate. Their goal is a permanent facility in the community they serve.

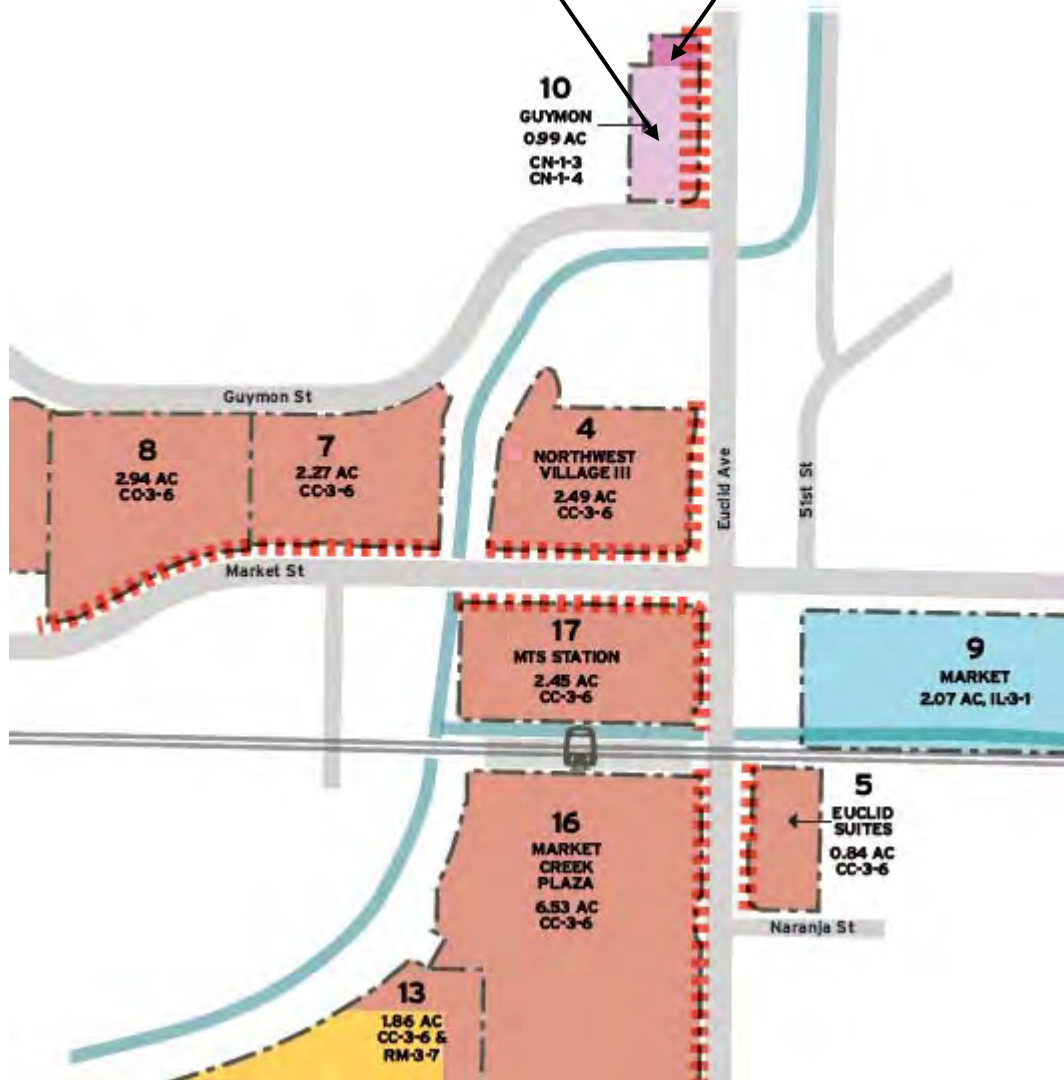
The attached plan shows the location of Parcel 10, and drawings of AYA's proposed facility are also included.

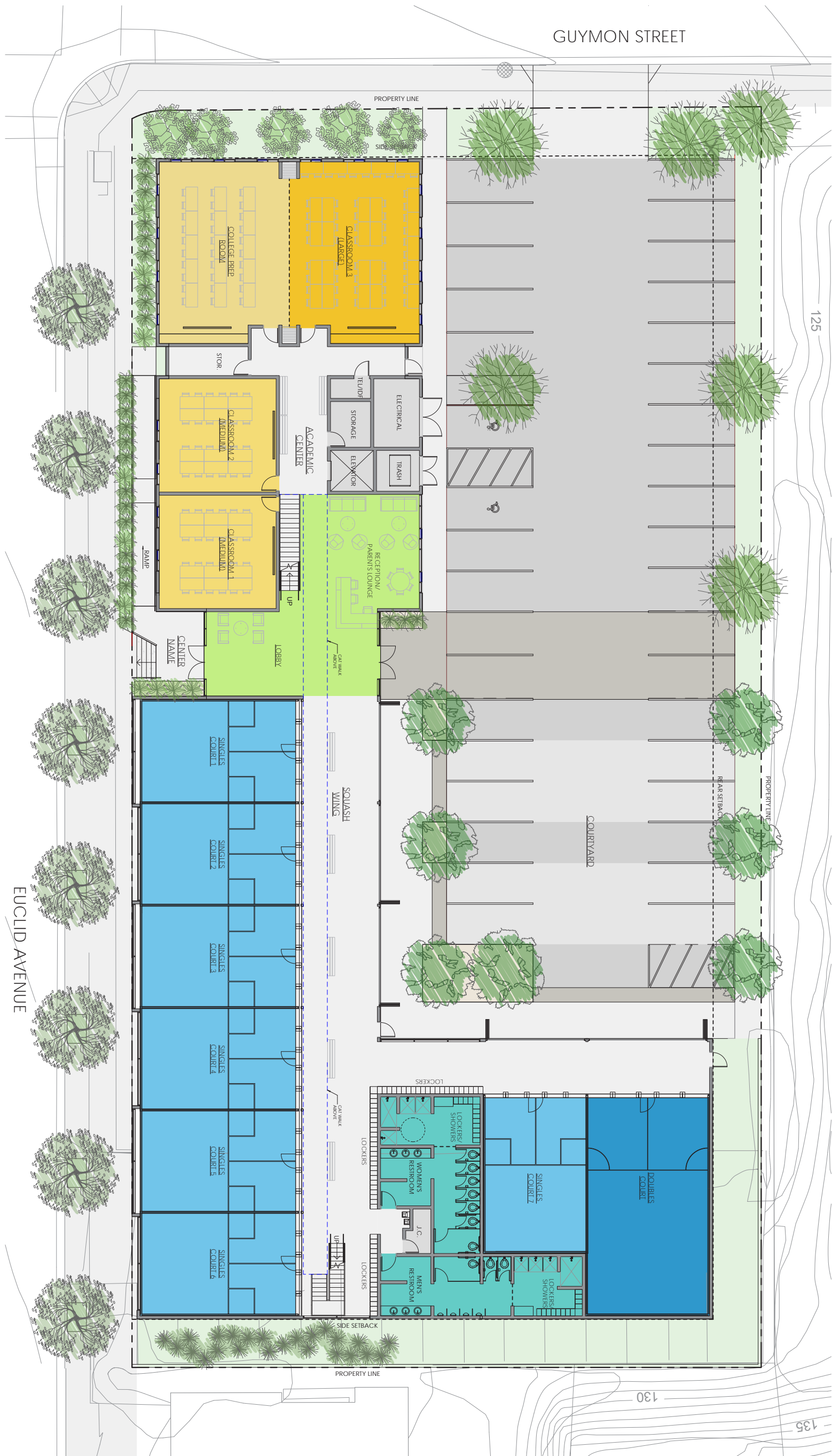
A purchase and Sale Agreement (PSA) was executed in May. The purchase price is \$714,767. AYA has completed due diligence, paid a hard money deposit, and the property sale is on track to close on 12/1/17. To start construction of the project, AYA has significant fundraising requirements, almost \$4M, and will also use New Markets Tax Credits (NMTC) as funding for the project. Because of the time required to finalize their funding sources, construction is not expected to start until May, 2018. The new facility will open in fall of 2019.

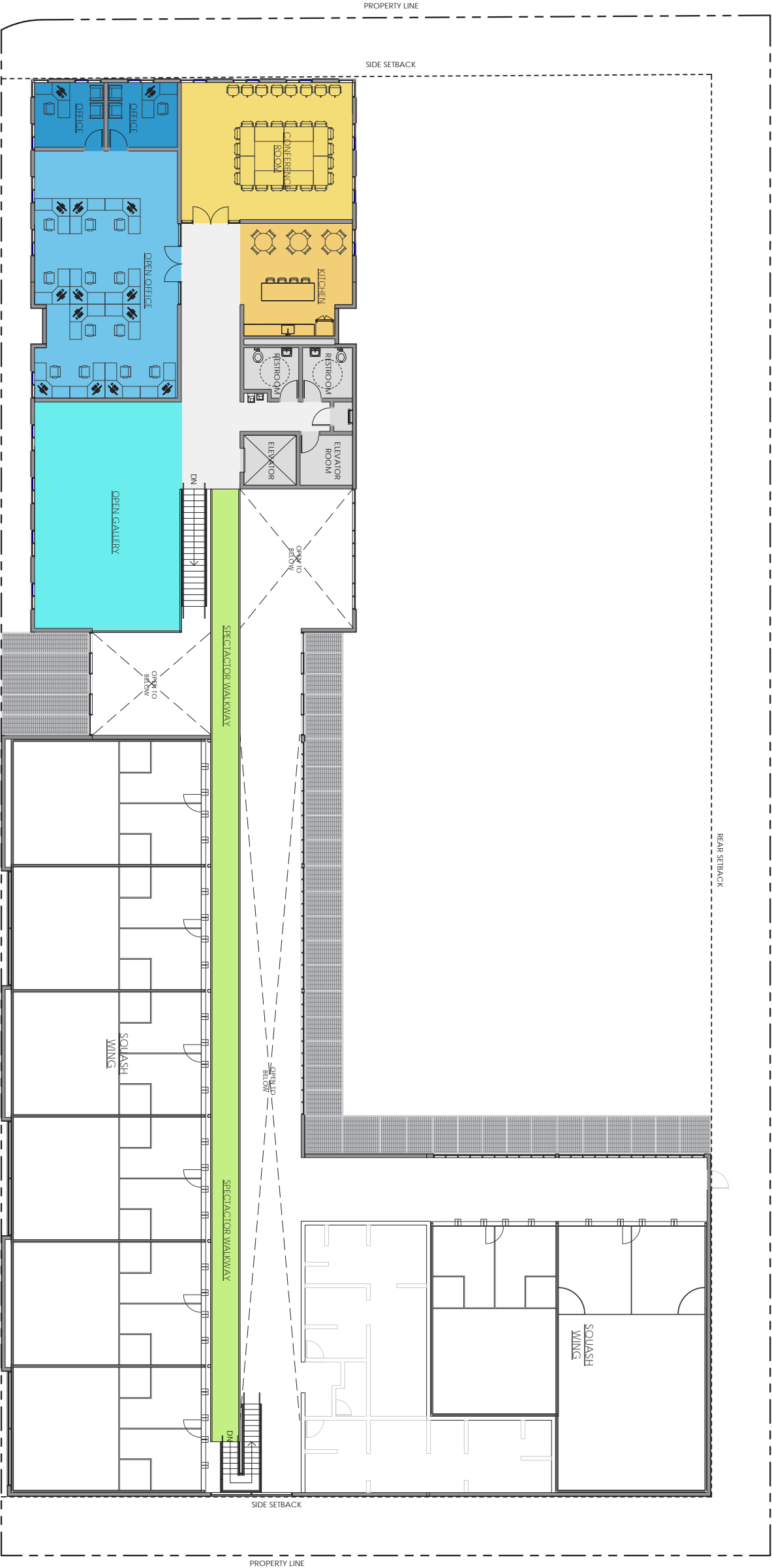
If AYA fails to start construction of the proposed facility before 12/31/18, JCNI has an option to repurchase the property. The NMTC program, established to support job generating businesses in underserved communities, has strict requirements for starting and completing projects. JCNI is relying on these requirements to ensure completion of the project, so NMTC funding is a requirement in the PSA.

Guymon Access Youth Academy
Project Site

Little Guymon Veterans Affordable
Home







SECOND FLOOR PLAN





AERIAL VIEW FROM SOUTHEAST



VIEW FROM EUCLID AVE. (EAST)

05.23.2017



VIEW FROM PARKING ENTRY TO SOUTHWEST



ENTRY FROM EUCLID AVENUE



VIEW OF COURTYARD AND REAR ENTRY



LOBBY ENTRY FROM EUCLID AVENUE



VIEW OF RECEPTION / PARENTS LOUNGE



VIEW INTO SQUASH WING



VIEW FROM SQUASH WING INTO COURTYARD

February 2016

