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Information, Resources
and Recommendations**

Michelle Sudgen-Castillo

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San Antonio Neighborhood Analysis: Community Information, Resources and Recommendations

Michelle Sudgen-Castillo



The University-Oakland Metropolitan Forum is a partnership of the University of California at Berkeley; California State University, Hayward; Mills College; Holy Names College; the Peralta Community College District; and the Oakland community.

University of California at Berkeley
Institute of Urban and Regional Development

SAN ANTONIO NEIGHBORHOOD ANALYSIS:
COMMUNITY INFORMATION, RESOURCES AND RECOMMENDATIONS

Michelle Sugden-Castillo
PROFESSIONAL REPORT

Submitted in partial satisfaction of the requirements for the degree

of

MASTER OF CITY PLANNING

in the

Department of City and Regional Planning

of the

UNIVERSITY OF CALIFORNIA, BERKELEY

SPRING 1996

APPROVED

Professor Michael B. Teitz, Chair

Victor Rubin, Committee Member

Heather Hensley, Office of Economic Development and Employment, City of Oakland, Outside
Committee Member

Michelle Sugden-Castillo is a HUD Community Development Work Study Program Fellow working with the University-Oakland Metropolitan Forum while pursuing a Masters in City Planning Program at UC Berkeley. This Professional Report originated as part of her work in the San Antonio district with the Neighborhood Commercial Revitalization program of the City of Oakland's Office of Economic Development and Employment. She expanded the analysis as a student in City Planning 298a (Spring 1996), taught by Victor Rubin. The opinions expressed in this report are those of the author, and do not represent official positions of the City of Oakland or the University of California at Berkeley.

For more information on the U.S. Department of Housing and Development's Community Development Work Study Program, contact: University Partnerships Clearinghouse, P.O. Box 6091, Rockville, MD 20849-6091. Phone: 1-800-245-2691, Fax: 301-251-5767, E-mail: oup@aspensys.com
World Wide Web: <http://oup.aspensys.com:89>

For information on the University-Oakland Metropolitan Forum and its publications, write to: University-Oakland Metropolitan Forum, c/o IURD, 316 Wurster Hall # 1870, University of California at Berkeley, Berkeley CA 94720-1870. Phone: 510-643-9103, Fax: 510-642-0908

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This professional report provides community information, resources and recommendations to address issues which community members and local organizations have identified as significant for the revitalization of the San Antonio Community Development District in the City of Oakland. It gives background information on the community, analyses important issues and provides recommendations for future actions. The main components of the report are: area description, community profile, neighborhood commercial revitalization issues and recommendations. The project is part of a wider report being prepared by the staff of the Neighborhood Commercial Revitalization Program of the city's Office of Economic Development and Employment.

I. EXECUTIVE SUMMARY

The San Antonio District has the reputation of being a true blend of cultures, with many strengths and opportunities for growth. This inner city community, however, also has been struggling to make ends meet as it has been neglected for many years.

This report on San Antonio builds upon the efforts of many who have worked for the improvement of the District. Specifically, the University-Oakland Metropolitan Forum, graduate students from the City and Regional Planning Program and staff from the Neighborhood Commercial Revitalization Program have been important players in studying this community. This project is part of a greater Neighborhood Commercial Revitalization report being prepared by the Neighborhood Commercial Revitalization Program in the Office of Economic Development and Employment (OEDE) of the City of Oakland.

The report provides community information, resources and recommendations to address issues which community members and local organizations have identified as significant for the revitalization of the area. It gives background information on the community, analyses important issues and provides recommendations for future actions. The main components of the report are:

- Area description: Many of the residents in San Antonio have recently moved to the area and therefore many want to understand their community's history. This section will look at San Antonio's boundaries and history.

- Community Profile: San Antonio has experienced dramatic population changes in the last decade. This section looks at who resides in San Antonio and where the residents live by discussing the resident description and housing characteristics.
- Neighborhood Commercial Revitalization Issues: The community has identified many issues that need to be address to improve their quality of life . These include issues such as safety, physical environment, neighborhood organization, economic development and youth development among others. This section of the report will look at two of these issues in more detail: Neighborhood Organizing and Economic Development.
- Recommendations: The last section discusses the vision, goals and strategies by issue area which will be incorporated in the wider NCR report.

II. INTRODUCTION: PURPOSE OF THIS STUDY

The Neighborhood Commercial Revitalization (NCR) staff of the City of Oakland's Office of Economic Development and Employment has worked in conjunction with the University-Oakland Metropolitan Forum on planning issues in the San Antonio Community Development District Area since 1988. The area has been the focus of a series of studies carried out by graduate students from the Department of City and Regional Planning at the University of California, Berkeley. This report builds upon the efforts of many who have worked for the improvement of the San Antonio community throughout the years. Also, it provides information for the second phase of the NCR process which encompasses a community action plan formulation and a community design plan.¹

This professional report is part of a greater existing conditions report being prepared for San Antonio's commercial zone by the NCR staff. The Neighborhood Commercial Revitalization report is intended to serve as a base document for future work in the San Antonio Community Development District by the Office of Economic Development and Employment and representatives working to improve the lower San Antonio Neighborhood. Furthermore, this existing conditions report will be expanded to include sections that address safety, recreation, land use and zoning, youth and art. This report has four major purposes: (1) revise, update and summarize data and issues studied in past reports in light of the priorities of community groups and local institutions; (2) update the Coro Foundation fellows business inventory and a market analysis conducted in 1990 to understand how the business development opportunities in the commercial district have changed after the construction of various mixed-use developments on East 14th Street; (3) describe community organizing efforts in the neighborhood; and (4) recommend future strategies and actions to further the revitalization efforts in the area.

This report serves as a source of community information, resources and recommendations. Specifically, the San Antonio Neighborhood Planning Council, a coalition of community organizations and residents, will use the information provided to

¹ See Appendix A for more information on the NCR Planning Process.

further their understanding of the dynamics of their district. It will also serve as a resource for the Neighborhood Plan being prepared by this group which includes four technical reports: demographics, housing conditions, economic development and land use.

The Neighborhood Commercial Revitalization (NCR) Program

The Office of Economic Development and Employment of the City of Oakland is actively developing revitalization action plans for neighborhood commercial areas located throughout Oakland's Community Development Districts. Previously, each City department focused on a particular policy component of a selected community and lacked the opportunity to examine other components and collaborate with other departments working in a specific area. The NCR program involves merchants, residents, property owners, community organizations and City staff in collaborative efforts to improve the quality of life in neighborhood shopping districts and residential areas. The program combines existing business assistance and loan programs with comprehensive research on the prevailing physical, demographic and economic conditions in the NCR areas.

The NCR planning process includes an inventory of existing economic, demographic and physical conditions; a market analysis identifying retail gaps and constraints; a physical analysis and urban design plan recommending design guidelines, streetscape improvements and catalyst development projects and an implementation strategy for revitalization efforts in the NCR area.

Envisioned as a working document, the NCR Plan will become a guide for the future development and revitalization of the commercial corridor by providing useful data on conditions in the area, identifying business development opportunities, recommending land use or regulatory changes, identifying needed physical improvements and creating specialized business assistance programs.

Acknowledgements

This report was prepared with the assistance of the City of Oakland's Office of Economic Development and Employment (OEDE), the East Bay Asian Local Development Corporation (EBALDC) and the University-Oakland Metropolitan Forum.

Other assistance was provided by the Americorps volunteers working at the Neighborhood Commercial Revitalization Program, who carried out the business inventory in the commercial corridor during the summer of 1995. Alice Wu, an Oakland Forum and NCR intern, provided feedback and encouragement. Rick Jacobus, a master's student at the Department of City and Regional Planning, worked with me preparing the housing characteristics chapter as part of a paper for a Housing Policy course last Fall. Heather Hensley, Teresa Navarro and Jennifer Cooper, at the NCR Program, were not only a source of information and technical assistance, but also of moral support. Mi Yeong Lee, Helen Shor and Hiroko Kurihara, at EBALDC provided me with much information and motivation. Without their grassroot work in the community, I would not have been able to have such a full experience working in San Antonio. Victor Rubin, Director of the Oakland Forum, provided continuous faith in my abilities to finish this project and the Oakland Seminar carried out by him this Spring provided the structure and support network needed to finish this report.

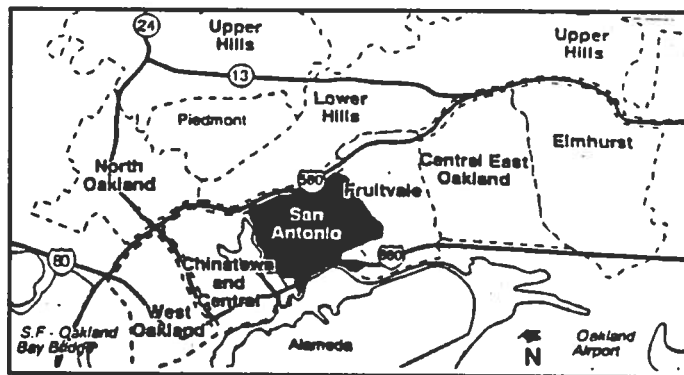
III. AREA DESCRIPTION

Boundaries

The San Antonio Neighborhood is one of seven community development districts of the City of Oakland. It is located south of Chinatown and north of the Fruitvale district and it is right in the center of these seven districts. The District is bounded by Lake Merritt to the Northwest and 28th Avenue to the Southeast. It extends Northeast to the MacArthur Freeway (I-580) and Southwest to the estuary. The San Antonio District is an amalgamation of different neighborhoods and communities. Eleven smaller neighborhoods make up the district, all of which have individual histories. This report concentrates on the lower San Antonio area which includes Census Tracts 4054, 4059, 4060 and 4062 and

specifically on the
Neighborhood
Commercial Revitalization
Area which extends from
1st to 28th Avenues
between East 11th and
15th Streets. See figure 1.

Figure 1: San Antonio Area Map



History

The San Antonio Neighborhood area has a rich history. One can appreciate its history by walking or driving in the area and identifying many buildings that have survived since the mid-nineteenth century. The Clinton and San Antonio neighborhoods were two of the earliest residential areas in the City of Oakland and have experienced cycles of growth and decline throughout the years.

The East Bay Region was first inhabited by Ohlone Indians, followed by Spanish Californios. The San Antonio Community Development District takes its name from the

Rancho de San Antonio, a 44,000 acre land grant given to Don Luis Maria Peralta, a retired military officer, by the Spanish crown in 1820. Rancho San Antonio had more than 13 miles of East Bay shoreline from the present City of San Leandro to that of Albany and stretching east to the summits of the Contra Costa hills. After his death, Don Luis Maria Peralta's son sold various plots of land to Moses Chase and three brothers named Patten, who had farmed the Peralta land for wheat and barley. In 1854, the land which extended from Lake Merritt to present day 13th Avenue was subdivided and renamed the village of Clinton after Moses Chase's intended bride, Mary Ellen Clinton.

The Clinton Park subdivision was soon followed by the subdivision of the San Antonio tract east of 13th Avenue to 23rd Avenue which was becoming a vibrant town around the intersection of 13th Avenue and the wharf. In 1867, a third little town called Lynn was established to the northeast of Clinton. By 1870, all of these three towns were incorporated as the greater township of Brooklyn with a combined population of about 1,603. The population began to grow by late 1868 with the completion of the 12th Street Dam, built by Samuel Merritt, which allowed direct access to the area from Oakland. Transportation improvements contributed to the area's popularity as a desirable residential location. By the early 1870's, development had extended westward toward the Lake with spacious homes and a large hotel located at Washington Square. The township of Brooklyn was then incorporated into Oakland in 1872.

During this period of growth, Brooklyn attracted prominent businessmen and civic leaders from both Oakland and San Francisco. Brooklyn residents in the late 1890's included: State Senator Frank Moffitt, Gertrude Stein, Anthony Chabot, California Supreme Court Justices Henry Melvyn and Frederic Fenshaw, Jack London, Julia Morgan and Robert Louis Stevenson.

Accessibility to San Francisco from the 13th Avenue Pier, as well as to downtown Oakland across the 12th Street Dam, made Brooklyn increasingly popular. Beginning with the 1906 earthquake and continuing through World War II the influx of newcomers placed huge pressures upon the available housing stock and city services. World War II saw a continuation of this housing and service demand as thousands of workers employed by Kaiser Shipyards in Alameda sought homes in the area. The desperate need for

wartime workers offered opportunities to women, African-Americans and other minorities whose opportunities for employment were limited elsewhere. The immigrants came from all parts of the country, but specifically from the southern United States. The upsurge in population caused large homes to be subdivided into apartments and many other homes were razed to be replaced by apartment buildings.

The slow transformation of the area from a quiet suburban residential district to a higher density urban neighborhood accelerated in 1955 when the Clinton Park neighborhood was declared an Urban Renewal Area. Subsequent redevelopment efforts resulted in the demolition of approximately 117 structures and the construction of over 1,000 apartment units. Although the efforts by the federal government provided needed affordable housing, the program failed to respect the rich architectural history and context of this section of town. Modern apartment buildings were set besides beautiful Victorian homes. The federal housing programs of the 1960s and 70s continued the trend by encouraging construction of large apartment complexes for low and moderate income residents. The efforts to preserve the existing historic buildings and to stop development has been the plight of various community groups in the District. In the 1980s, these groups were successful in getting the City to impose a moratorium on the use of manufactured housing in the neighborhood.

During the 1960s and 70s, the neighborhood experienced “white flight” as many middle class European Americans moved to the suburbs. As middle class residents left, economic disinvestment continued. Over the last decade, Bank of America, Wells Fargo and Sanwa Bank all closed their branches. The closing of the Montgomery Ward store in 1982 left 1 million square feet of commercial space vacant on East 14th Street and the building is still an eyesore for the community. East 14th Street, which once served as an important regional commercial thoroughfare, lost its appeal after the construction of the Nimitz Freeway (880) in 1949. The traffic that once travelled through the commercial corridor by passed the area to the suburbs.

The San Antonio neighborhood continues to exhibit population changes and a shortage of housing as it has become one of the most popular sectors of Oakland among immigrants. Through the federal relocation programs, Southeast Asian refugees were

dispersed throughout the United States during the late 70s and early 80s. However, since 1985, a “secondary migration” took place when refugees began to migrate within the country, concentrating in areas where the climate was more hospitable and Asian goods and services readily available. The San Antonio community is now serving as an important enclave for recent arrivals. The new population completes the tapestry of many who have lived in the district. The more recent arrivals are replacing and mixing with Mexican Americans, African Americans, American Indians and European Americans which make up the rest of this community.

IV. COMMUNITY PROFILE

Resident Description

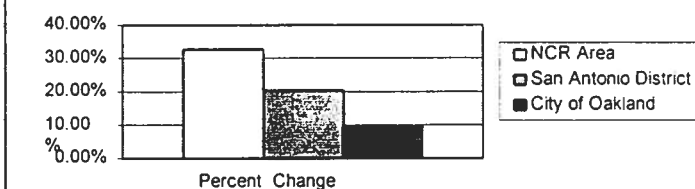
"San Antonio has the reputation of being a true blend of cultures."
Areeya Chumsai-The Oakland Tribune

The most prominent characteristic of the San Antonio neighborhood is probably its ethnic diversity. Compounded with this is the fact that nearly half of the City's population growth in the past decade took place in this district and in the adjacent district of Fruitvale. According to the City's General Plan, rapid population growth in this area actually began during the 1970's, but increased quickly during the last decade.

This increase in population has impacted all sectors of this community, particularly schools, service providers, and the business community. The NCR area, consisting of Census Tracts

4054, 4059, 4060 and 4062, has experienced a 33% increase in population in the past decade, a dramatic growth, see Figure 3. The growth in the San Antonio District as a whole is not as dramatic; population growth has occurred mainly in the areas bordering the commercial corridors of East 12th and East 14th Streets. San Antonio's growth has contributed to Oakland's 9.69% growth rate during the 1980s and the 1990s, reversing the trend of population loss during the seventies.

Figure 2: Population Growth by Area (1980-90)

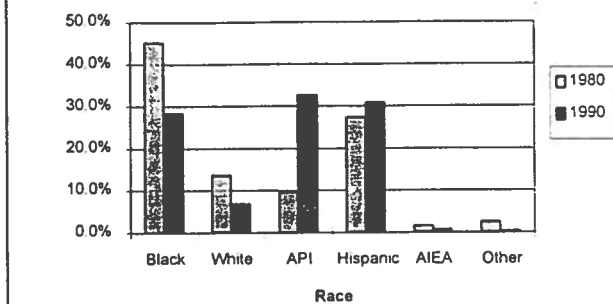


Source: 1990 Census

DIVERSITY

The increase in population has further diversified a neighborhood which already prides itself for being one of the most racially diverse in the City of Oakland. According to the 1990 Census, most racial minority groups are fairly equally represented in the area, see Figure 3.

Figure 3: Population by Race (1980 & 1990)



Source: 1990 Census

The growth in population in the NCR study area is dominated by the influx of Asian immigrants, which has increased 351% in the last decade. More than 20% of the City's Vietnamese, Cambodian, Laotian and Filipinos residents are concentrated in the NCR area.² African American and Latino populations have also grown in absolute numbers, but because of the dramatic increase in the API population, reflect smaller percentages as a whole. Whites tend to be declining in actual numbers.

In addition to the changing population structure, this area, like the rest of Alameda County, has been increasingly populated by foreign born persons. In Alameda County, 51,640 people migrated to the United States from 1986-1990.³ Seventy-two percent of this total were API and 11% of the total immigrant pool were Central and South Americans.

In 1980, people born outside of the United States in the NCR Area numbered 4,905 residents. By 1990 this number had almost tripled to 12,451, constituting 45% of the area's population. Not surprisingly, 54% of the people in the NCR Area speak a language other than English at home. Of those people, 44% are Spanish speaking and 43% speak one of the ethnic Asian languages. The fact that more than half of the population speak a language other than English has great implications on the type of outreach and services that are provided in this area. Specifically, outreach and services in

² East Bay Asian Local Development Corporation, New Chinatown Constituency Report, 1994.

³ East Bay Asian Local Development Corporation, New Chinatown Demographic Report, 1994.

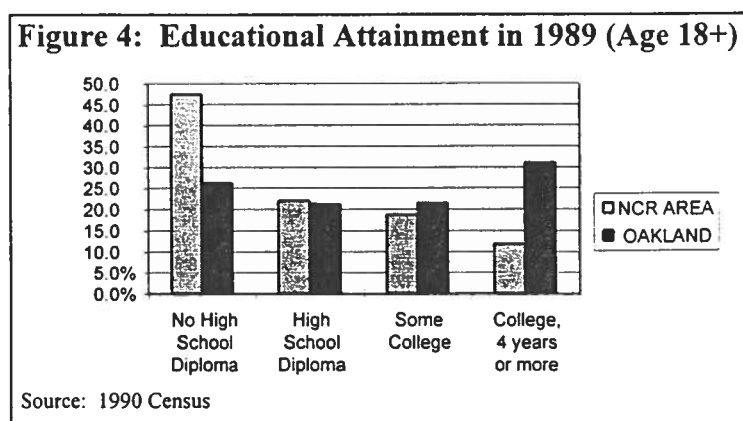
the areas of education, voter registration and any city activities that involve citizen participation like planning, housing, economic development and social services.

AGE

The population in the San Antonio NCR Area's is relatively young when compared to other parts of the City of Oakland. The most salient trend, in terms of age distribution, is that over one third of the area's population consist of children under the age of eighteen. Thirty-four percent of the population was under 20 years of age compared to the City wide average of 27.5%. This will have major implications on the utilization of public school facilities, availability of after school programs, transit accessibility for young people, youth services and recreation facilities in the area. Data from the Unified School District indicates that 1990 enrollment in nearly all elementary schools in the San Antonio/Fruitvale area exceeded the capacity for which the schools were built. The second largest age group in the area is 25 to 34 year olds, who account for 20% of the total population. Seniors are not as strongly represented in the area and they only account for seven percent of the population.

EDUCATION & EMPLOYMENT

The neighborhood's educational attainment level is lower than that of the City. The biggest contrast is seen between people without high school diplomas in the two areas. Persons eighteen and over which have graduated from high school in the area is 53% compared to 74% for the City of



Oakland. Figure 4 shows that 47% of people 18 and older have not received high school diplomas compared with 26% in Oakland.

Of persons enrolled in school in 1990, four percent were enrolled in primary school, 74% in elementary or high school and 24% were in college.

In terms of economic stability, of 86% of the population in the labor force, 14% were unemployed as of 1990, a higher unemployment rate than the San Antonio District and Oakland, which had rates of 10.4% and 9.5% respectively. Of the NCR population that is employed, 34% work in the retail trade and service industry, 16% work in professional service and 16% work in the manufacturing sector. In contrast, the percentage of people working in professional services in Oakland is much higher at 29% and those working in trade and services is lower at 28%. Furthermore, only 11% of Oakland's population works in the manufacturing sector.

If one takes into account the fact that there is low educational attainment in the area and that the majority of the jobs held are not professional or skill based one can say that the area is bringing in less money than the rest of Oakland. Vocational and employment programs must therefore be targeted to this area to build human capacity and skills.

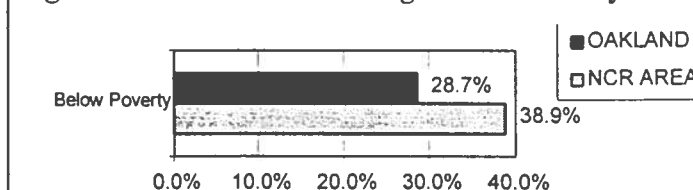
INCOME & POVERTY STATUS

The residents of the NCR Study Area have lower income levels and higher poverty rates than Oakland. Family Income is the income that a family receives from all household members over 15 years of age. Median family income in the NCR area in 1989 was \$20,462 compared to Oakland's \$31,755. This reflects a 35% difference in terms of income received by these families. The trend is similar comparing Oakland's and the NCR Area's household median income. While in Oakland the median household income is \$27,095, in the NCR area it is only \$19,868 dollars.

In the Bay Area, a household income below \$16,000 is considered poverty level. In the NCR Area 38.9%

of the households earned less than \$15,000 in 1989. See Figure 5.

Figure 5: Households Living Below Poverty in 1990



Source: 1990 Census

Housing Characteristics

The following section describes the San Antonio housing stock and needs. The analysis is expanded to include the entire Community Development District because the Neighborhood Council is interested in understanding the housing situation for the whole area.

HOMEOWNERSHIP

The rate of homeownership in the district is half that of Oakland overall. Twenty four percent of San Antonio residents are homeowners compared to 42% of all Oakland households. The overall rate conceals very large differences by tract and by race even within tracts. Map 1 shows that homeownership is highly concentrated in the south east corner of the district near Fruitvale Avenue.

The racial distribution of homeownership in the district is more complicated. Table 1 shows the homeownership rate by race for each tract. For all racial groups the homeownership rate within the district is lower than the citywide rate. However, for Oakland as a whole, whites have a much higher homeownership rate (51%) than other groups but in San Antonio Asians have a higher rate (32%) than whites (24%). While black homeownership (18%) in the district is still six percentage points below the white rate, for Oakland overall the black rate (35%) is 16 points below the white rate.

Homeownership Rates by Tract

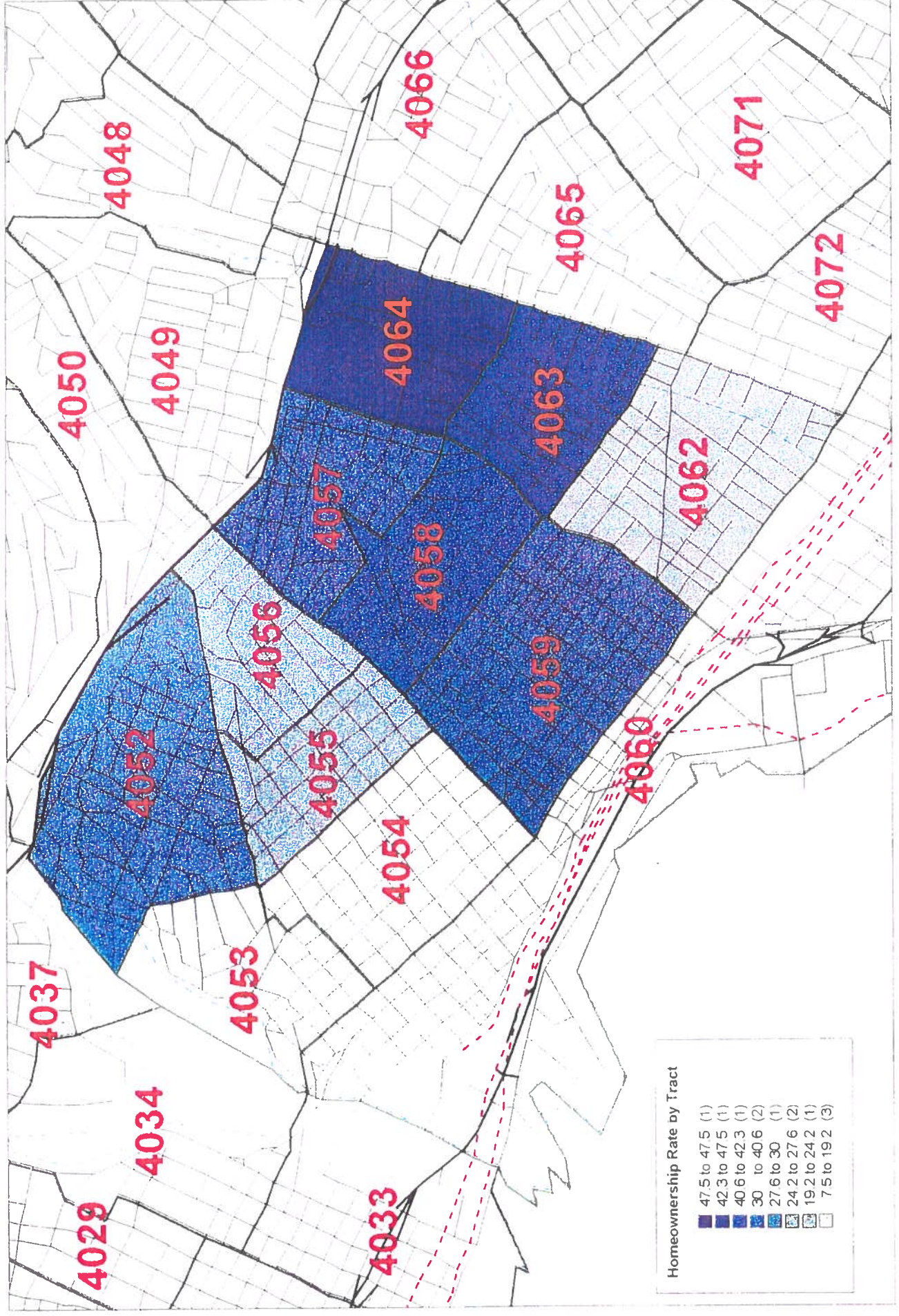


Table 1: Homeownership by Race

Tract	White	Black	AIEA	API	Other	All
4052	22.5%	6.4%	n/a	64.0%	0.0%	27.6%
4053	6.4%	2.1%	n/a	17.1%	15.2%	7.5%
4054	19.8%	6.7%	55.6%	22.6%	3.8%	13.7%
4055	23.4%	18.7%	0.0%	33.0%	16.3%	24.2%
4056	25.5%	15.9%	0.0%	37.6%	30.3%	24.8%
4057	36.9%	22.3%	50.0%	45.3%	33.8%	30.1%
4058	57.6%	35.4%	100.0%	38.6%	50.6%	40.6%
4059	43.3%	29.2%	0.0%	27.2%	26.7%	30.0%
4060	15.0%	4.1%	0.0%	18.5%	13.9%	11.4%
4062	23.6%	19.2%	0.0%	18.2%	18.1%	19.2%
4063	48.2%	39.4%	0.0%	52.0%	34.3%	42.3%
4064	58.9%	39.8%	0.0%	52.9%	32.2%	47.5%
District	24.2%	17.8%	16.9%	32.3%	20.9%	23.3%
Oakland	50.5%	35.3%	30.1%	40.8%	30.1%	41.7%

Source: 1990 Census.

Some tracts, such as 4064, have high homeownership for all races, while other tracts have lower rates overall but high homeowner rates for a particular racial group. For example tract 4052 has a 28% homeownership rate in general, but for the 33% of the tract's population that are Asian or Pacific Islanders the homeownership rate is 64%. In spite of this, there are still no tracts where black homeownership rates exceed the white rate. Even in tracts like 4057 where the population is 55% black, whites are more likely to be homeowners.

This data indicates that there may be significant barriers to homeownership which are linked to race through factors such as income and differential access to mortgage loans.

AVAILABILITY

Housing vacancy rates are an indicator of whether the housing market is in balance and can provide a range of choices and prices to those seeking housing. ABAG has set a regional goal of a 4.5% housing vacancy rate; while the City of Oakland believes that a reasonable vacancy rate should be approximately 3.2%.

There were a total of 20,532 occupied housing units in the San Antonio Community Development in 1990. The 1990 Census lists vacancy rates for tracts in the San Antonio District which range from 6.00 to 9.01%, except in census tract 4064 in which the vacancy rate is lower at three percent. The Census puts the citywide vacancy rate at seven percent in 1990. Oakland's 1995 Consolidated Plan, however, explains, the City believes that the actual vacancy rate is much lower than that projected by the Census. The Census-reported vacancy rates includes units which are vacant for sale or rent and other vacant units, including units awaiting occupancy, boarded up or other circumstances. Moreover, some of the units might have suffered damage in the earthquake and therefore are not really available or suitable for occupancy.

Table 2 presents the 1990 Census data for each tract including the number of units vacant for more than 6 months. The Census vacancy rates in most of the San Antonio district are higher than the standards targeted by ABAG and the City. If these rates are accurate it should mean that there is an excess supply of housing units which should mean low rates of overcrowding and lower rents. However other data from the Census, presented below, show that overcrowding and affordability are, in fact, serious problems for the district. Given the fact that there has been a substantial growth in population and that housing supply was not increased at a similar rate, it seems counterintuitive that there would be an excess supply of rental housing in the area.

One explanation could be that the low-income population in the district cannot afford the available housing units and there is a mismatch occurring in the area. On the other hand, the high vacancy rate might be pointing to large scale abandonment of housing units taking place in the district. Table 2 shows the number of units which have been vacant for more than 6 months and the percentage that these units represent of total housing units and of vacant units. It is likely that many of these units are not, in fact, available for lease. If these units are removed from consideration vacancy rates fall considerably; from 7.6% for the district to only 5.4%. The Census also cites 98 units in the district which are boarded up; these units comprise 5.7% of the district's vacant units. In some tracts a far higher percentage of vacant units are boarded up. In tract 4055, 17% of vacant units are boarded up and in tract 4063 20% are. Other tracts have virtually no

boarded up units; tract seven of the districts 12 tracts have less than 5 boarded up units. The district's abandoned units could serve as housing for the many low income residents of San Antonio and their rehabilitation could foster revitalization in those areas where they are concentrated.

Table 2: Vacancy Rate by Tract in 1990

Tract	Housing Units	Occupied	Vacant	Vac. Rate	<u>Vacant More Than 6 Months.</u>		
					Num.	% of Units	% of Vacant
4052	2565	2411	154	6.00%	46	1.8%	29.9%
4053	3190	2923	267	8.37%	76	2.4%	28.5%
4054	2850	2635	215	7.54%	41	1.4%	19.1%
4055	1587	1464	123	7.75%	33	2.1%	26.8%
4056	1458	1335	123	8.44%	43	2.9%	35.0%
4057	1377	1273	104	7.55%	19	1.4%	18.3%
4058	1344	1231	113	8.41%	42	3.1%	37.2%
4059	2041	1892	149	7.30%	60	2.9%	40.3%
4060	1188	1081	107	9.01%	41	3.5%	38.3%
4062	2698	2483	215	7.97%	28	1.0%	13.0%
4063	1232	1136	96	7.79%	43	3.5%	44.8%
4064	690	668	22	3.19%	12	1.7%	54.5%
Total	22220	20532	1688	7.60%	519	2.3%	30.7%

Source: 1990 Census.

AFFORDABILITY

Housing affordability is a serious problem throughout Oakland. HUD classifies a household as rent burdened if they are paying more than 30% of their household income for rent or other housing costs. Citywide, 42% of households spend more than 30% of their income to meet their housing needs in 1990, either in rent or in the costs associated with homeownership. In the San Antonio district the problem is even worse. In the district as a whole, 44% of households are paying more than 30% of their income for housing but in certain census tracts the number rises above 60%. Of course the problem is more acute among renter households. 48% of renters in the district are paying more than 30% of their income for rent while only 29% of owners are similarly burdened. The rent burden is, of course, directly related to income. Households with lower incomes pay

substantially higher portions of their income for rent. 82% of the district's households earning less than \$10,000 pay too much for rent according to HUD's standard, while for those earning between \$10,000 and \$20,000 the figure is still 79%. Table 3 shows that there are dramatic differences between tracts within the district.

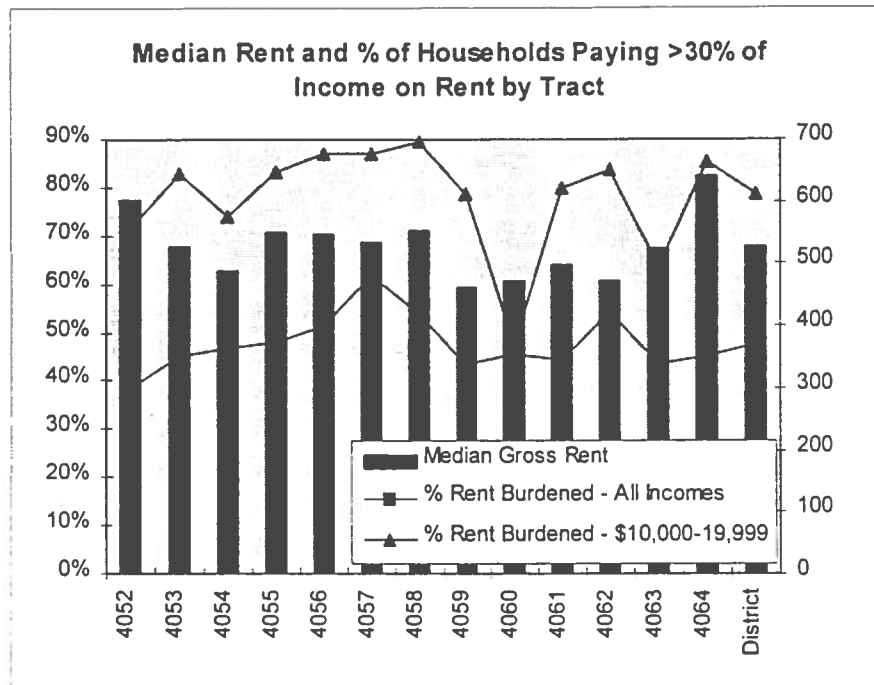
Table 3: Renter Households Paying More than 30% of Income for Rent by Income.

Census Tracts	Income Category					All Incomes
	Less than 10,000	\$10,000-19,999	\$20,000-34,999	\$35,000-49,999	\$50,000 >	
4052	83%	72%	36%	4%	0%	39%
4053	79%	83%	27%	12%	0%	45%
4054	84%	74%	22%	3%	0%	47%
4055	80%	83%	30%	0%	0%	48%
4056	88%	87%	28%	4%	0%	51%
4057	83%	87%	34%	15%	0%	62%
4058	86%	90%	26%	11%	0%	54%
4059	82%	79%	14%	0%	0%	44%
4060	74%	48%	34%	0%	0%	46%
4062	84%	84%	14%	6%	0%	55%
4063	67%	64%	10%	8%	0%	44%
4064	92%	85%	43%	8%	0%	45%
District	82%	79%	26%	5%	0%	48%

Source: 1990 Census.

It is not clear that these differences in the percent of the households that are rent burdened is due to differences in the median rent between tracts. In fact, some of the tracts with the highest median rents have the lowest percentages of households paying greater than 30% of income on rent. Much of this difference is due to differences in the income distribution of the tracts. Tracts with high concentrations of low income residents also have high concentrations of rent burdened households even if the tract median income is low. However, among households with incomes between \$10,000 and \$20,000 the percentage paying more than 30% of income on rent is still not directly related to tract median income. Many tracts have very high percentages of low-income families who are rent burdened in spite of relatively low rents. Figure 6 shows the relationship between median rent and percentage of households which are rent burdened.

Figure 6: Housing Affordability by Tract in the San Antonio District



There is a clear need for additional affordable housing or other approaches to reducing housing costs particularly in areas with high levels of rent burden.

The need for affordable housing is particularly acute among the elderly. 63% of elderly renter households are rent burdened compared with 45% of non-elderly renters. In several tracts more than 80% of elderly renters are paying more than 30% of their income for rent and in two tracts more than 95% are.

Among homeowners, the situation is reversed and the elderly are less likely to have affordability problems perhaps because of low or no mortgage costs. Only 23% of elderly homeowners in the district are paying more than 30% of income for rent while for non-elderly homeowners the figure is 32%.

Table 4: Householders Paying Greater Than 30 Percent of Income for Rent or Owner Costs

	<i>Renters</i>		<i>Owners</i>		<i>All</i>	
	15 to 64	>65	15 to 64	>65	15 to 64	>65
4052	35%	70%	35%	26%	35%	46%
4053	42%	57%	55%	n/a	42%	57%
4054	43%	73%	26%	11%	42%	60%
4055	46%	67%	28%	19%	44%	46%
4056	50%	61%	18%	32%	45%	49%
4057	61%	72%	36%	32%	55%	49%
4058	49%	96%	37%	17%	46%	37%
4059	42%	81%	36%	24%	40%	42%
4060	48%	37%	18%	36%	46%	37%
4062	52%	96%	38%	26%	50%	58%
4063	42%	47%	20%	28%	35%	39%
4064	42%	71%	37%	7%	40%	26%
District	45%	63%	32%	23%	43%	47%
Oakland	47%	60%	34%	23%	43%	40%

Source: 1990 Census.

HOUSING QUALITY

The San Antonio district is one of the oldest neighborhoods in the City, dating back to the late 19th and early 20th centuries. Therefore, the housing stock is considerably older and less expensive than the rest of Oakland, with 41% of the houses in the area built prior to 1939. During the past ten years only 1,502 units have been added to the housing inventory. This represents a minimal increase in housing stock compared to the 21% increase in population experienced in the neighborhood in the past decade.

An older housing stock does not correlate directly with poor quality. To understand the quality issue one must look at specific indicators; the lack of either complete plumbing facilities and complete kitchen facilities identifies housing units which are of substandard quality. Other indicators can be used to gauge at the quality issue, but the census provides these as measures.

For all census tracts in the area, around 196 or less than one percent of the units lack kitchen facilities. This is lower than Oakland's 1.27 percent and one can infer that on average there is no serious quality problem. Census tracts 4059 and 4060 have higher

percentages of units without kitchen facilities, these census tracts are adjacent to the commercial corridors of East 14th Street where higher density development occurs. These percentages might reflect single room occupancy hotels, or some units which were used as commercial property before and are now being used for residential purposes because of population pressures.

Table 5: Kitchen Facilities

<i>Tract</i>	<i>Complete</i>	<i>Incomplete</i>	<i>Total</i>	<i>Complete</i>	<i>Incomplete</i>
4052	2536	29	2565	98.87%	1.13%
4053	3181	9	3190	99.72%	0.28%
4054	2821	29	2850	98.98%	1.02%
4055	1573	14	1587	99.12%	0.88%
4056	1458	0	1458	100.00%	0.00%
4057	1363	14	1377	98.98%	1.02%
4058	1332	12	1344	99.11%	0.89%
4059	1993	48	2041	97.65%	2.35%
4060	1168	20	1188	98.32%	1.68%
4062	2691	7	2698	99.74%	0.26%
4063	1218	14	1232	98.86%	1.14%
4064	690	0	690	100.00%	0.00%
All	22024	196	22220	99.12%	0.88%
Oakland	152766	1971	154737	98.73%	1.27%

Source: 1990 Census.

In regards to plumbing facilities, around 133 or .62 percent of the units lack complete plumbing facilities. Once again on average this figure is lower than Oakland's .79 percent and therefore no serious quality problem is occurring in the area. Census Tracts 4054, 4060 and 4062 fall above Oakland's figure and these are once again concentrated around the commercial corridor on East 14th Street. Census tracts 4057 and 4063 also reflect higher percentages and they are located farther north in the district.

Table 6: Plumbing Facilities

<i>Tract</i>	<i>Complete</i>	<i>Incomplete</i>	<i>Total</i>	<i>Complete</i>	<i>Incomplete</i>
4052	2402	9	2411	99.63%	0.37%
4053	2923	0	2923	100.00%	0.00%
4054	2614	21	2635	99.20%	0.80%
4055	1454	10	1464	99.32%	0.68%
4056	1335	0	1335	100.00%	0.00%
4057	1259	14	1273	98.90%	1.10%
4058	1227	4	1231	99.68%	0.32%
4059	1887	5	1892	99.74%	0.26%
4060	1067	14	1081	98.70%	1.30%
4062	2447	36	2483	98.55%	1.45%
4063	1126	10	1136	99.12%	0.88%
4064	668	0	668	100.00%	0.00%
ALL	21318	133	21451	99.38%	0.62%
Oakland	143383	1138	144521	99.21%	0.79%

Source: 1990 Census.

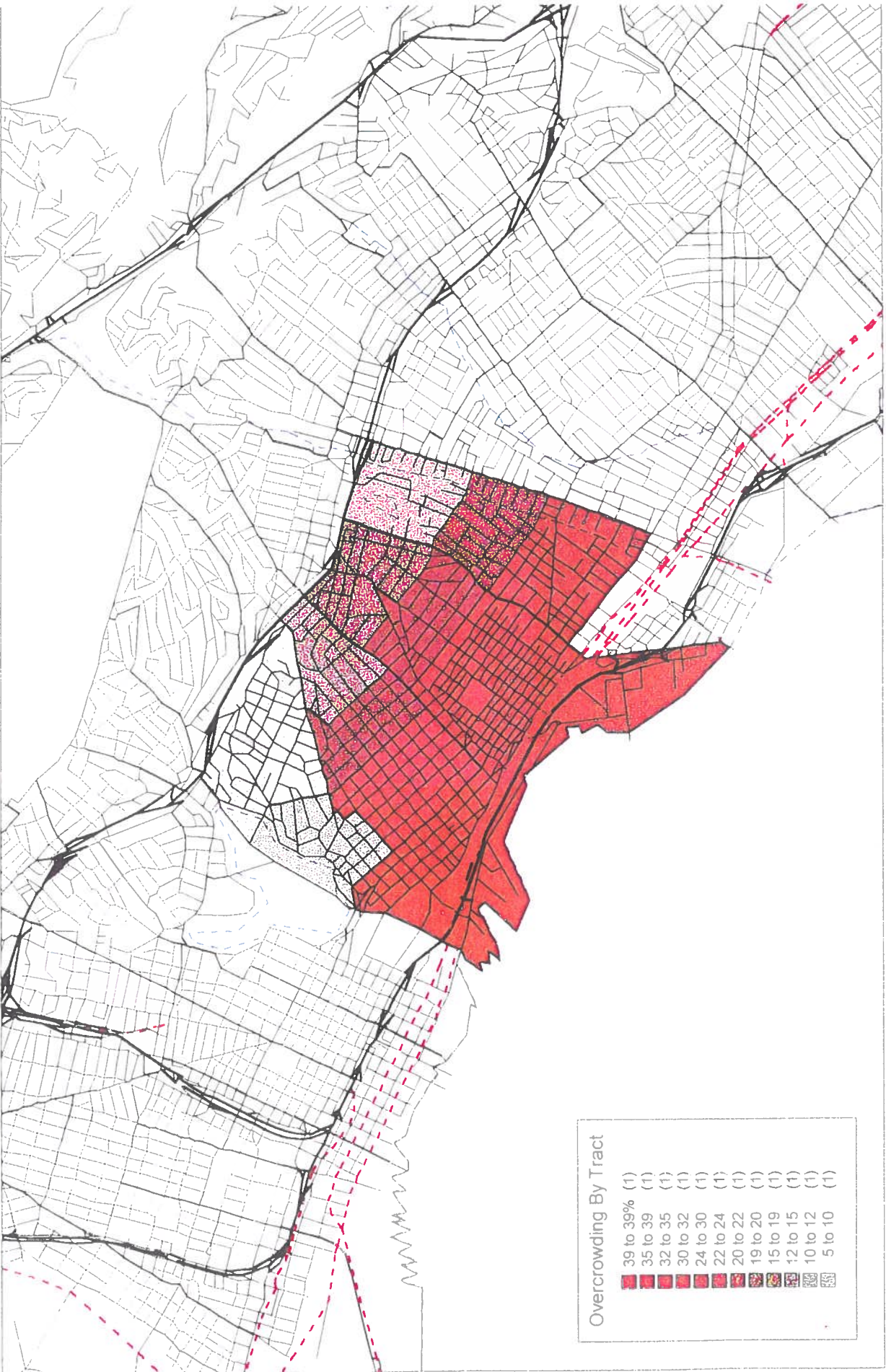
In summary, the San Antonio district does not reflect serious quality problems on average, but the census tracts along the main corridor have higher percentages and should be targeted as places where these quality issues can be identified and addressed.

OVERCROWDING

Overcrowding is a very serious problem which has grown worse in the past decade. Since 1980, increases in rents and home prices have outpaced income growth, so families unable to afford decent homes have tended to double up. Overcrowding is one of the quantitative measures used to identify housing need. A housing structure is said to be overcrowded when the unit contains more than one person per room. Severe overcrowding occurs when a housing unit contains more than 1.50 persons per room.

Overcrowded units as a percent of all rental and ownership units in the district are almost double those found in Oakland with 22.09 % and 11.79% respectively. With the exemption of census tracts 4052 and 4053, all of the other census tracts experienced higher overcrowding figures than those of the City. Map 2 illustrates the spatial distribution of overcrowding.

Overcrowded Units as a Percent of Total Housing Units



In the tracts adjacent to Lake Merritt between 5% and 10% of housing units are overcrowded while the tracts along the East 14th Street corridor face overcrowding of as high as 40% of the housing units.

In the rental housing stock, 8.4% of the units are overcrowded, while 16% are severely overcrowded. These percentages are higher than Oakland's in which 6.5% of the units are overcrowded and 9.2% severely overcrowded. Table 7 lists overcrowding and severe overcrowding by tract. The most serious problem is found in the NCR census tracts 4054, 4059, 4060 and 4062. These areas suffer from even higher overcrowding problems which range from 32 to 43%. The Asian Pacific Islander population is concentrated in these census tracts and families with many children is the reason why there are larger households here. At the same time, because this population has recently arrived in the United States, many have barriers that impede them from getting decent jobs. The lack of income may be the cause for these families living in overcrowded situations.

Table 7: Overcrowded Units as a % of Total Rental Units

Tracts	<i>Persons/BR</i>		Total
	1.01 to 1.5	1.51 or more	
4052	2%	1%	3%
4053	3%	7%	10%
4054	10%	22%	32%
4055	10%	15%	25%
4056	4%	14%	18%
4057	8%	11%	19%
4058	9%	23%	32%
4059	17%	21%	38%
4060	10%	22%	32%
4062	13%	30%	43%
4063	8%	13%	20%
4064	12%	6%	18%
Total	8%	16%	24%
Oakland	6%	9%	16%

Source: 1990 Census.

In comparison to the rental housing stock, overcrowding in the homeownership units is not as severe. In the owner housing stock, six percent of the units are overcrowded, while nine percent are severely overcrowded. If these homeownership figures are compared with Oakland, the San Antonio district still suffers from higher overcrowding problems. Oakland faces a smaller three percent for both overcrowded and severely overcrowded units. Table 8 shows that census tracts 4052, 4059, 4060 and 4062 experience the worst problems with severely overcrowded units ranging from 12 to 17%.

Table 8: Overcrowded Units as a % of Total Owner Units

Tracts	<i>Persons/BR</i>		Total
	1.01 to 1.5	1.51 or more	
4052	8%	5%	12%
4053	5%	6%	11%
4054	3%	10%	13%
4055	7%	7%	14%
4056	5%	3%	8%
4057	7%	10%	17%
4058	6%	6%	12%
4059	10%	17%	27%
4060	12%	15%	28%
4062	8%	12%	20%
4063	6%	13%	19%
4064	3%	2%	6%
Total	7%	9%	16%
Oakland	3%	3%	6%

Source: 1990 Census.

V. NEIGHBORHOOD COMMERCIAL REVITALIZATION ISSUES

Community Organizing

San Antonio is fortunate to have many groups and organizations working towards the enrichment of the neighborhood. Many of these organizations have been working in the community for years and are a source of pride for many residents. In this community one can find churches, youth organizations, senior centers, merchant associations, neighborhood home alert groups, crime fighting associations, a historic preservation group and several non-profit housing developers. All of these procure their own funding, organize activities and mobilize their constituencies towards specific goals. However, throughout the years these organizations have worked independently without connecting in a systematic way with the work of others in the community. Recently a group of them have formed the Neighborhood Planning Council with the purpose of directing and coordinating their work towards a common vision.

They are tired of being reactive instead of proactive about the things happening around them. The coalition of groups and individuals realize that the impact of their efforts are sometimes diluted because they operate independently and lack of communication between the institutions causes inefficiency. For example, some non-profits in the area end up engaging in similar activities. Oakland Community Organizations, People United for a Better Oakland, San Antonio Community Development Corporation and the East Lake Merchants Association all deal with safety issues in the community. They independently deal with the police department and have different views of what, when and how safety should be created. The establishment of a body that reduces fragmentation of their work and improves communication is seen as an asset.

Duplication of efforts not only takes place at the neighborhood level, but also at the government level. Parallel processes which involve the community and its leaders come forth from different government agencies. As an example, the NCR Program carries out community planning while the Enhanced Enterprise Community has community building teams doing outreach in the community to find out about issues and

needs in the community. Both are trying to work toward economic development, but there is little communication and coordination among their efforts.

The process of groups coming together is exciting, but community organizing in San Antonio is a daunting task. Getting people to participate in a planning process is extremely difficult. In the case of San Antonio it is compounded by the fact that organizing must take place in a multi-ethnic and multi-lingual community. Furthermore, as mentioned before, many of the residents are foreign born and unfamiliar with their new environment. Their voices and opinions go unheard and many are isolated because of language and cultural barriers. Many worlds co-exist in San Antonio.

The most serious problem facing this community is that the majority of its population is politically underrepresented. The immigrant population is unfamiliar with the political systems of the United States. Many have never even participated in such a complex political process or have never had the opportunity or time to sit in a room and plan out what they want their “community” to be. Cultural traditions also affect participation among immigrants because many do not envision how their concerns can be channeled through city government. For example, cultural Buddhist belief is to respect authority, not change it. Furthermore, memories of untrustworthy and oppressive government structures make them not quick to participate in local government affairs. At the same time, they share a self-help tradition which was necessary for survival in their countries which often lacked a participatory government structure.

As in every neighborhood, some voices are heard while others remain silent; many groups choose to live and accept the consequences of the proactive minorities’ actions. Decisions are made just by people that receive information, process and react to the decision being considered by the city or other actors.

PRINCIPLES ESPOUSED BY THE NEIGHBORHOOD PLANNING COUNCIL(NPC)

Since December of 1994 the NPC has been convening on a monthly basis to discuss their views about the future of their neighborhood. They have agreed on various beliefs that will guide their work:

- The NPC is an inclusive group which will have representation from everyone in the lower San Antonio neighborhood such as residents (younger people, elders, renters and homeowners), merchants, representatives from non-profit agencies, institutions and schools.
- The NPC is representative of the area's diverse population, interests and lifestyles. As an example, to facilitate communication among ethnic groups, translators will be utilized for Spanish, Chinese, Vietnamese and other groups.
- The NPC is steered by community leaders representing a wider constituency based in the community.
- The NPC recognizes that the most important resource of any neighborhood are the people that live there and therefore the planning process and action steps will include them as actors in the revitalization of their community.
- The group will arrive at decisions through consensus building.
- The meetings will be facilitated by an outside consultant. By bringing someone from the outside, everybody can participate and share their opinion freely.
- It will focus on long-term strategies, but also on short-term victories that can bring people to work together towards one goal.
- It will not become just another organization, but it will be a group that can connect on a regular basis and coordinate action. The NPC serves as a clearing house for planning, action, information and communication among community groups.
- It will bridge understanding between different groups and individuals. To understand the work of others the meetings are rotated and held in different community facilities and organizations.
- Its opinions and work will be transmitted to the City government officials so they can influence City wide planning processes and implementation programs.
- Issues will be discussed and consensus reached on different topics, but the actual work and emerging opportunities will be grasped and carried out by specialized or interested organizations. An example is the beautification of East 14th Street. ELMA

was the lead group organizing the Earth Day event, while other people participated in the activity.

- It hopes to bring together all the organizations and people already working in lower San Antonio to coordinate their efforts toward change in the community. If an organization or group chooses not to participate, the planning team provides on-going information about the process and outcomes by sending informational updates and by visiting institutions and people.

THE NEIGHBORHOOD PLANNING COUNCIL

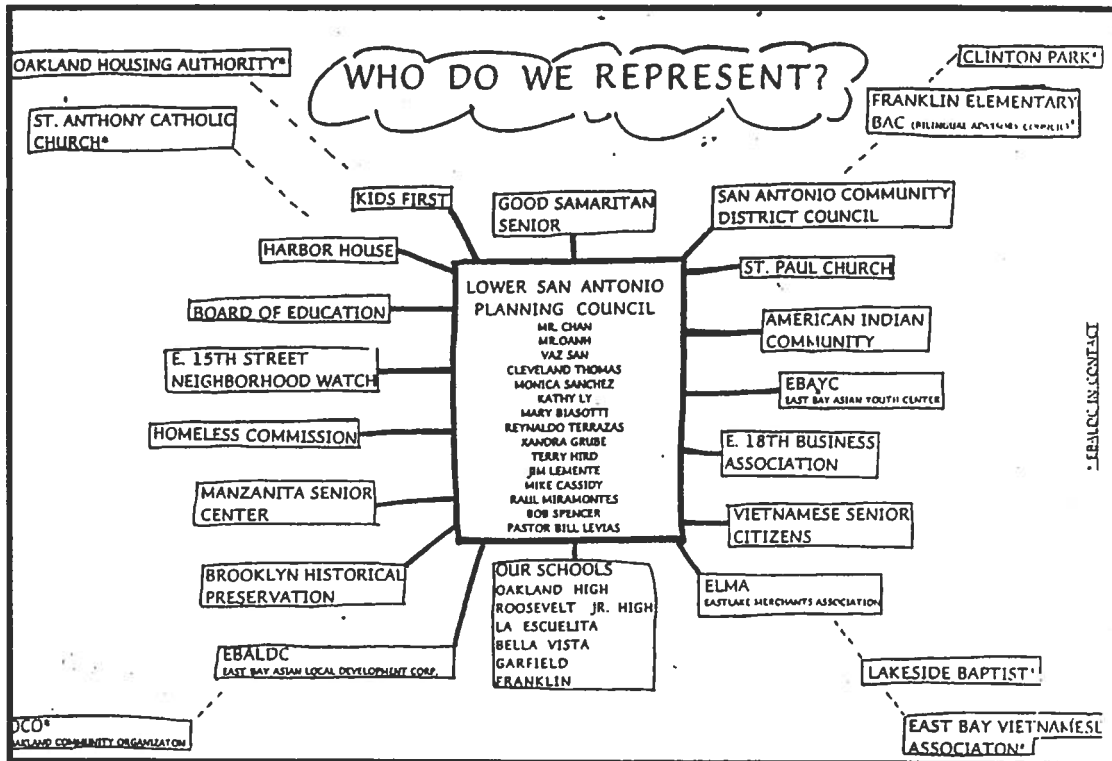
An important piece of this effort are the leaders that shape and move the process. The following section describes who is on the Neighborhood Planning Council and who they represent in terms of the wider community.

- Mary Biasotti- Director of Economic Development, Harbor House. She has been involved in creating opportunities for residents interested in obtaining the necessary capital to start their own business.
- Raul Miramontes- Co-owner of the Miramontes Bakery, an important supermarket for the Latino community. He is a member of the East Lake Merchants Association (ELMA).
- Vaz San- A Cambodian student at Roosevelt High School. He lives with his family who rent an apartment in the district. He is President of his class and active in creating the City-wide Children's Trust Fund in Oakland through his work at East Bay Asian Youth Center (EBAYC).
- Robert Spencer- Member of District Board of the Oakland Unified School District (OUSD). He is an urban economist interested in how schools can participate more actively in neighborhood revitalization efforts.
- Cleveland Thomas- An African-American senior who has lived in Oakland since 1952 and has been a long-standing leader in the community. He is the Executive Director of the Good Samaritan Senior Center and chair of the San Antonio Community District Board, responsible for allocating CDBG funding.

- Terry Bird- Owner and president of a large shipping supply company located in the East 14th Street commercial corridor. He believes that although his company is not neighborhood serving it is still part of what goes on in San Antonio.
- Mr. Dak Yu Chan- Chinese senior residing in an apartment located in the area. As a resident and advocate for immigrant elders rights he is worried about the expiration of Section 8 vouchers in his building and what will happen to the older renters when this occurs.
- Mr. Oahn Pham- Born in Vietnam in 1932, he is a retired math teacher who currently studies English at Laney College. He rents a house in the district and is the founder and active member of the East 15th Street Neighborhood Watch Group.
- Xandra Grube- Senior planner for the City of Berkeley, has lived in San Antonio since 1979. A homeowner who advocates for historic preservation in the community, she worries about the impact of growth in this community in relation to services and schools. She is a member of the Brooklyn Preservation Group and a member of the Oakland General Plan Congress.
- Jim Lemente- Retired Native American senior who has been a leader in the Native American community in Oakland and the East Bay. Past executive director of the Intertribal Friendship House located on the commercial corridor in San Antonio. He also serves on the Oakland Homeless Commission.
- Monica Sanchez- Mexican/Native American student at Oakland High-School. Her parents own a house in San Antonio.
- Kathy Ly- A Chinese American student attending Oakland High. She is part of the organizing team at EBAYC.
- Mike Cassidy- East Bay Asian Local Development Corporation (EBALDC) board member, he works as a planner in the Oakland Office of Health and Human Services.

Figure 7 delineates the Neighborhood Planning Council and who they represent:

Figure 7: The Neighborhood Planning Council and Member Organizations



PROCESS AND ACTION

The NPC believes that the process through which the plan is developed is important in reflecting their values. At the same time, they believe the community needs to be involved and that the NPC should involve the community in the process. The meetings have been scheduled for the entire year and the process reflects some of the principles stated previously. Figure 8 is a calendar which shows the schedule of the meetings and illustrates three spheres of work in which the NPC will engage throughout this year.

Figure 8: Calendar of Neighborhood Planning Council Meetings in 1996

NEIGHBORHOOD PLANNING COUNCIL CALENDAR											
QUARTER 1			QUARTER 2			QUARTER 3			QUARTER 4		
DEC. 95	JAN. 96	FEB. 96	MAR. 96	APR. 96	MAY 96	JUN. 96	JUL. 96	AUG. 96	SEPT. 96	OCT. 96	NOV. 96
mtg 1	mtg 2	mtg 3	mtg 4	mtg 5	mtg 6	mtg 7	mtg 8	mtg 9	mtg 10	mtg 11	mtg 12
Define vision Identify neighborhood Issues Decide on planning calendar Create group Identity			Goal Setting Define objectives			Develop Action steps			Finalize Action Plan Finalize Technical Reports		
NEIGHBORHOOD MEETING			NEIGHBORHOOD MEETING			NEIGHBORHOOD MEETING			NEIGHBORHOOD MEETING		
			General Plan FAIR 3/30/96 (City-wide Land Use Map)			General Plan COMMUNITY WORKSHOP Jun-96 (Draft of Land Use/Transportation Element)			General Plan Draft submit to Planning Commission & City Council		

- The first area of work will concentrate more on the NPC coming together as a group, defining issues, getting to know each others' work, creating a group identity and developing the Neighborhood Plan. This plan will delineate their vision, values, goal and objectives, action plan and will include four technical reports on important issues concerning youth development, housing development, economic development and land use in the community. The research for these issues have been carried out by EBALDC and NCR staff.
- The second level of work will include outreach to the community. There will be two community wide meetings where all neighborhood residents will be invited to make sure that the NCP is moving in accordance to the ideas of the community. These meetings will be carried out in the district and information about the work will be disseminated throughout the community in different languages (Chinese, Vietnamese, Spanish and English). Also, through the NPC members, larger constituencies will be approached to get a sense of their opinions about the issues. Finally, other organizations will be informed through meetings with their members.
- Finally, the NPC will find out about City wide processes and connect with these to present their opinions and make sure policy makers understand where they stand on specific issues and programs. They will influence how these policies are implemented at the neighborhood level. Some of the strategies might include meeting with City Council members, in this case Ignacio de la Fuente and John Russo, to

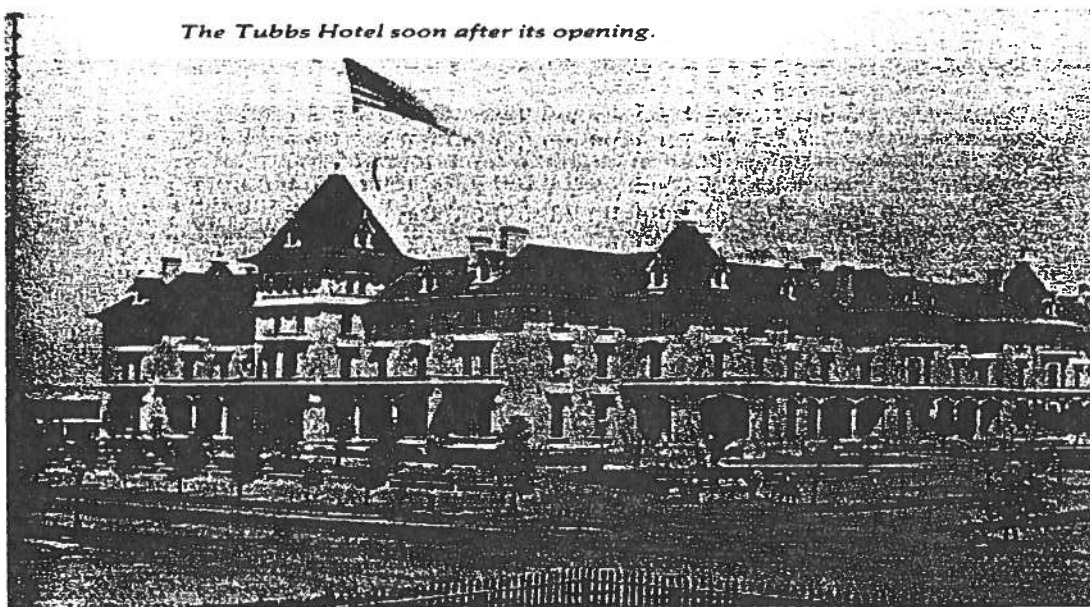
inform them about their efforts and priorities. Council members will attend general plan meetings during the year to make sure the plan incorporates their concerns and ideas and will work with OUSD to voice their ideas and concerns about the reconfiguration of the schools.

Economic Development

COMMERCIAL HISTORY

Historically, the East 14th and East 12th Street corridors served as an important commercial throughfares in the City of Oakland. In the mid-1870s the area was considered a luxurious suburb and the Tubbs Hotel, a prestigious inn, was located in the commercial area. See Figure 9. The hotel's grounds extended from 4th to 5th Avenues

Figure 9: The Tubbs Hotel in San Antonio, 1870s.



Source: From Beir Bagwell, *Oakland: The Story of a City*, 1924

between East 12th and East 14th Street and brought visitors from the East Bay and San Francisco. During the first half of the 20th century the area came alive as a vibrant and bustling center. However, after the wars and continuing into the 1960s and 70s, the commercial district lost much of its economic vitality due to the out-migration of the middle class to the suburbs and the loss of important jobs with the closure of many of the

shipyards. The construction of the Nimitz freeway (I-880) to the west and I-580 to the east further isolated the area from travellers commuting through the East Bay. Further economic disinvestment continued when several banks closed their branches, the Oakland Hospital closed and Montgomery Ward pulled out of the area in 1982, leaving a warehouse with approximately 1 million square feet of vacant commercial space. Several proposals to redevelop this site have been unsuccessful and the process of arranging for demolition of Ward's building is underway.

Starting in the mid-eighties a large number of Southeast Asians began settling in San Antonio. Federal relocation programs had dispersed Southeast Asian refugees throughout the United States, but years later the scattered population began concentrating in areas where the climate was more hospitable and Asian goods were easily obtainable.⁴ Oakland's Chinatown attracted many of the immigrant population, but overcrowding and higher rents pushed people elsewhere. San Antonio, located below Chinatown, was a natural place to absorb the spillover. The concentration of Southeast Asians in the district provided a specific market niche for small businesses to occupy.⁵ Small ventures which tended to the needs of the immediate neighborhood began and continue to settle along the East 14th Street and E12 Street corridor. The new businesses are an asset to this community, as they have been essential in revitalizing and improving the image of the area.

Presently, the uses along these streets are mostly commercial, industrial, mixed use and residential. Current zoning regulations have been in place for more than 30 years and therefore do not reflect the changes that have transformed the area. As a result, the strip is home to a haphazard mix of businesses and homes; light manufacturing businesses sit next to once-grand Victorian residences.⁶

⁴ Lee, Mi Yeong. Southeast Asian Small Businesses and Community Economic Development, p.1

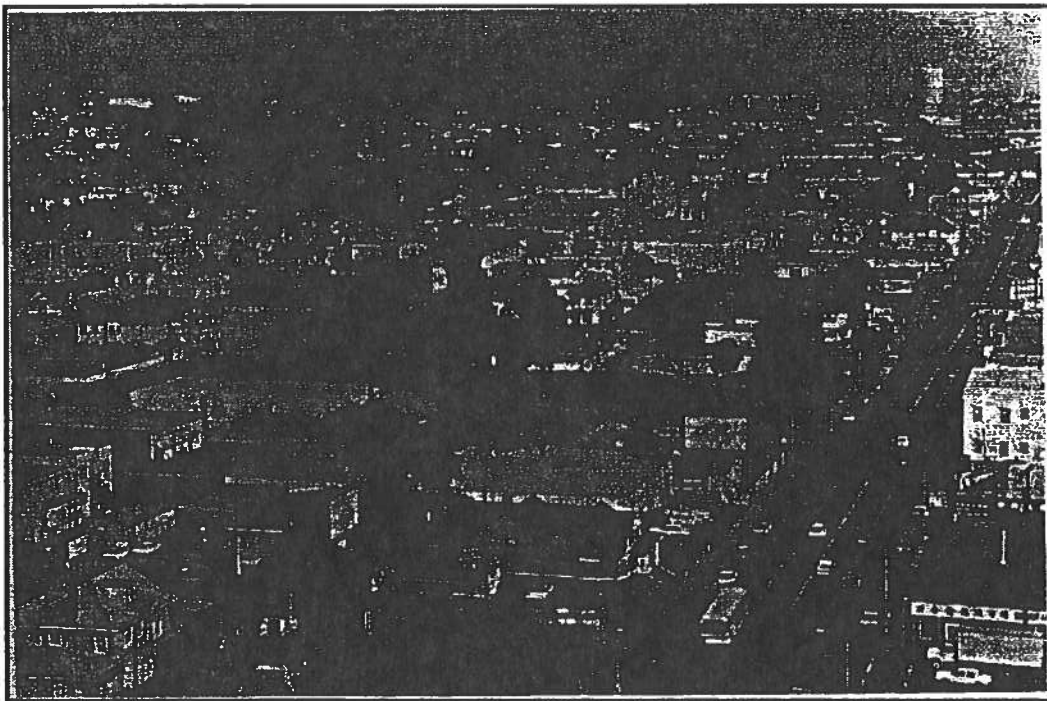
⁵ Ibid. p, 3.

⁶ Coro Foundation Report, Dialogue and Development in San Antonio, p.8

COMMERCIAL STRUCTURE

The commercial activity is centered along East 14th and East 12th Streets. These corridors run across the entire San Antonio District from 1st to 28th Avenues. The area has a total of 551 businesses. In recent years, the commercial area has seen an upsurge in small neighborhood serving businesses, particularly Asian owned groceries, video stores, travel agencies and restaurants which cater to the tastes and lifestyles of the new immigrants. At the same time, some Latino businesses dot the locale, but are usually concentrated further down on East 14th Street near the Fruitvale district. Figure 10 shows an aerial view of the commercial corridor.

Figure 10: View of East 12th Street and Clinton Park



If compared to other business districts around Oakland the business corridor is performing fairly well in terms of sales. A comparison of third quarter sales from 1994 to 1995 demonstrate the area has increased sales by 5.6 percent in the past year. The business district generates more sales than the Montclair business district in the Oakland Hills and Lakeshore Avenue near Lake Merritt. However, average sales per square feet

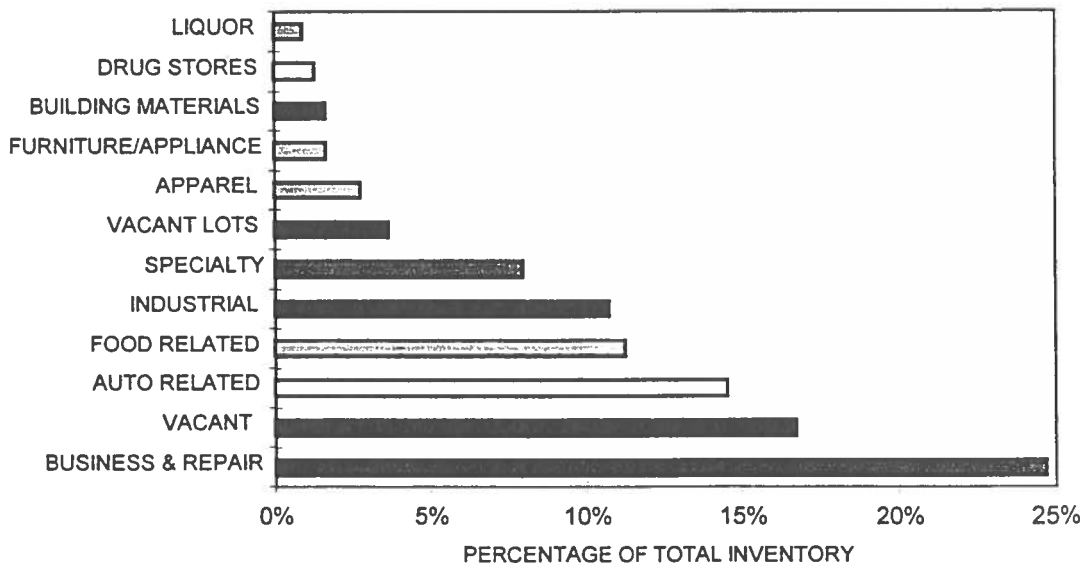
figures are much lower in the San Antonio District due to the greater number of businesses.

Another comparison can be made with the adjacent business district of Fruitvale. This competing neighborhood center captures 27% more sales revenues than San Antonio with almost half the number of stores. Likewise, the Fruitvale sales from the third quarter of 1994 to 1995 have increased by 32%, meaning that Fruitvale is outpacing the San Antonio District in growth in sales. This is not surprising because the Fruitvale community has better access from the highway and is in close proximity to a BART stop which attracts more people from around the region. It has been very active in promoting the stop as a shopping destination and has been able to capture the Latino marketshare which accounts for the majority of the district residents.

New businesses have settled in San Antonio to take advantage of lower rents relative to other districts in Oakland. Compared to Chinatown in Downtown Oakland, San Antonio rents are approximately a fifth lower. Rents are comparable with the Fruitvale district near San Antonio which range from .30 cents to \$1.30 per square foot. Another positive attribute of the area is the abundance of on-street parking.

Figure 11 presents the percentage breakdown by retail category for the entire

Figure 11: Inventory of Commercial Corridor by Retail Type



Source: NCR Commercial Space Inventory, 1995

commercial corridor. The largest percentage of outlets (25%) fall under the business and repair category. Other predominant businesses include auto-related uses (15%), industrial facilities (11%), food related outlets (11%) and specialty stores (8%). To understand what is really happening in the area and where the business activity is concentrated, it is useful to subdivide the commercial corridor, which includes 54 blocks into smaller subsections.⁷ The business activity of the areas in the lower part of East 14th Street are different from those ones found from 15th Avenue up to 24th Avenue. A good example of this is the difference in the vacancy rate. For the entire corridor the vacancy rate is 17%, but if one looks more closely at the location of vacant storefronts the story is slightly different. The vacancy rate for the first subarea, which covers East 14th Street from 1st to 14th Ave, is only 13%. The second subarea which encompasses East 14th and 12th Street from 15th to 23rd Avenues has double the amount of vacant storefronts. Finally, the last subarea of the corridor which covers East 14th and 12th Streets from 24th to 28th Avenues, has the lowest vacancy rate at 8%. Map 3, shows the vacancy rate in the commercial corridor.

⁷ For a detail business inventory by subarea, see Appendix B.

Map 3: Vacant Storefronts on East 14th and East 12th Street



San Antonio

Subarea 1: East 14th and E12th Street from 1st to 14th Avenues

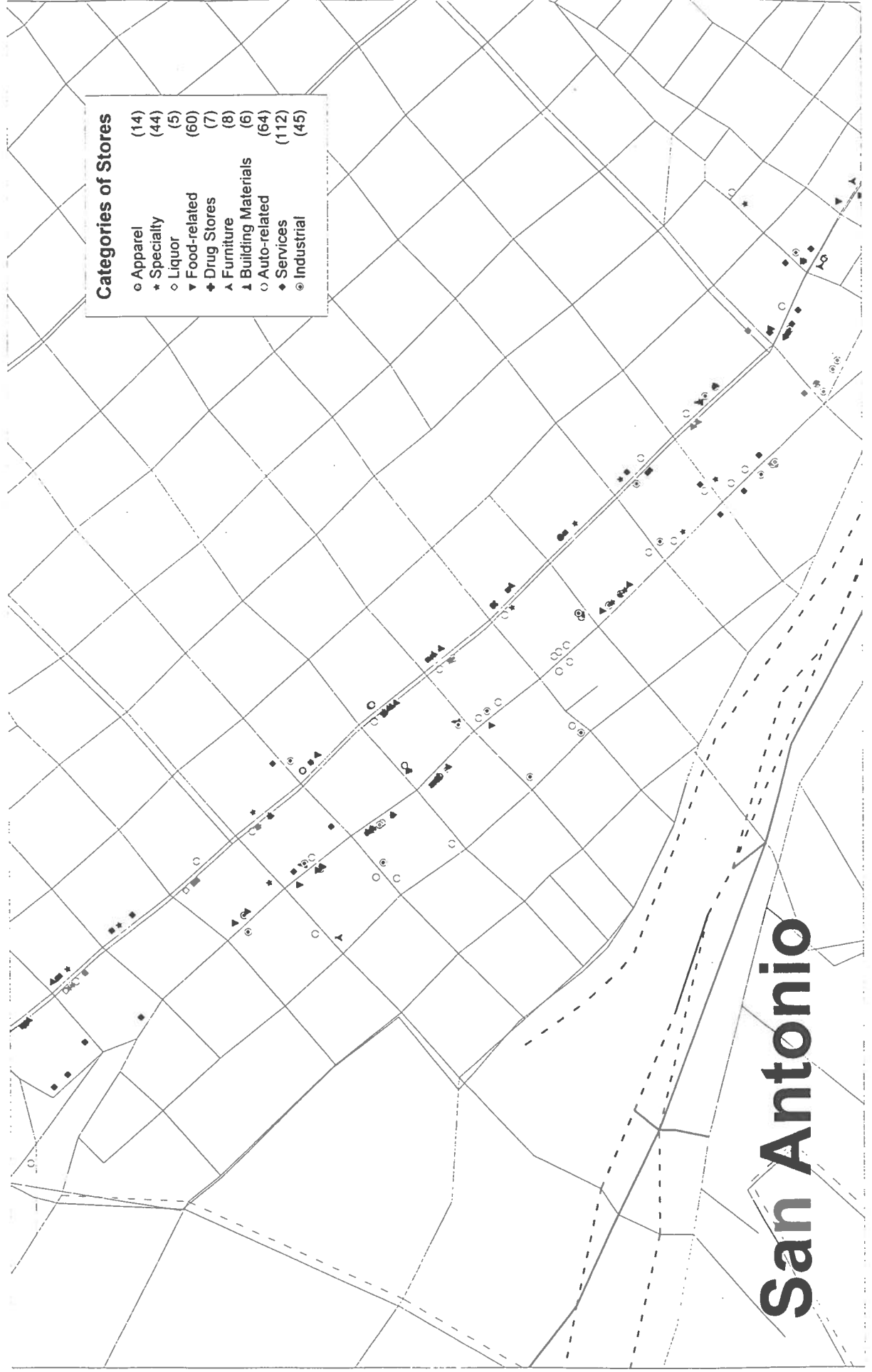
This subarea of the commercial corridor is where one can find most of the business activity. On a typical day, one can see many pedestrians and high traffic volume around the different stores in the adjoining blocks surrounding Clinton Park. The retail frontage is double-loaded and clusters between the 5th and 7th Avenue blocks. The retail activity include travel agencies, beauty salons, cleaners and different professional services like real estate, medical, law and insurance offices, which account for 26% of the total businesses. Other types of neighborhood oriented businesses are specialty stores which comprise 12% of the business inventory and are primarily located on East 14th Street. These include video rental stores, fabric stores, medicinal herbs, incense and others.

Sixteen percent of the businesses in the area are auto-related. The bulk of these businesses concentrate on the East 12th Street corridor, but some are located on East 14th Street. These businesses not only cater to the surrounding community, but have a regional draw.

Another type of store that attracts people to the area are the ethnic food markets and restaurants. Thirteen percent of the present businesses are food-related. The majority of these businesses are concentrated within 4th and 9th Avenues and are owned by Vietnamese, Cambodian, Laotian, Thai and Mexicans.

The vacancy rate in this subarea is around 13 %. Vacancies in the area are located at different sites along the corridors, but when they occur they tend to cluster. On East 14th Street there are a few vacant storefronts between 1st and 3rd Avenues and once again around 12th and 14th Avenues, specifically in a small shopping center located at the intersection of East 14th Street and 14th Avenue. See Map 4 in following page.

Map 4: Subarea 1- East 14th and East 12th Street from 1st to 14th Avenues



Subarea 2: East 14th and E12th Street from 15th to 23rd Avenues

The second subarea presents a different story. After 15th Avenue things begin to change, the amount of storefronts decrease to a total of 176 businesses and the area looks more unkempt. The East 12th Street corridor is dominated by auto-related and industrial uses, while the East 14th Street corridor has many vacant storefronts. The most salient trend in this area is the abundance of vacant storefronts which account for 32% of the businesses. Other outlets include 16% of auto related shops, 15% industrial facilities and nine percent food related restaurants or markets. In this area there is a higher concentration of Hispanic businesses like the Miramontes Bakery, Jalisco Restaurant, Los Tres Amigos and Los Paisanos among others.

The area around 23rd Avenue is a problem for the community because it is the focus of drug and prostitution activities in the neighborhood. Residents in the community have different opinions about the situation. One person stated, "If San Antonio is going to overcome the bad rap it gets from the outside, it has to begin by taking care of its own. Once the community gets cleaned up, people will begin to feel more comfortable and safe and eventually some will move in, set up businesses or at least shop more often in the area."⁸

Subarea 3: East 14th and E12th Street from 24th to 28th Avenues

The third subarea has been the focus of development efforts by the San Antonio Community Development Corporation in the past decade. Recent developments on East 14th Street include the Drasnin Manor and the Sungate Terrace apartments. Both are mixed-use developments which have improved the appearance of this section of the commercial corridor. The commercial space in both projects was difficult to fill, but are fully occupied at the moment. The new San Antonio Marketplace located on the first floor of Sungate Terrace has a variety of retail shops such as jewelery, clothing and specialty stores. The sole tenant at Drasnin Manor is a Vietnamese restaurant which offers karaoke for entertainment and attracts a young crowd. Other businesses in the area

⁸ Coro Fellows Report, p.19

are the AC Indoor Mall which offers general merchandise at a modest price, Standard Brand Paints which is one of the only hardware stores in the area and various fast-food establishments that attract customers from a wider region. There are a total of 84 businesses and the vacancy rate is eight percent in this subarea.

Business Trends

In March of 1990, the Oakland Forum conducted a business inventory surveying retail services located in these corridors. By comparing the same sites over time an analysis of the trends is possible. Of the 176 businesses which were open in 1990 half had closed by 1995. Some of the businesses moved and changed owners, but kept operating under the same type of uses, were converted to other uses, or remained as vacant storefronts. Although the turnover rate is high, half of the businesses open in 1990 are still operating and are therefore stable commercial ventures in the neighborhood. These stores should be targeted for capital and technical support.

In general, there was a slight decrease in auto-related outlets and industrial facilities, while specialty stores grew slightly.

INSTITUTIONAL CAPACITY

The East Lake Merchants Association

The East Lake Merchants Association, a membership organization established in October 1994, is working to create a clean, safe, prosperous community and business neighborhood for the diverse population of San Antonio. The association has grown rapidly since its inception and as of February of 1996 had a membership roster of forty-eight merchants from the different type of stores in the Neighborhood Commercial Area. Presently, 63% of the member merchants are Asian, 15% White, 13% Hispanic, six percent African American and four percent represent businesses owned by people of other ethnicities.

In its first year, the East Lake Merchants worked hard to solidify its membership base by performing membership drives throughout the year. In addition, they have been

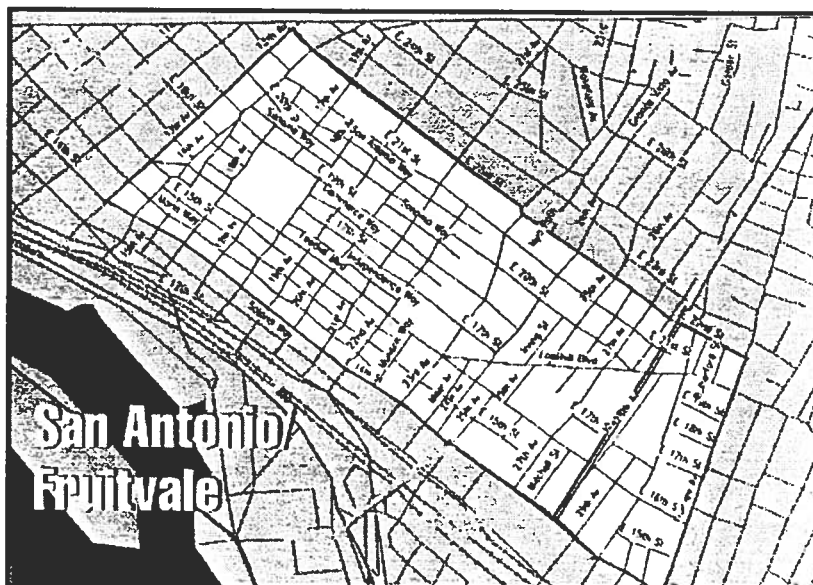
able to establish short and long-term goals to further the revitalization of their business district. Some of the achievements of this past year include, procuring an NCR Area coordinator and a Team Oakland group for the Eastlake area, conducting monthly meetings, organizing a Street Cleaning Event and creating an identity for themselves through meetings and activities with business owners, other merchant groups and city officials.

In the upcoming year, the East Lake Merchant Association will continue to build their membership base and start their beautification program by installing multi-lingual signage identifying the business district, placing banners along the East 14th and E12 Street and planting trees at Clinton Park and throughout the corridor with the assistance of the NCR Program. The association will conduct a merchant survey to better gauge the needs of the businesses in the area and to understand how the merchants would like to participate actively in the revitalization process. Finally, the Office of Public Works will repave East 14th Street and improve lighting.

Enhanced Enterprise Community (EEC)

On December of 1994, Oakland received an “Enhanced Enterprise Community” designation by the Federal Government. Three areas were chosen to receive additional funds to encourage comprehensive and creative initiatives in the most distressed areas of the community. Two tracts, 4059 and 4062, in the San Antonio District make up one of Oakland’s three EEC areas. See Figure 12. Specifically, Oakland

Figure 12: San Antonio/Fruitvale Enhanced Enterprise Community



will receive \$22 million dollars in additional loan authority under the HUD Section 108 Loan Program, a corresponding grant of \$22 million of HUD Economic Development Initiative Funds and additional resources from the Small Business Administration. The City of Oakland has allocated these resources into three major initiatives: the creation of a Community Development Financial Institution (CDFI), the investment in “Flagship projects” and the creation of one-stop capital shop.

The EEC proposal includes Community Building Teams made up of targeted area residents. The teams’ main purpose is to improve the channels of communication between the City and EEC residents. Recently, the NCR area coordinator, members of the Neighborhood Planning Council and representatives of the Community Building Teams met to understand each others roles and improve coordination among planned activities.

The business community will be able to use these additional resources provided to them through the EEC to further their revitalization efforts and increase the institutional capacity of the existing small businesses in the area. For more detailed information on the EEC programs see Appendix D.

Neighborhood Commercial Revitalization Program

The mission of the Neighborhood Commercial Revitalization Program is to develop and implement revitalization strategies for targeted commercial areas in the City’s neighborhoods. The program focuses on creating partnerships between stakeholders in the community to accomplish the physical and economic revitalization of the commercial district. The following list includes some of the resources that the program can offer towards this process:

- **Planning and Technical Studies:** The planning process includes preparation of technical studies and reports by staff and consultants to assist community groups in defining issues and priorities.
- **Merchant Association Assistance:** Assistance to merchant groups in targeted areas to organize, establish goals and implement improvement efforts.

- **Program Development:** The NCR staff assists in procuring funding and implementing programs in the NCR areas.
- **Area Marketing and Promotion:** Assistance is provided to merchant groups interested in joint advertising, directories and newsletter preparation.
- **Physical Improvements:** Physical Improvement projects are coordinated in conjunction with community groups and relevant City departments. Such improvements include area signage programs, blight abatement, and facade improvement programs.
- **Business/Developer Assistance:** NCR staff provides information and referrals about available sites and city programs to existing merchants, potential businesses, and non-profit and private developers. The program promotes development opportunities in NCR areas.
- **Inter-Departmental Coordination of City Services:** The NCR staff identifies and brings together representatives of City Departments to enhance city services and deal with specific issues in each NCR area. Issues areas typically include Lighting, Code Enforcement, Street Maintenance, Crime Prevention and Police Services and Traffic Circulation.

MARKET ANALYSIS AND POTENTIAL

The purpose of the market analysis is to understand the retail business development opportunities available in the commercial district after the construction of various mixed-use development projects on East 14th Street. The following analysis will estimate existing purchasing power of the residents in the market area, compare expenditure potential with existing retail sales and assess potential growth by retail category based on how much more in sales the area can potentially capture.

Trade Area Definition

A trade area for a retail shopping center is defined as the geographic area from which the majority of customers are drawn. Its boundaries can be affected by such factors as geography, physical features, access, competition and the character of the retail

area. The area of study can be defined as a neighborhood-serving retail center because it caters to the daily needs of the immediate neighborhood with the exemption of the auto-related businesses which draw a regional customer base. The potential primary trade area for East 14th and East 12th Streets is defined by a number of man-made and natural features: this trade area is bounded by I-580 to the east, Lake Merritt to the North, 880 to the West and Fruitvale Avenue to the south.

In 1990, the University-Oakland Metropolitan Forum conducted a license plate survey within different points of the study area to determinate where customers originate.⁹ The results of the license plate survey indicated that the section of East 14th Street, which includes the area between 5th to 14th Avenue, draws 75% of its customers from the San Antonio neighborhood. The upper half of East 14th Street draws 50% of its customers from the immediate neighborhood with the exception of the E14th Street and 25th Avenue intersection which draws 60% of its customers from the large vicinity. In 1990, the intersection was the location of the Star Market and is presently occupied by the AC Indoor Mall and two affordable housing development projects with commercial space at ground floor.

Competition from other neighborhood serving retail centers also limits the boundaries of this potential trade area. On the northeast side of the primary trade area, the Lakeshore Avenue offers an attractive setting along the shore of Lake Merritt. Here residents can find banks, a bakery, a Walgreen's and Lucky's. The license plate survey, which also looked at competing centers, found that 47% of Lucky's customers came from the San Antonio District.¹⁰ To the south of the commercial area, Fruitvale acts as another competitor to San Antonio. 31% of Fruitvale customers come from the San Antonio District.¹¹

Thus, in this analysis, the primary trade area is defined as the area within a mile radius from the commercial core, at the intersection of East 14th Street and 14th Avenue,

⁹ Anibal Hernandez Santana, A Market Study to Support Neighborhood Commercial Revitalization in the San Antonio Community Development District., p. 9.

¹⁰ Ibid. p, 9.

¹¹ Ibid. p, 9.

which serves as an important access point to the commercial corridor. The primary trade area represents the closer-in area where the majority of the district market support, or shoppers, are concentrated and it is estimated to typically capture 60% to 80% of a commercial area's total sales. The secondary trade area is defined as the area within a two mile radius from the commercial core. The commercial district draws fewer shoppers from this area. The secondary trade area is said to account for approximately 15 to 30% of a commercial area's total sales. Map 5 shows the primary trade area for E 14th and E 12th Streets and competing centers.

Map 5: Competing Neighborhood Retail Centers



Trade Area Demographics

The demographic data for both trade areas is derived from projections based on 1990 Census.¹² The primary trade area population experienced incredible growth in the past decade. The estimated 1996 primary trade area population is approximately 42,046 persons, while the secondary trade area population is 154,697.

Median household income of the population within the primary trade area and secondary area is estimated at about \$31,158 and \$35,108, respectively for 1996. A large percentage of the households are considered to live below the poverty level and a significant number receive public assistance. Per capita income in the primary trade area is approximately \$10,145, a figure which is lower than the city's per capita income.

As mentioned before, the area is very racially and ethnically diverse. In the primary trade area the majority of the residents (45%) are Asian. Approximately 28% of the population is African American and 21% of the population is of Hispanic origin. Conversely, the secondary trade area population is 35% White. African-Americans and Asians each comprise a quarter, while residents of Hispanic origin make up 20% of the secondary trade area population.

Competition

In defining the primary trade area, the license plate survey results were used to gauge the influence of the East 14th and 12th Street corridor and its competing centers in general terms. Another way of looking at competition is to look at where San Antonio residents shop to satisfy different types of consumer needs. To answer this question we turn to a consumer survey designed and carried out by the University-Oakland Metropolitan Forum in 1990.¹³

For food shopping the survey revealed that the overwhelming majority (80%) of respondents spend more money in supermarkets than local food stores. As such, the Lakeshore Avenue, Downtown Chinatown and Fruitvale districts serve as accessible

¹² These projections were prepared by Urban Decision Systems Inc.

¹³ Anibal Hernandez Santana, A Market Study to Support Neighborhood Commercial Revitalization in the San Antonio Community Development District., p. 10.

convenience goods locations and present major competition for food markets in the corridor.

According to the 1990 survey, Downtown, the Eastmont Mall and Chinatown represent, in that order, are the major competitors in terms of clothing outlets. The consumers surveyed preferred doing most of their shopping in larger stores. This is not surprising because consumers prefer comparison shopping when looking for clothes and the apparel stores on East 14th Street are spread out and not conducive for this type of shopping.

Although the survey did not look at the general merchandise category, the aggregate demand analysis of 1990 recommended this category for possible future retail outlets. Since 1990 various general merchandise outlets have been added to the region, the largest being the 196,000 square feet K-mart store at High Street in Oakland, which opened recently and serves the San Antonio neighborhood and a wider regional market. The AC Indoor Mall and the newer San Antonio Marketplace, on East 14th Street and 25th Avenue, has suffered from the new competition created by this discount store.

Retail Expenditure Potential

Trade area expenditure potential estimates generally provide an indication of the size of the “buying or purchasing power” available to a retail area. These estimates are derived from multiplying the size of the trade area population with the amount of discretionary income that is typically spent for certain type of retail goods. For this low-income area the statewide per capita spending for retail goods was adjusted to reflect the lower per capita income in the neighborhood.¹⁴ Total expenditure potential was estimated at \$12.3 million for 1995 for all retail categories in the primary trade area. For the 42,046 residents within the primary trade area, the total expenditure potential for comparison goods is approximately \$61 million, for convenience goods it is about \$44 million and for eating and drinking establishments, \$18 million. See Table 1 in Appendix E.

¹⁴ Here we assume that the spending patterns for the area are similar to those found in the state of California for all types of retail categories.

Taking in the secondary trade area the total expenditure potential rises to about \$663 million. For the 154,697 residents in this area, approximately \$342.5 million for comparison goods, \$220 million for convenience goods and \$101 million for eating and drinking are available. See Table 2 in Appendix E.

Sales Leakage

The total expenditure potential of a commercial district trade areas cannot be fully seized due to competition, shoppers' habits and other factors. Therefore, the total capturable sales are usually a percent of the expenditure potential of both trade areas. Usually, convenience goods such as food, drugs and liquor are said to capture 90% of the areas potential expenditure, while comparison goods which include apparel, general merchandise, specialty retail such as jewelers, novelties, books, etc., home furnishings and appliances tend to capture approximately 60% of potential expenditure.

However, San Antonio's potential expendable dollars are already being captured by other areas. As we saw in the trade area map, Lakeshore and Fruitvale act as major competitors to this area and currently serve many of San Antonio residents. A good example of this are food related stores. As mentioned before, almost 50% of Lucky's customers located at Lakeshore come from the district. Also, in Fruitvale there is a Safeway and another Lucky's which also serve some of trade area. Presently, the East 14th Street corridor captures 13% of the potential expenditure of the primary trade area.

Another example of competition constraints are general merchandise stores in the commercial corridor. These stores currently capture 2% of the potential expenditure from the primary trade area. This is because general merchandise retailers are usually positioned to serve regional trade areas, with larger selections and lower prices. People are willing to drive from far away to shop at K-Mart or at large general merchandise stores. The smaller scale general merchandise stores which are present in the corridor lose out in the wake of this competition. Table 9 contains the actual capture rates for all retail categories in the NCR area.

Table 9: Actual Capture Rate and Sales Leakage for Commercial Corridor by Market Segment
San Antonio Aggregate Demand Analysis

RETAIL TYPE	Estimated Total 1995 Sales (1)	Percent of Sales by Market Segment (2)	1995 Sales Generated by Market Segment	1995 Expenditure Potential	Current Capture Rate of Potential	Actual Leakage in Sales
<i>Apparel</i>	\$ 1,340,105					
Primary Trade Area		0.7	\$ 938,074	\$ 7,654,361	12%	\$ 6,716,288
Secondary Trade Area		0.25	\$ 335,026	\$ 42,829,906	1%	\$ 42,494,880
Tertiary Trade Area		0.05	\$ 67,005			
		1	\$ 1,340,105			
<i>General Merchandise</i>	\$ 740,842					
Primary Trade Area		0.6	\$ 444,505	\$ 23,681,536	2%	\$ 23,237,031
Secondary Trade Area		0.25	\$ 185,211	\$ 132,509,816	0%	\$ 132,324,605
Tertiary Trade Area		0.15	\$ 111,126			
		1	\$ 740,842			
<i>Specialty Stores</i>	\$ 1,163,158					
Primary Trade Area		0.75	\$ 872,369	\$ 13,173,046	7%	\$ 12,300,678
Secondary Trade Area		0.2	\$ 232,632	\$ 73,709,659	0%	\$ 73,477,027
Tertiary Trade Area		0.05	\$ 58,158			
		1	\$ 1,163,158			
<i>Furniture/ Appliances</i>	\$ 2,020,947					
Primary Trade Area		0.6	\$ 1,212,568	\$ 7,258,345	17%	\$ 6,045,777
Secondary Trade Area		0.25	\$ 505,237	\$ 40,614,001	1%	\$ 40,108,764
Tertiary Trade Area		0.05	\$ 101,047			
		0.1	\$ 1,818,852			
<i>Building Materials</i>	\$ 1,787,789					
Primary Trade Area		0.6	\$ 1,072,673	\$ 9,460,336	11%	\$ 8,387,662
Secondary Trade Area		0.25	\$ 446,947	\$ 52,935,220	1%	\$ 52,488,273
Tertiary Trade Area		0.15	\$ 268,168			
		1	\$ 1,787,789			
<i>Liquor</i>	\$ 434,000					
Primary Trade Area		0.7	\$ 303,800	\$ 1,240,070	24%	\$ 936,270
Secondary Trade Area		0.25	\$ 108,500	\$ 6,938,799	2%	\$ 6,830,299
Tertiary Trade Area		0.05	\$ 21,700			
		1	\$ 434,000			
<i>Food Related</i>	\$ 7,329,823					
Primary Trade Area		0.7	\$ 5,130,876	\$ 34,590,104	15%	\$ 29,459,228
Secondary Trade Area		0.25	\$ 1,832,456	\$ 193,548,605	1%	\$ 191,716,149
Tertiary Trade Area		0.05	\$ 366,491			
		1	\$ 7,329,823			
<i>Drug Stores</i>	\$ 40,528					
Primary Trade Area		0.7	\$ 28,369	\$ 8,725,831	0%	\$ 8,697,462
Secondary Trade Area		0.25	\$ 10,132	\$ 19,530,122	0%	\$ 19,519,991
Tertiary Trade Area		0.05	\$ 2,026			
		1	\$ 40,528			
<i>Eating & Drinking</i>	\$ 5,085,789.00					
Primary Trade Area		0.7	\$ 3,560,052	\$ 18,055,762	20%	\$ 14,495,710
Secondary Trade Area		0.25	\$ 1,271,447	\$ 101,030,851	1%	\$ 99,759,404
Tertiary Trade Area		0.05	\$ 254,289			
		1	\$ 5,085,789			
Total	\$ 19,942,981			\$ 787,486,370		\$ 768,995,496

(1) Source: State Board of Equalization, Taxable Sales & Use Tax, During 3rd and 4th Quarters of 1994 and 1st and 2nd Quarters of 1995.

(2) Estimates based on license plate survey identifying customer base prepared by Oakland Forum 1990.

Actual capture rates give a realistic interpretation of what is happening in the corridor, they also give an estimate of how much money is leaving the community. The money that is not captured by the local retail center is referred to as sales leakage. Table 9 shows a break-down of sales leakage by retail category. The categories with the greatest sales leakage are drugs stores which capture less than one percent of the total expenditure potential in the primary trade area and the general merchandise category which capture two percent. The type of retail stores that currently capture the most of the total expenditure in the primary trade area are liquor at 22%, eating and drinking establishments at 18% and furniture and appliances at 15%.

Potential Growth

Potential growth of the area is dependent on the ability of the area to capture additional sales from the trade areas. However, it is unrealistic to expect that the corridor will capture the traditional 90% of convenience goods and 60% of comparison goods due to competition and other factors. Therefore, the potential capture rates used in the following analysis build upon the actual rates and estimate reasonable improvements for the area for all retail categories. Studies carried out in other lower income areas (i.e. West Oakland and Third Street in San Francisco) estimate that comparison goods can capture 10-15% of primary trade area expenditure potential, while convenience goods capture between 17-19%. These capture rates are used as guidelines for this study.

For the East 14th and East 12th Street corridor the total capturable sales for 1995 are estimated at \$29 million. Table 10 shows the break-down of capturable sales by types of retail goods and primary and secondary trade areas. Total capturable sales for both trade areas are \$10.3 million for comparison goods, \$11.2 million for convenience goods and \$7.5 million for eating and drinking establishments. By subtracting actual sales from capturable sales one can get a reasonable estimate of how much more in sales the area can potentially capture. This figure can be translated to additional supportable square footage by dividing industry standard sales per square feet figures by the sales leakage. Additional supportable square footage represents new retail that the area could possibly support or add in the five to ten years.

Table 10: Supportable Square Feet by Type
San Antonio Aggregate Demand Analysis

RETAIL TYPE	Primary Trade Area				Total Capturable Sales for Primary Trade Area				Total Expenditure Potential from Secondary Trade Area				Total Capturable Sales for Secondary Trade Area				TOTAL CAPTURABLE SALES FOR PRIMARY & SECONDARY TRADE AREA				Sales Leakage based on Potential Capture Rates				Sales per Square Foot(2)				Additional Supportable Square Footage			
	Total Expenditure Potential from Primary Trade Area	Potential Capture Rates(1)	Total Capturable Sales for Primary Trade Area	Total Expenditure Potential from Secondary Trade Area	Potential Capture Rates(1)	Total Capturable Sales for Secondary Trade Area	Total Expenditure Potential from Primary Trade Area	Potential Capture Rates(1)	Total Capturable Sales for Primary Trade Area	Total Expenditure Potential from Secondary Trade Area	Potential Capture Rates(1)	Total Capturable Sales for Secondary Trade Area	Actual Sales(2)	Actual Sales(2)	Actual Sales(2)	Actual Sales(2)	Capture Rates	based on Potential Capture Rates	based on Potential Capture Rates	based on Potential Capture Rates	Sales per Square Foot(2)	Sales per Square Foot(2)	Sales per Square Foot(2)	Sales per Square Foot(2)	Additional Supportable Square Footage	Additional Supportable Square Footage	Additional Supportable Square Footage	Additional Supportable Square Footage				
Comparison Goods																																
APPAREL	\$ 7,654,361	15%	\$ 1,148,154	\$ 42,829,906	2%	\$ 856,598	\$ 23,681,536	2%	\$ 473,631	\$ 132,509,816	0%	\$ -	\$ 2,004,752	\$ 473,631	\$ 1,340,105	\$ 664,647		\$ 664,647	\$ 152	\$ 152	\$ 152	\$ 152	\$ 152	\$ 152	4,373		4,373					
GENERAL MERCHANDISE	\$ 23,681,536	2%	\$ 473,631	\$ 132,509,816	0%	\$ -	\$ 13,173,046	15%	\$ 1,975,957	\$ 40,614,001	2%	\$ 812,280	\$ 3,450,150	\$ 1,901,032	\$ 2,020,947	\$ 1,163,158	\$ 2,286,992		\$ 2,286,992	\$ 133	\$ 133	\$ 133	\$ 133	\$ 133	17,195		17,195					
SPECIALTY STORES	\$ 13,173,046	15%	\$ 1,975,957	\$ 40,614,001	2%	\$ 812,280	\$ 7,258,345	15%	\$ 1,088,752	\$ 52,935,220	2%	\$ 1,058,704	\$ 1,901,032	\$ 2,477,755	\$ 1,787,789	\$ 1,787,789	\$ 689,966		\$ 689,966	\$ 89	\$ 89	\$ 89	\$ 89	\$ 89	7,752		7,752					
FURNITURE/APPLIANCE	\$ 9,460,336	15%	\$ 1,419,050	\$ 342,598,401	2%	\$ 4,201,776	\$ 61,227,624	15%	\$ 6,105,544	\$ 342,598,401	2%	\$ 4,201,776	\$ 10,307,320	\$ 10,307,320	\$ 10,307,320	\$ 10,307,320	\$ 10,307,320		\$ 10,307,320	\$ 10,307,320	\$ 10,307,320	\$ 10,307,320	\$ 10,307,320	\$ 10,307,320								
BUILDING MATERIALS	\$ 61,227,624	25%	\$ 3,100,017	\$ 6,938,799	20%	\$ 1,387,776		25%	\$ 3,100,017	\$ 6,938,799	20%	\$ 1,387,776	\$ 448,793	\$ 448,793	\$ 434,000	\$ 434,000	\$ 14,793		\$ 14,793	\$ 217	\$ 217	\$ 217	\$ 217	\$ 217	88		88					
Convenience Goods																																
LIQUOR	\$ 1,240,070	20%	\$ 248,014	\$ 193,548,605	20%	\$ 38,707,972	\$ 34,590,104	20%	\$ 6,918,021	\$ 19,530,122	0%	\$ -	\$ 10,788,993	\$ 10,788,993	\$ 7,329,823	\$ 7,329,823	\$ 3,459,170		\$ 3,459,170	\$ 260	\$ 260	\$ 260	\$ 260	\$ 260	13,304		13,304					
FOOD RELATED	\$ 8,725,831	20%	\$ 1,745,166	\$ 220,017,526	20%	\$ 44,556,005	\$ 44,556,005	20%	\$ 1,745,166	\$ 220,017,526	20%	\$ 44,556,005	\$ 11,237,786	\$ 11,237,786	\$ 40,528	\$ 40,528	\$ 11,197,259		\$ 11,197,259	\$ 176	\$ 176	\$ 176	\$ 176	\$ 176	63,821		63,821					
DRUG STORES	\$ 44,556,005	25%	\$ 4,513,941	\$ 101,030,851	3%	\$ 3,030,926		25%	\$ 4,513,941	\$ 101,030,851	3%	\$ 3,030,926	\$ 7,544,866	\$ 7,544,866	\$ 5,085,789	\$ 5,085,789	\$ 2,459,077		\$ 2,459,077	\$ 154	\$ 154	\$ 154	\$ 154	\$ 154	15,968		15,968					
Eating & Drinking Places	\$ 18,055,762	25%	\$ 4,513,941	\$ 1,226,263,106	3%	\$ 3,030,926		25%	\$ 4,513,941	\$ 1,226,263,106	3%	\$ 3,030,926	\$ 50,635,078	\$ 50,635,078	\$ 19,942,981	\$ 19,942,981	\$ 30,692,097		\$ 30,692,097	\$ 154	\$ 154	\$ 154	\$ 154	\$ 154								
RESTAURANTS	\$ 229,623,020	25%	\$ 34,671,437		3%	\$ 19,433,973		25%	\$ 34,671,437		3%	\$ 19,433,973																				
TOTAL	\$ 229,623,020		\$ 34,671,437	\$ 1,226,263,106		\$ 19,433,973			\$ 34,671,437	\$ 1,226,263,106		\$ 19,433,973																				

(1) Potential Capture Rates are based upon an improvement of actual capture rates and estimates from other market analysis in lower income areas.
(2) Source: ULI, Dollars & Cents of Downtown/In-town Shopping Centers, 1994

- **Apparel:** The analysis indicates the area could support 6,050 sqft. of additional apparel stores. For the apparel stores to be successful they must cater to the immediate population, be moderately priced and locate along points in the corridor where retail activity tends to cluster. An example could be a clothing store for children or youth located in the first subarea of East 14th Street near Clinton Park.
- **General Merchandise:** This study does not recommend additional square feet for this category. There is already significant competition from other areas of the East Bay and San Antonio has locational and physical constraints that impede these types of stores from naturally locating there. Furthermore, existing stores in this category have been suffering from nearby competition, specifically from the Super K-mart located at High Street.
- **Specialty Stores:** With a eight percent and two percent increase in the current capture rate for the primary trade area and secondary trade area respectively, the area could support 20,494 square feet of additional retail space for this category, but location, price range and type of specialty stores is crucial for the survival of these ventures. The specialty stores could find market niches not served by bigger general merchandise stores and could draw on the cultural diversity of San Antonio residents.
- **Furniture & Appliances:** The area already serves a good portion of the market and could build on these assets to expand in this retail category. Because these type of retail stores represent comparison goods, a few furniture stores could serve as anchors for additional furniture outlets and related types of retail. Presently, the furniture stores are scattered, but perhaps related types of stores located nearby could create a symbiotic relationship among categories.
- **Building Materials:** The area could add approximately 12,000 square feet of additional space in this category, but it is probably wiser to expand existing stores in the area. This category of retail use is also moving away from neighborhoods serving centers and usually caters to a wider regional market. Therefore, it is important that the stores located in the area are large enough to compete with big box types such as Home Depot or Builder's Square. A good example is Standard Brand Paints located

on East 14th Street and 25th Avenue. Because of its size it can offer more variety for a better price.

- **Liquor:** The current capture rate is high in this category and the community wants to discourage this type of retail outlet in the area.
- **Food related:** The area is well served by major chains, but there is probably some room for expansion. The food stores should cater to the immediate population and find niches that have yet to be filled. These stores could continue to take advantage of the different cultural groups in the area. Also, existing food stores could expand their businesses and selections.
- **Drug Stores:** The Walgreen's and Thrifty's located on Lakeshore Avenue currently cater to the needs of the trade area residents, but the analysis shows there is still potential for growth in this retail category. A junior drug store could serve as an anchor for the corridor or existing drug stores, like the New Chinatown Pharmacy located in the shopping center across Clinton Park, could expand their business to capture more sales.
- **Restaurants:** There is an abundance of cafes, fast-food and restaurants in the area that cater to the tastes of the population. Most of the restaurants in the first subarea of East 14th Street cater to the Asian population. Mexican restaurants are scattered along the corridor, but concentrated towards 28th Avenue. However, additional space could be supported and should be located near existing outlets to create a destination place both for trade area residents and people from other areas. The area could market itself as a place where one can find an array of ethnic types of restaurants, a magnet for other retail!

CONSTRAINTS AND OPPORTUNITIES

Based on the above assessment of current conditions and market potential in the East 14th and East 12th Street commercial corridor, this section will summarize constraints and opportunities observed in the district.

There are a number of opportunities in the commercial corridor that contribute to the area's vitality and potential, such as:

- The concentration of Southeast Asian and Latino immigrants in the neighborhood has stimulated local entrepreneurship. The new businesses are usually independently owned entrepreneurial ventures and business owners have found creative ways to obtain and invest capital in their establishments. These ventures have been essential in the revitalization of the commercial corridor.
- A fairly well-established base of retail businesses reflecting a broad mix of commercial, retail, and service oriented uses. It is especially strong in capturing market opportunities not served by traditional retail outlets.
- Affordable rents enable small businesses to settle in the area and serve the surrounding community with necessary goods and services. Tenant demand for retail space is high in some sections of the business corridor as new ventures continue to settle in the East 14th and East 12th corridor.
- Sales are improving in the district as a whole.
- Businesses are clustering in the first subarea of East 14th and East 12th Street between 5th and 9th Avenue near Clinton Park and in the third subarea on East 14th and 25th Avenue creating synergy among different types of retail outlets.
- Organizational capacity and resources to revitalize the area are growing. Example of these include the Neighborhood Commercial Revitalization Program, the Enhanced Enterprise Community and the Merchants Association.
- The East Lake Merchants Association's membership has grown rapidly in the past year as it continues to organize towards revitalization efforts in the area. The association has been very effective in recruiting the Asian businesses and it is truly representative of the diversity found in the ethnic composition of the San Antonio merchants.
- There are still possibilities for growth in specific retail categories like apparel, eating and drinking establishments, drug stores, food related establishments and specialty stores.

However, retail potential is constrained by the following:

- Crime and drugs along the business district discourage pedestrian shopping from being more prevalent, people do not feel safe on the street. The concentration of crime and drug related activity may be contributing to the high vacancy rate found in the area surrounding 23rd Avenue.
- East 14th and East 12th Streets which run through the commercial district are approximately 60 feet wide, with two lanes of traffic in each direction. This discourages pedestrians to feel safe when crossing from one side to the other and therefore hinders pedestrian circulation in the area.
- Visual amenities such as landscaping are lacking and therefore the area does not create an atmosphere that is inviting and appealing to the pedestrian.
- Vacancy factor might be linked to the general age of the properties in the area and the need for, in many cases, significant repair and improvements to make them tenantable. Many properties are older buildings in need of expensive seismic reinforcement and improvements. Many property owners are faced with the dilemma of not being able to rent the spaces without first making substantial capital investment into the property.
- Poor freeway visibility and access. The closest exits to the commercial corridor are the off ramps of the 880 highway at 16th Avenue and 23rd Avenue. The 16th Avenue exit will be closed for the next two years due to repairs. The closing of this exit further isolates the neighborhood from reaching a wider market area.
- San Antonio's expendable dollars are contested by other neighborhood retail centers near the commercial district. Therefore, the stores in the district have to effectively compete in terms of location, price, quality and variety with other competing establishments found in nearby areas.
- Zoning regulations permit all types of businesses from locating in the corridor and therefore causes a haphazard mix of businesses and homes.

VI. RECOMMENDATIONS

Due to years of abandonment and neglect, this inner city community has been left struggling to make ends meet. However, there are many possibilities and positive initiatives coming from the community, specifically the efforts being put forth by the Neighborhood Planning Council, its member organizations and the East Lake Merchants Asociation. San Antonio will be able to improve as a community only if many people join hands and strategically form a vision and an action program which includes all the parties at stake.

The following recommendations are geared to revitalize the commercial area of East 14th and East 12th Street. These are based on the previous analyses, other research done for the greater existing conditions report and information gathered through contacts and work done with different organizations in the community. These recommendations are wider in scope because it is understood that the problems of the retail sector cannot be addressed just by looking at the market potential and possibilities for new commercial development in the district. These recommendations will be incorporated in the wider strategic plan being prepared by the Neighborhood Planning Council and the NCR Program in the following planning phase.

For the commercial area to survive and expand it must improve many aspects of its internal organization and external contacts. Many tasks have to be accomplished and it is only with the cooperation of city departments, the community institutions and the businesses in the area that this will take place. Because of limited funds, each action and initiative should be seen as a way to include the wider community and meet a multiplicity of goals.

The following section spells out the vision, goals, policies and strategies for the revitalization of the lower San Antonio area and specifically the commercial corridor of the District. The vision and goals clarify the overarching priorities for the area. The policies and strategies are arranged by issue areas as they work towards the fulfillment of the expressed goals. Because of the length of the corridor and different constituencies, the NCR program can not work on the entire commercial zone. It must select where its

energies will be focused. The NCR strategies should build on the existing successes and focus resources to enhance these areas.

VISION: Create a clean, safe, prosperous community and business neighborhood for the diverse population of San Antonio.

GOAL # 1: Revitalize the East 14th Street and E 12 Street Corridor Through Appropriate Physical Projects, Economic and Housing Development.

GOAL #2 : Protect and Improve Neighborhood Quality of Life

GOAL #3 : Increase Public Safety For Residents, Merchants and Customers

GOAL #4: Build capacity of existing organizations and programs

PUBLIC SAFETY

POLICY: Maintain a visible and community-oriented police presence along the commercial corridor.

- Strategy: The police department does have officers targeted for each beat area in Oakland, but they are usually in vehicles and not assigned to walk in the community. There is a lack of officers to keep up with the problems in the area. Therefore, the community will have to propose alternative ways to assure safety in the neighborhood. A good idea could be “community service guides”. These guides could be citizens trained by police to walk along the street to disperse any problems or call officers if needed.

POLICY: Identify hot spots in the commercial corridor and design strategies to solve the causes which are clustering activity in those particular areas.

- Strategy: Involve merchants, citizens groups and police department in designing strategies to control problematic areas.
- Strategy: Work with the area’s immigrant population for them to understand who they can call in case of emergencies. Sometimes the people that live in the area are afraid of calling the police and therefore become victims of criminal activity.

PHYSICAL ENVIRONMENT

POLICY: Develop a vision of how the commercial corridor will look like in the future to further the revitalization process.

- Strategy: Develop the third phase of the NCR planning process with the completion of a physical design analysis which recommends land use and zoning changes, design guidelines, street level improvement programs and catalyst development projects. This could be a good studio topic for the Urban Design concentration in the Department of City and Regional Planning at the University of California, Berkeley.
- Strategy: The Montgomery Ward site, located on East 14th Street and 29th Avenue, has the potential of being redeveloped in the next couple of years. The City plans to demolish the nine story structure and this would clear approximately 10 acres of land in the Fruitvale District. The project will have considerable impact on the San Antonio district and specifically on the business located in the commercial corridor. Therefore, the new uses contemplated for the site should be compatible with the needs and vision of the NCR area, which are to create a prosperous community and business district. One potential project could be one that combines many uses such as an entertainment and recreation hub, housing, limited commercial space and an educational and training center for the community. This could be a good studio topic for the Project Development concentration in the Department of City and Regional Planning at the University of California at Berkeley.

POLICY: Develop and implement short-term action projects that could make the area more visually pleasing while the physical design analysis is being accomplished.

- Strategy: Continue to plant trees along the commercial corridor. The Office of Parks and Recreation in conjunction with the NCR program and the ELMA have been responsible in acquiring trees for the subarea of Clinton Park. The trees will be planted in April of this year and another activity can be scheduled to repeat the tree planting activity in another subarea in the coming year.

- Strategy: Repave East 14th Street in its entirety and define crosswalks at intersections. The Office of Public Works has this project schedule for this year.
- Strategy: Talk to property owners of existing vacant properties and suggest a Windows Project to fill up the vacant storefronts and give continued visual entertainment for retail shoppers. The NCR successfully implemented this program in the Fruitvale district.

POLICY : The efforts to revitalize East 14th and East 12th Streets should be concentrated in two subareas of the commercial strip, the section surrounding Clinton Park between 5th and 9th Avenues, where many neighborhood serving retail outlets naturally cluster, and around 25th and 28th Avenues which has major assets like the new San Antonio Marketplace, the AC Indoor Mall and the St. Joseph's Medical Center.

- Strategy: Design and install banners at these key areas to beautify and attract people to these retail outlets. These banners will be financed through the NCR Program and the ELMA. Major facade improvements could be scheduled during the urban design phase.
- Strategy: Organize a paint day in which all businesses will paint their facades. Paint can be obtained through the NCR Program and the Office of Public Works. The organization of the event should be led by ELMA.
- Strategy: A targeted facade improvement program can create a visual statement that the commercial area is becoming more attractive and inviting, both to shoppers and potential property and business owners. The NCR Program has the Americorps Storefront Renovation Program in place which can be used for minor renovation projects.

ECONOMIC DEVELOPMENT

POLICY : Increase the capacity of existing businesses in the commercial corridor to continue and expand their businesses. Special attention should be given to try to retain successful and mature businesses which have been in the area for five years or more.

- Strategy: The Enhanced Enterprise Community's One-Stop Capital Shop should serve as the main source of assistance for these businesses. Communications between the director of the program and ELMA should be continued so that the staff understand the needs of the merchants in the area. The Capital Shop's Entrepreneurship Training Program can provide assistance to business owners on business taxes, finance, credit repair and business planning. Furthermore, mature businesses can seek specific help and can take advantage of the one-stop shop's one to one counseling program. In addition to the EEC, the NCR Program could provide the list of businesses that should be targeted and ELMA could design flyers and an informational packet in different languages to invite merchants to participate.
- Strategy: Design and carry out a business survey to understand the needs of the merchants and to find out how they can contribute to the revitalization of the commercial corridor.

POLICY: Create a distinct identity for the corridor and its subareas. The merchants in the area must make the area unique and distinct from competing centers in Lakeshore and Fruitvale districts.

- Strategy: The NCR Program can offer area-wide marketing and promotional assistance to the ELMA including newsletter preparation, group advertising and directories. Through these initiatives the businesses in the area can emphasize the interesting variety of food, restaurants, services and ethnically-oriented merchandise available on the corridor.
- Strategy: The East 12th Street corridor can be similar to the "Auto-Row Boulevard" in Oakland and get recognition for auto-related services throughout the East Bay. Advertising signs in the East 12th corridor are visible from the Highway 880 and could serve as an anchor for the rest of the retail in the neighborhood. The NCR staff can identify and meet with auto-related shop owners in the area to encourage relocation to East 12th Street.

POLICY: Encourage different types of neighborhood retail businesses to locate in the area based on the market analysis recommendations.

- Strategy: The market analysis recommends different types of stores which could probably locate in the East 14th and East 12th Street corridor. These include apparel, specialty stores and eating and drinking establishments. A list of recommended stores types could be prepared by the NCR staff and workshops with property owners could be scheduled to inform them about revitalization efforts in the area and to encourage tenant selection.
- Strategy: Certain types of stores like drug stores, furniture & appliances, building materials and food stores have the potential to expand their businesses. The NCR staff could identify and work with the businesses owners to improve and expand the quality and selection offered to customers.

HOUSING

POLICY: Encourage a diversity of new housing opportunities in the commercial corridor. Residents of this housing could support the commercial revitalization of the corridor.

- Strategy: Housing should be encouraged in subarea 2 between 14th and 23rd Avenues. By fostering new residential development between the other commercial subareas, the commercial strip can transition to areas primarily used for residential and live-work uses which will help make the existing commercial corridor economically viable.
- Strategy: The housing development projects should be designed to alleviate the overcrowded conditions observed in the census tracts along the commercial corridor.
- Strategy: Mixed use development should be allowed in the existing commercial areas, but should be discouraged in subareas targeted for residential uses along the corridor.

INSTITUTIONAL CAPACITY

POLICY: Strengthen the capacity of the organizations working in the community so they can be the main actors of the revitalization process.

East Lake Merchants Association

- Strategy: The Association must continue to improve their ability to advocate for the revitalization efforts in the area. Also, they must procure future funding with city government if the different improvements planned for the area are to be accomplished. In the next year, the association can contact other merchants associations to find ways in which they could improve operations and strategies to further their goals.
- Strategy: The ELMA should expand its membership to merchants located in the corridors between 24th and 28th Avenues. Presently, its members are located on East 14th and East 12th Street between 1st and 23rd Avenues. By expanding their scope, the Association will represent all the merchants in the NCR commercial corridor. This could lessen fragmentation and duplication of efforts between merchants and city departments.

Neighborhood Planning Council

- Strategy: After the Neighborhood Plan is finished, the Neighborhood Planning Council must concentrate its efforts in networking and collaborating among each other. Many of the tensions in the community come from cultural differences and turf issues among different cultural groups and organizations. The NPC should act as an association which brings unity and understanding among this diverse community. Activities like street fairs should be encourage to bring residents and groups together. Specifically, the members of the NPC should continue to invite the San Antonio Community Development Corporation to join the Council. This entity is an important one in the community and should be one of the protagonists in this coalition.
- Strategy: The NPC action plan should include the coalition's work plan for the next two years. Their objectives should be attainable and should concentrate on both short-term and long-term strategies. The short term strategies should be geared to achieve small victories in the community. These can increase confidence, trust and

involvement among residents and organizations. Some of these could include tree planting activities, block parties or informational fairs to keep the community and organizations educated on the different initiatives and programs currently taking place. Long-term strategies should address deeper problems faced by this community. The coalition should select one initiative and work towards that goal for longer periods of time. These initiatives could address employment, youth, crime, commercial or housing development issues in the community. Example of campaigns could be the future of the Montgomery Ward site, a branch of the Public Library in the community, or school to work programs among others.

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Neighborhood Commercial Revitalization Planning Process

1. ORGANIZATION
Community Group
Identification/Organization

3. STRATEGY DEVELOPMENT
Community Action Plan Formulation
Community Design Workshop .Plan
Development Tour

2. PLANNING
Community Meetings
Inventory of Existing Conditions &
Issues
Visioning Process

4. IMPLEMENTATION
Implementation of Action Items
Coordination of City Departments
Community Projects
Financial/Technical Assistance

VIII. APPENDICES

Appendix A- NCR Planning Process

Appendix B- Business Inventory by Subareas

Appendix C- Methodology of the Market Analysis

Appendix D- Enhanced Enterprise Community

Appendix E- Expenditure Potential for Primary & Secondary Trade
Area

Appendix C: Methodology and Data Sources for the Market Analysis

There were different steps in accomplishing the market analysis:

- Identification of all necessary data needed for the analysis. This included information about the supply of commercial land uses in the commercial corridor and about the existing demand for the commercial uses. The information gathered included the type of uses, the square footage of these businesses and the sales by type of businesses. Sales information was gathered through the State Board of Equalization Taxable Sales & Use Tax in California for the last two quarters of 1994 and first two quarters of 1995.
- Identification of the trade area, the geographical area where the majority of the customers support is originating. For purpose of this analysis, the geographical areas within a mile and two mile radius from the commercial core, at the intersection of East 14th Street and 14th Avenue, were used as the primary and secondary trade areas.
- Demographic information about the existing and future population in the trade areas was obtained through Urban Decisions Systems Inc.
- Identification of competing neighborhood retail centers and information about where San Antonio residents shop was obtained from a report prepared by the Oakland Forum in November 1991.
- By estimating the total existing expenditure potential and the existing capture rates by retail type, an analysis of existing gaps was made for the different retail categories.
- Using actual rates as the basis and estimating reasonable improvements in these capture rates and assessment of potential growth was estimated for each retail type in the commercial corridor.
- Based on this analysis, recommendations were made on potential growth in the area and additional supportable square feet that could be supported.

Appendix B: Business Inventory by Subarea

Neighborhood Commercial Revitalization Commercial Space Inventory, 1995

Subarea 1: East 14th and East 12th Street from 1st to 14th Avenues

COMPLETE INVENTORY	East 14 Street	East 12th Street	Avenues	Total	Percent
APPAREL Total	4	2	1	7	2%
GENERAL MERCHANDISE Total	0	1	0	1	0%
OTHER RETAIL Total	21	7	5	33	12%
LIQUOR Total	3	1	0	4	1%
FOOD RELATED Total	18	16	2	36	13%
DRUG STORES Total	3	1	0	4	1%
FURNITURE/APPLIANCE Total	1	0	1	2	1%
BUILDING MATERIALS Total	1	4	2	7	2%
AUTO RELATED Total	11	23	10	44	15%
BUSINESS & REPAIR Total	43	19	8	70	24%
INDUSTRIAL Total	6	16	11	33	12%
OTHER OUTLETS Total	0	0	2	2	1%
UNKNOWN Total	0	0	1	1	0%
VACANT Total	14	10	8	32	11%
VACANT LOTS Total	4	1	5	10	3%
Grand Total	129	101	56	286	100%

Subarea 2: East 14th and East 12th Street from 15th to 23rd Avenues

COMPLETE INVENTORY	East 14 Street	East 12th Street	Avenues	Total	Percent
APPAREL Total	1	0	0	1	1%
GENERAL MERCHANDISE Total	0	0	0	0	0%
OTHER RETAIL Total	7	0	0	7	4%
LIQUOR Total	0	0	1	1	1%
FOOD RELATED Total	15	0	3	18	10%
DRUG STORES Total	0	0	0	0	0%
FURNITURE/APPLIANCE Total	7	0	0	7	4%
BUILDING MATERIALS Total	1	0	0	1	1%
AUTO RELATED Total	12	11	6	29	16%
BUSINESS & REPAIR Total	12	3	7	22	12%
INDUSTRIAL Total	15	6	5	26	14%
OTHER OUTLETS Total	2	0	0	2	1%
UNKNOWN Total	3	1	1	5	3%
VACANT Total	28	6	19	53	29%
VACANT LOTS Total	6	1	2	9	5%
Grand Total	109	28	44	181	100%

Subarea 3: East 14th and East 12th Street from 24th to 28th Avenues

COMPLETE INVENTORY	East 14 Street	East 12th Street	Total	Percent
APPAREL Total	7	0	7	8%
GENERAL MERCHANDISE Total	1	0	1	1%
OTHER RETAIL Total	4	0	4	5%
LIQUOR Total	0	0	0	0%
FOOD RELATED Total	7	1	8	10%
DRUG STORES Total	3	0	3	4%
FURNITURE/APPLIANCE Total	0	0	0	0%
BUILDING MATERIALS Total	1	0	1	1%
AUTO RELATED Total	3	4	7	8%
BUSINESS & REPAIR Total	42	2	44	52%
INDUSTRIAL Total	0	0	0	0%
OTHER OUTLETS Total	1	0	1	1%
UNKNOWN Total	0	0	0	0%
VACANT Total	7	0	7	8%
VACANT LOTS Total	0	1	1	1%
Grand Total	76	8	84	100%

Appendix C: Methodology and Data Sources for the Market Analysis

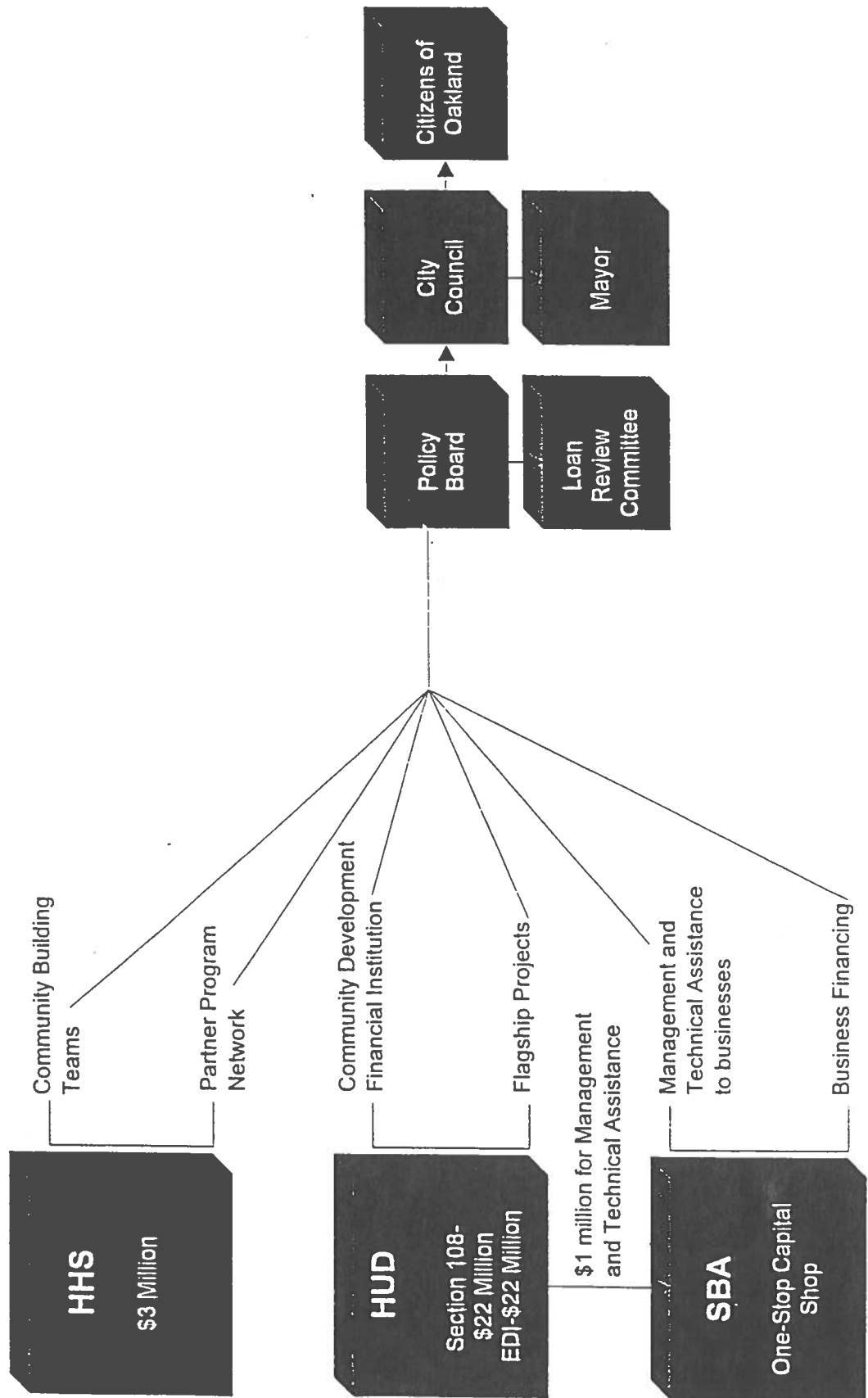
There were different steps in accomplishing the market analysis:

- Identification of all necessary data needed for the analysis. This included information about the supply of commercial land uses in the commercial corridor and about the existing demand for the commercial uses. The information gathered included the type of uses, the square footage of these businesses and the sales by type of businesses. Sales information was gathered through the State Board of Equalization Taxable Sales & Use Tax in California for the last two quarters of 1994 and first two quarters of 1995.
- Identification of the trade area, the geographical area where the majority of the customers support is originating. For purpose of this analysis, the geographical areas within a mile and two mile radius from the commercial core, at the intersection of East 14th Street and 14th Avenue, were used as the primary and secondary trade areas.
- Demographic information about the existing and future population in the trade areas was obtained through Urban Decisions Systems Inc.
- Identification of competing neighborhood retail centers and information about where San Antonio residents shop was obtained from a report prepared by the Oakland Forum in November 1991.
- By estimating the total existing expenditure potential and the existing capture rates by retail type, an analysis of existing gaps was made for the different retail categories.
- Using actual rates as the basis and estimating reasonable improvements in these capture rates and assessment of potential growth was estimated for each retail type in the commercial corridor.
- Based on this analysis, recommendations were made on potential growth in the area and additional supportable square feet that could be supported.

Appendix D: Enhanced Enterprise Community- Program Structure and One-Stop Capital Shop Resources

ENHANCED ENTERPRISE COMMUNITY

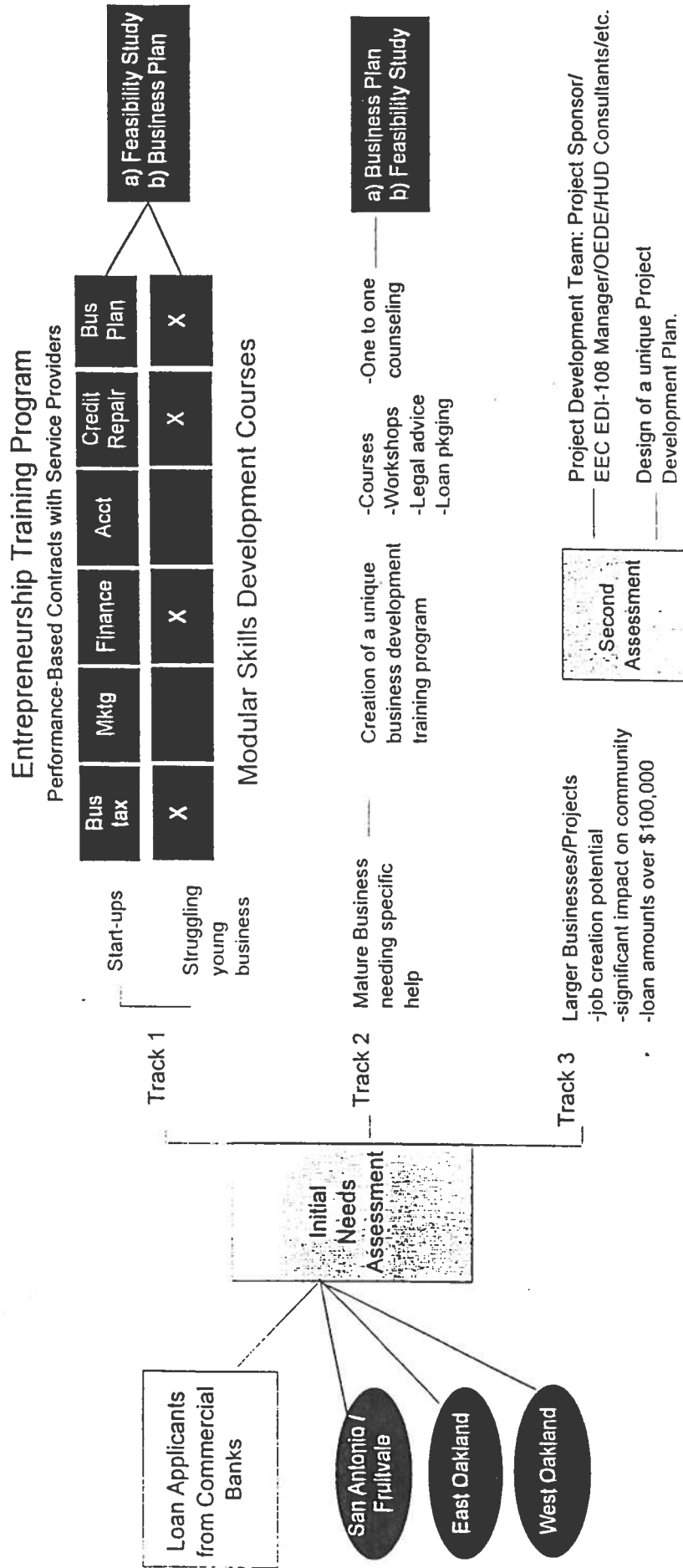
PROGRAM DESCRIPTION



ATTACHMENT A

ONE-STOP CAPITAL SHOP

(PRELIMINARY PROGRAM OUTLINE)



Attachment B:
One-Stop Capital Shop Resources

ACTIVITY	PROGRAM DESCRIPTION	MARKET	SPACE	CONTACT
Oakland Business Development Corporation (OBDC)	This nonprofit economic development organization provides a variety of financing programs and loan packaging services to Oakland-based small businesses. OBDC also packages SBA Women Pre-Qualification Loans and other SBA 7(a) loans for referral to SBA lenders. OBDC also operates as an SBA Section 504 Associate Development Corporation approved to market and assist businesses in obtaining SBA 504 financing for real estate acquisition. Sec 504 loans typically are for established businesses seeking expanded facilities with loan amounts from \$1 to \$3 million.	City-wide program - Existing business. Sec 504 loans - mid sized expanding businesses	2,500 sq. ft. (currently located on Lower Level)	Mike McPherson, Executive Director
OSCS Information and Referral Assistance	Screening, referral, and general information currently provided within OEDE to the small business community would be collocated at the OSCS. The OEDE Information Specialist would pre-screen clients, direct them to resource providers, and schedule training and counseling appointments	Oakland Small Business clients	200 sq. ft. (includes reception area)	Selma Taylor, East Bay SBDC
SBA Business Information Center (BIC)	The Business Information Center is the key business planning resource of the OSCS. A BIC provides the latest in reference materials, video, and high technology hardware, software, and telecommunications connections to assist start-up and emerging entrepreneurs in accessing market research databases, spreadsheets and business planning software. SBA funding also provides the services a full-time Business Information Center Coordinator to assist in training users and developing custom-tailored programs. BIC services are free and an established BIC typically handles 1,000 - 3,000 cases annually.	Pre business entrepreneurs -East Bay. Primary marketing to EZ areas	1,500 sq. ft.	SBA BIC Manager to be named
East Bay Small Business Development Center (SBDC)	The SBDC is co-funded by SBA and the state of California to provide in-depth business counseling, training and technical assistance. The SBDC also operates a Minority and Women's certification program, a contractors assistance program, an international trade program, and provides loan packaging services. Last year the SBDC counseled 245 small businesses and held 55 training events.	Existing Businesses in Alameda County	1,800 sq. ft.	Selma Taylor Director

**Attachment B:
One-Stop Capital Shop Resources**

ACTIVITY	PROGRAM DESCRIPTION	MARKET	SPACE	CONTACT
SBA 7(a) Guaranty lender	SBA lending can be used for working capital, equipment, tenant improvements, debt refinancing and real estate. LowDoc lending for loans under \$100,000 and regular SBA 7(a) Loans for loans from \$100,000 to \$500,000. The SBA OSCS Lender may include a Commercial Loan Officer from the Community Bank of the Bay (proposed) or other SBA lenders currently serving Oakland. During 1994, 64 SBA 7(a) Guaranty Loans totalling \$20,403,470, were made to Oakland-based small businesses.	Existing and Start-up businesses	500 sq. ft.	N/A
SBA - Oakland Enterprise Community Microlender	In conjunction with Oakland's EJC program, an SBA Microloan program provides small loans, typically from \$5,000 to \$25,000, as well as some business counseling. SBA has advertised Microloan funding to allow up to a \$750,000 loan to a OSCS-based non-profit intermediary to relend to microenterprises. Grant funding to the nonprofit is also awarded to provide the necessary technical assistance to those small borrowers. City EEC funds provide the 15% match to leverage SBA Microloan funds.	Microenterprises, both start-up and existing, primarily in the Enterprise Neighborhoods	150 sq. ft.	SBA Microloan Program Award due September 30
City of Oakland EEC Lending Programs	Provides small business access to several loan programs in conjunction with the HUD-Section 108/EDI funded Enhanced Enterprise Community designation.	Enterprise Community businesses and neighborhood projects	125 sq. ft.	Avon Manning
City of Oakland OEDE Lending Programs	Provides small and medium businesses access to several City-sponsored loan programs including HUD Section 108 loans, the Broadway Corridor Loan Fund, Commercial Industrial Real Estate Loan Program, Redevelopment Agency loans, and the proposed NCRRevolving Loan Fund.	Oakland small and medium sized businesses.	375 sq. ft.	Art Scott
Oakland Multi-Bank Lending Consortium	Bank consortia providing financing to businesses from \$5,000 to \$25,000. The loan program is to be administered by OBDC.	Start-up and early stage businesses city-wide	500 sq. ft.	Mike McPherson, Executive Director

Attachment B:
One-Stop Capital Shop Resources

OTHER POSS. ORGS.	PROGRAM DESCRIPTION	MARKET	SPACE	CONTACT
Business Incubator	For the micro-businesses assisted through the OSCS, the availability of a business incubator to provide the services, support and ongoing consulting is critical for the early stage firms.	"Young" businesses requiring low cost space and support services	2,500 sq. ft. (Proposed for Lower Level)	N/A
California Economic Development Lending Initiative (CEDLI)	State-wide bank loan pool targeted to near-bankable borrowers, non-profit real estate developments, and loans to non-profit economic development organizations for relending to microloan programs	Non Profit Real Estate projects, Intermediary Lenders, "Near Bankable" borrowers	1,000 sq. ft.	George Williamson President
Minority Business Development Center	The Minority Business Development Agency funds the Minority Business Development Center contractor to assist minority businesses in Oakland. An MBDC provides consulting services to minority businesses at reduced costs.	Minority Businesses	500-700 sq. ft.	
UC Berkeley, Haas School of Business, East Bay Outreach Project	The Outreach Project's Fast Trac I and II provides intensive, business plan development and management training programs for aspiring and existing small business owners.	Minority and Women-Owned Businesses in Oakland, Berkeley and Richmond	Use of Training Facility	Robert Joyner, Director

Attachment B:
One-Stop Capital Shop Resources

ACTIVITY	PROGRAM DESCRIPTION	MARKET	SPACE	CONTACT
SCORE (Service Corps of Retired Executives) Chapter	SCORE is a volunteer organization funded by SBA to provide training, mentoring and counseling services to small businesses. SCORE Counselors also assist entrepreneurs in utilizing the BIC. During 1994, the Oakland SCORE Chapter provide free counseling to 1,200 existing or prospective businesses, and conducted 14 Pre-business Workshops for 300 new entrepreneurs.	Start-up and existing businesses in Alameda County	500 sq. ft.	Frost Prioleau, Chapter Chairman
WISE (Women's Initiative for Self Employment)	WISE receives SBA funding to serve low and moderate income women, providing entrepreneurial training and microloans. During 1994, WISE served 400 clients, trained 164 women, and conducted 33 workshops.	Oakland Low/Moderate income Women owned businesses	1,700 sq. ft. (Currently located on the Third Floor)	Helen Brannon, Director
Small Business Training Facility	Classroom space to provide on-site training for all of the technical assistance organizations. Training programs will range from pre-business workshops to in-depth Entrepreneurial Training to specialized training on government procurement and International Trade.	Oakland Small Business training clients	500 sq. ft.	SBA Funded OSCS Manager
Oakland Community Building Team	The Enhanced Enterprise Community proposal includes teams to improve the channels of communication between the City and the EEC residents. The connection to the OSCS by these teams would provide the best linkage to the business training, technical assistance, and microloaning to those neighborhoods. The EEC proposal also calls for a structured "Entrepreneurial Training" program to be designed as part of the targeted assistance to the residents of the EEC neighborhoods which could be coordinated by the CBTs.	Enterprise Community Building Team participants	1,000 sq. ft.	Jean Johnson

Appendix E: Expenditure Potential for Primary and Secondary Trade Areas

Table 2: Potential Retail Demand for Secondary Trade Area
San Antonio Market Analysis

RETAIL TYPE	1994-95 Statewide Per Capita(1)	Adjusted Trade Area Residents Per Capita(2)	Total Expenditure Potential from Primary Trade Area	Potential Capture Rate for Primary Trade Area	TOTAL CAPTURABLE SALES FOR PRIMARY TRADE AREA
<i>Comparison Goods</i>					
APPAREL	\$ 326.65	\$ 276.86	\$ 42,829,906	2%	\$ 856,598
GENERAL MERCHANDISE	\$ 1,010.61	\$ 856.58	\$ 132,509,816	0%	\$ -
SPECIALTY STORES	\$ 562.16	\$ 476.48	\$ 73,709,659	2%	\$ 1,474,193
FURNITURE/APPLIANCE	\$ 309.75	\$ 262.54	\$ 40,614,001	2%	\$ 812,280
BUILDING MATERIALS	\$ 403.72	\$ 342.19	\$ 52,935,220	2%	\$ 1,058,704
			\$ 342,598,601		\$ 4,201,776
<i>Convenience Goods</i>					
LIQUOR	\$ 52.92	\$ 44.85	\$ 6,938,799	2%	\$ 138,776
FOOD RELATED*	\$ 1,476.13	\$ 1,251.15	\$ 193,548,605	2%	\$ 3,870,972
DRUG STORES	\$ 148.95	\$ 126.25	\$ 19,530,122	0%	\$ -
			\$ 220,017,526		\$ 4,009,748
<i>Eating & Drinking</i>					
RESTAURANTS	\$ 770.53	\$ 653.09	\$ 101,030,851	3%	\$ 3,030,926
TOTAL			\$ 663,646,979		\$ 19,453,973

California Population= 29,760,021
California per capita= \$ 16,409
Secondary Trade Area Population 154,697
Trade Area Per Capita Income= \$ 13,908
Percentage of State Expenditure Tax= 85%
Therefore percentage adjustment per capita= 0.85

(1) Source: State Board of Equalization, Taxable Sales & Use Tax,
for the last two quarters of 1994 and first two quarter of 1995.

(2) California per capita expenditure was adjusted to reflect the lower per capita in the secondary trade area.

* State Board of Equalization notes that non-taxable items equals 70% of total grocery sales and 60% of drug store sales.

An adjustment to sales revenue of \$442.84 for food items was made to reflect total expected sales revenue.

An adjustment to sales revenue of \$148.95 for drug store items was made to reflect total expected sales revenue.

Appendix E: Expenditure Potential for Primary and Secondary Trade Areas

Table 1: Potential Retail Demand for Primary Trade Area
San Antonio Market Analysis

RETAIL TYPE	1994-95 Statewide Per Capita(1)	Adjusted Trade Area Residents Per Capita (2)	Total Expenditure Potential from Primary Trade Area	Potential Capture Rate for Primary Trade Area	TOTAL CAPTURABLE SALES FOR PRIMARY TRADE AREA
<i>Comparison Goods</i>					
APPAREL	\$ 326.65	\$ 182.05	\$ 7,654,361	15%	\$ 1,148,154
GENERAL MERCHANDISE	\$ 1,010.61	\$ 563.23	\$ 23,681,536	2%	\$ 473,631
SPECIALTY STORES	\$ 562.16	\$ 313.30	\$ 13,173,046	15%	\$ 1,975,957
FURNITURE/APPLIANCE	\$ 309.75	\$ 172.63	\$ 7,258,345	15%	\$ 1,088,752
BUILDING MATERIALS	\$ 403.72	\$ 225.00	\$ 9,460,336	15%	\$ 1,419,050
			\$ 61,227,624		\$ 6,105,544
<i>Convenience Goods</i>					
LIQUOR	\$ 52.92	\$ 29.49	\$ 1,240,070	25%	\$ 310,017
FOOD RELATED*	\$ 1,476.13	\$ 822.67	\$ 34,590,104	20%	\$ 6,918,021
DRUG STORES*	\$ 372.38	\$ 207.53	\$ 8,725,831	20%	\$ 1,745,166
			\$ 44,556,005		\$ 8,973,204
<i>Eating & Drinking</i>					
RESTAURANTS	\$ 770.53	\$ 429.43	\$ 18,055,762	25%	\$ 4,513,941
California Population=	29,760,021				
California per capita=	\$ 16,409				
Primary Trade Area Population=	42,046				
Trade Area Per Capita Income=	\$ 9,145				
Percentage of State Expenditure Tax=	56%				
Therefore percentage adjustment per c	0.56				

(1) Source: State Board of Equalization, Taxable Sales & Use Tax, for the last two quarters of 1994 and first two quarter of 1995.

(2) California per capita expenditure was adjusted to reflect the lower per capita in the primary trade area.

* State Board of Equalization notes that non-taxable items equals 70% of total grocery sales and 60% of drug store sales.

An adjustment to sales revenue of \$442.84 for food items was made to reflect total expected sales revenue.

An adjustment to sales revenue of \$148.95 for drug store items was made to reflect total expected sales revenue.