

Westside Economic Development Strategy

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Prepared for
City of Ventura

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INTRODUCTION

The Westside neighborhood has been the subject of several economic and land use planning efforts over a number of years. Just last year, the City adopted its new General Plan and is now prepared to draft and adopt a Community Plan for the Westside and North Avenue to help facilitate the community's vision for development. The Economic Strategic Plan is intended to provide an economic development framework for the Community Plan, to ensure that the economic goals of the community can be implemented in a realistic and feasible way. As such, the Strategic Plan represents a summary of the past community planning work that has occurred in recent years, rather than a new direction for economic growth in the area. The Strategic Plan draws on a number of documents that have been completed to address various facets of economic development and design in the Westside, including:

- ? Westside Economic Initiative
- ? Feasibility Study for ECO Industrial Park
- ? Westside Revitalization Plan
- ? Westside Urban Design Plan
- ? Ventura Vision
- ? Ventura Economic Development Strategy
- ? Ventura General Plan

ECONOMIC STRATEGY FOCUS AREA

The focus of the Economic Strategic Plan begins at the southern end of Ventura Avenue where the Westside abuts the Downtown area along Park Row. Moving north, the area includes the neighborhoods between SR 33 and the bluffs all the way past the City boundaries to the area just north of the Canada Larga interchange (See Figure 1 – Avenue to the Future). About half of the project area is currently in County jurisdiction, although most of it is within the City's Planning

current Boundary for the General Plan, and the City's current Sphere of Influence (SOI).

The northernmost properties in the focus area are immediately north of the City's water treatment facility (See Figure 2 – Site 6). These properties are not within the City's current SOI, although the portion of Site 6 west of SR 33 is within the General Plan Planning Boundary and borders the City's current SOI boundary. The portion of Site 6 east of SR 33 is not within the Planning Boundary. These properties were included in the economic study in order to evaluate their economic potential in relation to potential projects on other properties south of the treatment plant, particularly the Brooks Institute site and other sites to the south.

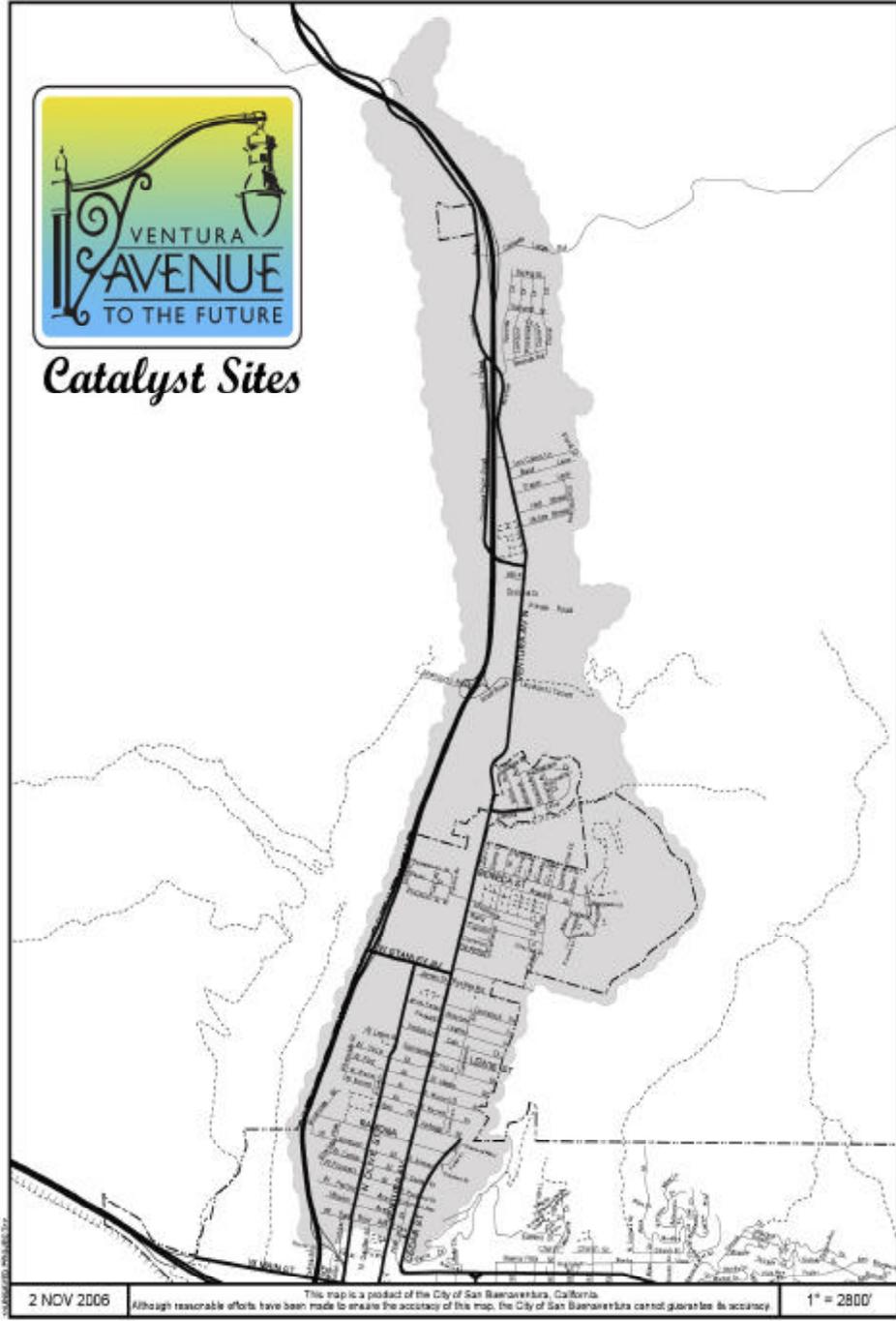


FIGURE 1 - (STUDY AREA)

COMMUNITY PROCESS

The Economic Strategic Plan is part of the City's "Avenue to the Future" for the Westside and North Avenue communities. Public participation has included to date three community workshops, in May, July, and August, a business survey (Appendix A) and numerous personal interviews with local business owners, property owners and community leaders. It is anticipated that the City Council will review the Strategic Plan in November.

Several key issues have been expressed through these various opportunities for public input:

- ? Desire for high quality jobs, with an emphasis on technology-based occupations.
- ? Widespread support for expansion of business activities associated with the arts and with education, including expansion of Brooks Institute in the north and expansion of artist facilities and services in the southern neighborhoods on the Westside.
- ? Interest in removing blight from existing neighborhoods (See Appendix C) and to improve the image of the areas as mean for creating an attractive business climate.
- ? Concern among existing industrial and distribution businesses that future economic transitions not remove their ability to continue to operate in the community.

GOALS

The following goals have been established for the Westside Economic Strategy, which provide a framework for the action plan presented in the next chapter.

1. Quality job development
2. Increase local shopping opportunities
3. Provide workforce housing
4. Increase arts and cultural activities
5. Encourage higher value land uses

6. Add mixed use developments
7. Integrate environmental quality and lifecycle economics into the design process

SUMMARY OF THE ECONOMIC STRATEGIC PLAN

The consultants have prepared a market analysis of retail development potential for the Westside and North Avenue and a target industry analysis to identify job development opportunities. City staff has identified six “catalyst sites” that may offer significant potential to stimulate economic development in the focus area. The consultant has discussed preliminary development options with the property owners and has suggested land use scenarios for the sites that would capitalize on both short term and long term market opportunities. This market analysis may be found in Appendix B.

The Plan also describes potential funding opportunities to implement the Strategic Plan. Chief among these would be the possibility of creating a redevelopment project area in the Westside and North Avenue. The consultant has prepared a preliminary analysis to determine if the area could meet the state guidelines for blight, which is required in order to establish a project area. The consultant has also prepared preliminary projections of tax increment revenues, which indicate the funding capacity that a project area could have to help pay for infrastructure improvement, elimination of blight condition, and other business attraction and development efforts. These redevelopment feasibility studies, which may be found in Appendix C, indicate that the Westside can meet the blight requirements for establishment of a project area, and that the project area would have sufficient funding capacity to feasibly contribute to economic development activities.

Much of the near term development opportunity, and indeed much of the redevelopment potential, exists in the North Avenue area currently in County jurisdiction. Therefore, an important focus of the Strategic Plan is on the need to incorporate this area into the City’s planning efforts and to annex at least portions of the area into the City boundaries.

The planned expansion of the Brooks Institute represents a major potential catalyst to development of surrounding properties both for business space and for new residential development. In order to be fully involved with the planning of this area, the City needs to have jurisdiction.

The considerations outlined above suggest the following general sequence of steps for implementing the strategic plan. More specific steps and activities are included in the Action Plan in the next chapter.

- 1.** Adopt new Community Plan to preserve and expand existing employment areas.
- 2.** Review and act on project applications consistent with the Community Plan.
- 3.** Pursue annexation of North Avenue Area.
- 4.** Establish Redevelopment Project Area.
- 5.** Review and Act on Brooks Institute expansion application.
- 6.** Ongoing implementation of other ED strategies.

ACTION PLAN

This section of the report outlines potential implementation steps to achieve the goals of the Strategic Plan. As the Community Plan process proceeds, City staff and community leaders will further define the priorities for implementation. Potential funding sources for the program are identified in the next section.

OBJECTIVES AND IMPLEMENTATION

GOAL: JOB DEVELOPMENT

The Westside has historically provided an excellent location for oil production support businesses as well as a wide variety of construction materials manufacturing and distribution firms. In recent years the local labor force has expanded to include many who are employed in technology sectors, much of which is located in Southern Santa Barbara County or Western Los Angeles County. The economic analysis prepared for the Strategic Plan identifies nearly 100 potential business targets in business sectors including information technology, services and industrial (see Appendix B). The Westside should provide sites and attractive development opportunities to support all these kinds of businesses.

Objective: Identify and designate sites that are compatible with development opportunities for technology businesses and professional services firms.

Implementation: Through the Westside and North Avenue Community Plan process, zone a total of at least 75 acres for business park development (see market analysis in Appendix B). This objective may also be implemented in part with mixed use zoning.

Implementation: Support the property owner initiated annexation process for business sites in North Avenue currently outside the City limits.

Implementation: Design and conduct a business marketing program to publicize the key attributes of a Westside location to the business community.

Implementation: Collaborate with Countywide, regional and statewide economic development organizations to heighten awareness among targeted industries about the characteristics of business sites in the Westside.

Objective: Designate suitable locations and development standards for industrial and service commercial businesses.

Implementation: Through the Westside and North Avenue Community Plan process, zone or maintain at least 200 acres for industrial and service commercial development (see market analysis in Appendix B).

Implementation: Establish cost-effective design standards that are conducive to operation of industrial businesses.

Implementation: Identify funding programs to assist property owners to screen industrial operations and avoid off-site visual impacts.

Objective: Support growth in educational services and facilities in the Westside and North Avenue.

Implementation: Support the annexation of the Brooks Institute site. Receive and act on Brooks Institute application to expand.

Implementation: Market the Westside and North Avenue as a focus for educational services, including possible satellite locations for Ventura Community College, University of California, the expanded Brooks Institute campus, employment training organizations/agencies and related ancillary services.

Objective: Collaborate with workforce training agencies and services programs to ensure local worker access to new jobs.

Implementation: Coordinate with CA Employment Development Department, the Ventura Workforce Investment Board, Regional Occupation Program, and other workforce training agencies to provide well-tailored employment training programs to meet the needs of businesses locating in the Westside and

resident workers seeking new employment opportunities.

GOAL: RETAIL AND COMMERCIAL SERVICES

Community quality is greatly affected by the availability of local services and retail shopping opportunities. The major planning studies for the area, including the revitalization plan and the urban design plan, as well as the General Plan itself, focus heavily on the opportunities to integrate commercial development into the neighborhood and into new residential development in a mixed use format. The market analysis in Appendix B identified retail demand for as much as 160,000 sq.ft. to 240,000 sq.ft., although much of this demand is currently satisfied by stores elsewhere in Ventura. The General Plan projects a more modest level of 60,000 sq.ft. of retail development throughout the Westside and North Avenue neighborhoods, but it is likely that as the job growth and residential development proceeds in the area, retail demand will accelerate in the future.

Objective: Promote expansion of local-serving retail and service businesses to improve shopping opportunities in the neighborhood and within the Study Area.

Implementation: Through the Community Plan process, designate locations for local-serving retail commercial businesses.

Implementation: Designate suitable sites for future growth retail commercial development to serve growth in Westside market demand.

Implementation: Review the design guidelines in the Housing Approval Program to ensure that the specifications for proximity to neighborhood shopping opportunities are viable in light of the limited commercial development potential in the neighborhood.

GOAL: WORKFORCE HOUSING

Compared to many areas in the region, the Westside has provided a beneficial supply of more affordable workforce housing, although prices have increased more steeply in

recent years. The General Plan focus on a mix and range of development to provide creative opportunities for a range of housing types providing high quality living environments. From an economic development standpoint, it is important to ensure that business owners and managers are attracted to the community as well. Business location decisions frequently hinge on the perception of community quality for the entrepreneurs themselves as well as for their workforce.

Objective: Promote development of housing opportunities commensurate with the incomes generated by local businesses, at both upper and lower income levels.

Implementation: Implement programs established in the Housing Element to provide affordable housing in the community.

Implementation: Support a balance of residential projects that seek to provide executive housing as a means to further encourage business owners to locate in the Westside.

Implementation: Encourage mixed use development to achieve a mix of housing types for a range of household income levels in the community.

GOAL: ARTS AND CULTURAL ACTIVITIES

In recent years, the Westside has seen a substantial expansion of artist workspaces as well as businesses that create and sell architectural elements and other public art component and supplies. Local merchants report that artists residing in the community represent an increasing market segment bolstering expansion of their sales. Moreover, the planned expansion of Brooks Institute provides the opportunity for a major expansion in photographic and motion picture development and ancillary businesses, of which many are in technology sectors.

Objective: Encourage the expansion of facilities and business opportunities for local artists.

Implementation: Identify locations for and support the development of work spaces for local artists, including live/work areas, venues for display of art, as

well as cultural performances, and business spaces for vendors that supply the local arts community, including the photography and motion picture arts and sciences taught at Brooks Institute. Encourage Brooks Institute to take a strong role in arts development in the community, including possibly offering scholarships to local residents and hosting or sponsoring arts and cultural events in the community.

GOAL: HIGHER VALUE LAND USES

The community is interested in creating high value job opportunities and in providing community amenities to improve the quality of the neighborhoods and commercial centers in the Westside. It is also important to improve the tax base in order to generate revenues to support a high quality of community services and public facilities.

Objective: Ensure a beneficial fiscal balance from market rate, private sector developments

Implementation: Although the City has not included a fiscal analysis in the scope of work for the Community Plan, as major development proposals come forward, the City may wish to evaluate the proposed land use mix for each project to ensure that it provides a reasonable fiscal balance between service costs and projected public revenues, and that it can generate sufficient funding capacity to provide a desirable level of public facilities and amenities.

Objective: Promote high quality project design while encouraging a balanced mix of development that provides residential and business opportunities at all economic levels.

Implementation: Evaluate proposed design standards from a financial feasibility perspective to ensure that they are efficient in creating quality development projects with reasonable cost consequences.

GOAL: SMART GROWTH & MIXED-USE DEVELOPMENT

The City's General Plan places significant emphasis on developments that incorporate Smart Growth principles. The Westside neighborhoods provide ample opportunity to implement these principles to create an exciting and vibrant community. Community character and overall urban design qualities are a major factor in successful business attraction and economic development and should be encouraged throughout the Westside area.

Objective: Integrate the General Plan policies regarding mixed-use development into the implementation of the economic development strategy. In particular, ensure that new business development projects contribute to building coherent, walkable neighborhoods.

Implementation:

Establish flexible form-based standards that create a conducive design environment for successful mixed-use development. In many cases this can provide a more effective incentive than other kinds of financial considerations. From an economic development standpoint, the critical aspect of mixed-use development is making the commercial portion of the project work. As the development codes for this land use designation are developed, the City needs to address several issues that commercial businesses face in regard to locating in mixed-use buildings:

- ? The residential portion of the project will not support the commercial businesses by itself; therefore, the commercial businesses need to be located where they can capture other market support. Traffic flows and visibility are critical to a successful commercial center.
- ? Construction costs for mixed-use buildings are often higher than for single-store commercial buildings, creating additional pressure on the market viability of the businesses. In today's market, the residential portion of the project should be able to carry the extra costs, but allowing for shared parking facilities may be another way of helping to reduce the project's overall costs.

- ? The residential and commercial components of the projects need to be compatible. Noise, lighting, and traffic flows can all create conflicts between businesses and residents. Residential product types that attract younger, smaller households may be better suited to co-locate with businesses that have the potential for higher noise and lighting impacts. In taller buildings, lower floors can be designated for studios while upper floors include larger units suitable for families.

GOAL: ENVIRONMENTAL QUALITY AND LIFECYCLE

PROJECT ECONOMICS

In the Community Workshops, residents expressed strong interest in seeing environmentally friendly businesses locate in the area. In the past, the City had studied the potential for an eco industrial park on the Westside, featuring alternative energy production as well as recycling industries. The market for those business concepts has not yet materialized, but much can be accomplished in terms of promoting environmentally supportive business practices and a wide variety of products and services that promote environmental quality.

Objective: Promote an environmentally friendly business base in the Westside.

Implementation: Target environmental and design industries in the Westside business development/attraction program.

Objective: Encourage development project designs that reflect environmental quality and consideration of long term benefit over short term gain.

Implementation: The City has incorporated environmental design principles into its development code. As further experience is gained with various approaches, the City may expand the range of building and site design options that are permitted in order to further reduce the environmental footprint of new development in the community.

POTENTIAL FUNDING SOURCES

1. REDEVELOPMENT

Redevelopment has had a long history not only in California but also in Ventura, as a means of financing and implementing downtown revitalization programs and other economic development efforts. Redevelopment is among the most commonly used and effective mechanisms, benefiting many economic development projects throughout California. Redevelopment should be seriously considered as one of the possible mechanisms for funding and implementing Westside improvements.

KEY FUNCTIONS OF A REDEVELOPMENT AGENCY

Redevelopment agencies typically engage in a wide variety of activities, all of which aim towards revitalizing deteriorating neighborhoods and business districts. These activities include establishing a Redevelopment project area, implementing the Redevelopment Plan, buying and selling property, making loans or grants, rehabilitating structures, constructing infrastructure and other public improvements, and developing and rehabilitating low and moderate income housing.

Three general powers differentiate redevelopment agencies from other public agencies.

- ? Buying and reselling private property
- ? Condemnation powers to acquire private property
- ? Financing the redevelopment program through collection of property tax increment

The “eminent domain” (or condemnation) powers are often the most controversial aspect of Redevelopment; however, Redevelopment authorities can place limits on when these powers are used, and some jurisdictions have dispensed with the condemnation powers altogether.

The tax increment financing aspect of Redevelopment is the most beneficial feature for economic development purposes.

Basically, tax increment diverts a portion of **future** property taxes generated within the specified Redevelopment district towards Redevelopment activities. The tax allocations received by the Redevelopment Agency are based only on incremental future increases in the assessed values. This works on the assumption that as a Redevelopment Agency invests in a project area, it will attract new private investment, which in turn will increase property values and tax revenues. There is no increase in tax rates for property owners, but the improved market value of the property generates more tax increment revenues. Tax increment provides the revenue source for a Redevelopment Agency to repay any debts that it incurs. Redevelopment also allows the City to receive a greater share of the taxes already being paid by Ventura residents and businesses. Currently, a large share of Ventura's property taxes goes to the County and a variety of other agencies that provide local and regional services. With the establishment of a Redevelopment Project Area, more of the future taxes paid by property owners would stay in Ventura and could potentially be used to fund public improvements in the Westside. There are fewer restrictions on the use of Redevelopment tax increment funds than there are with Community Development Block Grant (CDBG) program or other grant programs, as discussed further below.

The California Redevelopment Association (CRA) characterizes redevelopment financing as encompassing “three nos”:

- ? No new taxes
- ? No new assessments
- ? No new fees

Activities that redevelopment agencies can perform as part of economic development programs include business attraction, constructing new buildings, historic preservation, residential development, infrastructure and other public facility construction, and commercial, retail, and industrial development. Redevelopment agencies are subject to reporting requirements that include annual audits, an implementation plan, budget, and statement of indebtedness.

REDEVELOPMENT AGENCY AND DISTRICT FORMATION

The City of Ventura formed its Redevelopment Agency originally for purposes of administering the Downtown Redevelopment Project Area. In order to operate in the Westside area, the Redevelopment Agency would need to establish a new Project Area, and would need to certify that the Project Area meets required conditions of blight. Blight entails both physical and economic conditions, including unsafe and economically unviable buildings, incompatible uses, depreciated property values, high vacancy and/or turnover rates, lack of public infrastructure, lack of commercial facilities, or other conditions that endanger health or welfare. The stated purpose of Redevelopment is to eliminate these blighted conditions.

The process of adopting a Redevelopment Plan generally includes the following: scheduling, planning and financial analysis, community participation, document preparation, consultations with affected taxing agencies, and environmental review.

According to the CRA, factors that can shape the boundary of a proposed redevelopment area include the following:

- ? Existence of blight conditions
- ? Urbanization
- ? Goals and objectives for community development
- ? Number and location of residential dwelling units
- ? Development potential
- ? Adequacy of public improvements
- ? Right-of-way boundaries
- ? Political considerations

Once the boundary is determined, a feasibility study needs to assess the financial implications of the proposed Redevelopment Project Area. In addition, the feasibility study has documentation requirements that include a survey area resolution and map, preliminary plan, notices, resolutions, a redevelopment plan, and environmental impact

report. Overall, the process typically takes at least one year, but can take twice that long in more complicated situations.

2. BUSINESS IMPROVEMENT DISTRICTS

A business improvement district (BID) or property-based business improvement district (PBID) is a voluntary self-assessment mechanism that would provide funds that could help Ventura develop a more attractive and vibrant business district in the Westside and North Avenue. A BID or PBID typically funds enhancements such as security, maintenance, beautification, and marketing. Allowed under California law since 1994, BIDs and PBIDs have represented a private sector trend to make cities and towns more economically viable by creating revitalization.

Business improvement districts represent an innovative approach to the delivery of public services. (P)BIDs have traditionally been established by groups of local businesses and property owners. Funds to support (P)BIDs are raised in the form of additional taxes and/or fees for services in a particular geographic area. These funds are used to improve specific business areas through beautification efforts, increased maintenance, additional security, local promotion, special events, and other activities selected by the local (P)BID board to benefit the business district. The goal of the (P)BID activities is to attract customers, clients, visitors, and new businesses, to their business district.

While there are no set rules on what constitutes either a BID or PBID, there are some general guidelines that are used, and some basic differences between the two.

BID (BUSINESS IMPROVEMENT DISTRICT)

A BID is a self-help, self-taxing, **merchant-based** entity organized with the cooperation of local government. BIDs are renewed on an annual basis and merchants typically see their money go to work for them quickly. Typically, BIDs are used for smaller, more retail-oriented revitalization and economic development programs in downtowns and commercial corridors, including farmers' markets.

PBID (PROPERTY BASED IMPROVEMENT DISTRICT)

A PBID is **property-based** and is an assessment district within a geographically defined area. Proceeds from those assessments are used to provide services supplemental to those normally provided by municipal government. PBIDs have certain advantages over traditional BIDs in that they can raise funds by directly assessing property owners who have a long-term stake in the area's improvements. A PBID is usually established for up to five years and is often used for larger districts with higher budget requirements.

PBIDs are fairly easy to set up, especially when compared to the process involved in creating a new Redevelopment Project Area. In most cities, organizers just need to prove they have contacted every property owner within the proposed district. If a majority agrees, then each owner pays a special assessment on their property tax.

PBIDs are based upon the "benefit assessment district" concept, which provides for an assessment on commercial property to be raised within a specific geographic area. Proceeds from the assessment are used to provide services that benefit the district.

ATTRIBUTES OF (P)BIDS

Some of general characteristics of (P)BIDs include the following:

- ? A (P)BID allows a wide range of service options, including security, maintenance, marketing, economic development, and special events among others.
- ? Those who will pay the assessment have the opportunity to participate in its design and creation.
- ? It is governed by those who pay through a property and business owner advisory board that supervises operations and submits a yearly service plan.
- ? It is implemented by those who pay through a nonprofit, private sector, management organization.
- ? It is established through petition support from property owners who will pay the proposed property assessments.

- ? (P)BIDs are established for a set term determined by those who pay the assessment and must be reestablished by those who pay through a new petition process.

PROCESS OF FORMING A (P)BID

The general process to form a (P)BID takes from 9-12 months and consists of the following steps:

- 1. Creating the (P)BID Formation Infrastructure**
- 2. Consensus Building/Education**
- 3. Management Plan Development**
 - ? Improvements and activities—what will you do?
 - ? Budget—what will it cost?
 - ? Assessment Methodology—cost to individual properties.
 - ? Engineering Review of Assessment/Benefit Analysis—is it equitable?
 - ? Governance—who's in charge?
- 4. Plan Review/Consensus**
 - ? Plan Review Workshops
 - ? Leadership Consensus
 - ? Legal Review—compliance with City and State law
 - ? Final Plan and Assessment Methodology
- 5. Petition Campaign**
- 6. City Council Hearings/Ratification**
- 7. Contract for implementation of plan between City and Non-Profit Management Organization.**
- 8. Submit Assessments to County Assessor**

(P)BID PLAN

One of the most important elements of the (P)BID formation process is the development of the Management

District Plan. Those who pay the assessment develop the plan. The plan must be approved by the City Council based on recommendations provided by the Advisory Committee. The plan will generally include the following elements:

- 1. Location:** This section specifies the exact boundaries of the proposed district and any benefit zones within the district.
- 2. Improvements and Activities:** This section describes the actual service programs (maintenance, security, marketing, etc.) the District will provide.
- 3. Budget:** This section specifies the total District budget for the first year of operation, and may include budgets for the life of the District.
- 4. Method of Financing:** For property based improvement districts, the method of financing would be a levy of assessments on real property that benefits from improvements and activities provided by the District.
 - ? Assessment Methodology: This section describes the assessment variables (multiplier on assessed value, square footage, street front footage, ground floor or upper floor footage, etc.) that will be used to determine the assessment rates.
 - ? Cap: Specifies the limits that assessments may change each year and how that change will be determined (based on CPI rates, etc.).
- 5. Governance:** Describes the manner and form by which the district will be governed.
- 6. City Services:** Establishes the city contribution to the district, including the maintenance of the existing level of city services upon establishment of the new District.
- 7. District Formation:** Specifies the percentage of positive petitions (and ballots in California) that must be received from property owners and the process to collect the petitions.
- 8. Duration:** Specifies the term of the District (three-year, five-year, etc.)

9. District Rules: Define the operating rules as they relate to:

- ? Residential property
- ? Non-profit organizations
- ? District purchases
- ? Other district specific regulations

3. CALIFORNIA INFRASTRUCTURE AND ECONOMIC DEVELOPMENT BANK (I-BANK): INFRASTRUCTURE STATE REVOLVING FUND PROGRAM (ISRF)

Through the Infrastructure State Revolving Fund Program, I-Bank provides loans to cities, counties, redevelopment agencies, special districts, assessment districts, joint powers authorities, and non-profit corporations formed on behalf of a local government. This program uses a **competitive application process**. Loan funds may be used for projects in the following categories:

- ? City streets
- ? County and State highways
- ? Drainage
- ? Water supply and flood control
- ? Educational facilities
- ? Environmental mitigation measures
- ? Parks and recreation facilities
- ? Public transit
- ? Sewage collection and treatment
- ? Solid waste collection and disposal
- ? Water treatment and distribution
- ? Public safety facilities
- ? Power and communications facilities

4. ECONOMIC DEVELOPMENT ADMINISTRATION (EDA)

The U.S. Economic Development Administration (EDA) offers planning funds as well as grants and loans for infrastructure development associated with business and job growth. These funds are competitive and cannot replace the magnitude of redevelopment funds for Ventura, but they can provide a strategic incentive to assist certain business development projects. Through the Public Works Program, EDA makes grant funds available to states, cities, counties, higher education institutions, Indian tribes, and other political subdivisions for investments in water and sewer system improvements, industrial access roads, industrial and business parks, port facilities, railroad sidings, distance learning facilities, business incubator facilities, redevelopment of Brownfields, eco-industrial facilities, and telecommunications infrastructure improvements needed for business retention and expansion. The funds may be used for acquisition, rehabilitation, design and engineering, or improvement of public land or publicly-owned and operated facilities.

To apply for the funds, the applicant, or the county it is located in, must have a Comprehensive Economic Development Strategy (CEDS) approved by EDA. The City of Ventura is included in the Ventura County CEDS, which is currently being updated. The City's Economic Development Manager sits on the countywide CEDS committee and the Westside has been previously identified as a suitable location for EDA funded projects.

5. CA DEPARTMENT OF WATER RESOURCES (DWR): LOCAL WATER SUPPLY CONSTRUCTION LOANS

DWR provides loan funds for cities, counties, districts, and political subdivisions of California involved in water management to finance canals, dams, reservoirs, desalination facilities, groundwater extraction facilities, and other construction or improvement projects for water supply purposes. Applications are accepted on a continuous basis.

6. COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) PROGRAM

This program is funded by the Federal Government and is designed to provide decent housing opportunities, a suitable living environment, and economic opportunities in low/moderate income neighborhoods. Ventura receives these funds on an annual entitlement basis directly from the US Housing and Urban Development (HUD) and uses its funds primarily for infrastructure projects that benefit both residential neighborhoods and local businesses. Over the past ten years, the City has spent approximately \$3 million in the Westside on various street improvement projects, storm drains, and library operations.

7. CALIFORNIA STATEWIDE COMMUNITIES DEVELOPMENT AUTHORITY (CSCDA): STATEWIDE COMMUNITY INFRASTRUCTURE PROGRAM (SCIP)

The Statewide Community Infrastructure Program (SCIP) is a pooled funding vehicle for communities to finance infrastructure development prior to the collection of impact fees. The financing occurs through the issuance of 30-year tax-exempt bonds. The program seeks to reduce the need to construct projects incrementally as fees are paid.

Underwriting (credit analysis) of the development projects must occur, with entitlement completed. A lien is placed on the property, using current appraisals and a 3:1 value-to-lien ratio. There must be: no prior tax or bond delinquencies, clean property owner credit and title reports, a developer due diligence questionnaire completed, and the approval by an SCIP underwriter. There are two programs within SCIP.

The Impact Fee Prefunding Program finances impact fees up front in amounts large enough to fund the infrastructure construction necessary for development. Through this program, the City would need to partner with a developer. The City would then apply to SCIP to receive, up front, the total impact fees the developer will pay upon completion of his/her entire development. As development progresses and the developer pays the impact fees, the SCIP funds received are repaid.

The Impact Fee Reimbursement Program, as with the Prefunding Program, requires a developer to be on board. However, this program does not provide the impact fees up front. With the Reimbursement Program, the developer pays the impact fee out-of-pocket at the time of building permit issuance. The developer applies to SCIP to have the fees reimbursed.

To be eligible for these programs, the City must be a member of CSCDA. Membership is free and requires the adoption of a Resolution by the City Council. Communities interested in joining CSCDA can contact the organization to receive the Resolution and materials needed for reference and administration of the program.

The Prefunding Program would allow the City to construct larger portions of infrastructure at a time in conjunction with development projects. Because the program is relatively new, it remains largely untested. That does not mean that this program does not provide a useful financing vehicle for infrastructure development; it simply means that there could be complications associated with utilizing these funds that have not been identified because relatively few projects have actually utilized the programs.

8. STATE TRANSPORTATION IMPROVEMENT PROGRAM (STIP)

This program is allocated every two years and begins with the release of a proposed funding estimate in July of odd numbered years. The funds are allocated to on and off-highway transportation projects. Ventura should check with its regional transportation planning agency to ascertain the eligible activities that can be funded through this program. CalTrans and the regional transportation planning agencies prepare transportation improvement plans for submittal on December 15 of odd numbered years.

9. US ENVIRONMENTAL PROTECTION AGENCY (EPA): BROWNFIELDS ASSESSMENT, REVOLVING LOAN FUND, AND CLEANUP GRANTS

A number of development sites in the Westside and North Avenue are known, or anticipated, to have Brownfield issues.

EPA provides funds for assessments, Revolving Loan Funds for private developers to clean-up their sites, and grants for communities to fund publicly-owned site cleanup.

The EPA Brownfields Program is designed to enable communities and other stakeholders to work together in a timely manner to prevent, assess, safely clean up and sustainable reuse of brownfields. The Brownfields grants support revitalization efforts by funding environmental assessment, cleanup and job training activities.

The program began awarding funds in 2003 and has conducted three annual funding cycles. No information has been released about a 2007 funding cycle. Communities in California have obtained and utilized these national funds.

Within the program are four types of grants:

1. **Assessment Grants:** These can be up to \$200,000 per grant and can be site specific or a community-wide grant for multiple sites; they may also address contamination from a combination of sources. Local jurisdictions can also apply for a separate grant for petroleum-based contamination only.
2. **Clean-Up Grants:** May range up to \$200,000 per site for direct funding for cleanup activities at specific sites.
3. **Revolving Loan Fund:** These revenues provide funding to capitalize a revolving loan fund up to \$1,000,000 that provides sub grants to carry out assessment and/or cleanup activities at brownfields.
4. **Job Training Grants:** Provide funding up to \$200,000 for environmental job training projects -- To recruit, train, and place residents from brownfields-impacted communities in careers in the environmental field which in turn promotes the assessment, remediation, or preparation of brownfield sites for redevelopment.

Website information is: www.epa.gov/brownfields

10. CALTRANS

There are funding programs currently available through CalTrans focusing on environmental and safety improvements related to existing street infrastructure.

APPENDIX A: VENTURA WESTSIDE BUSINESS SURVEY SUMMARY OF RESULTS

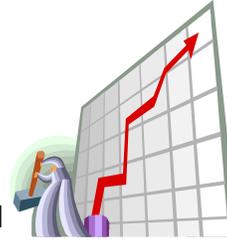
Business Survey Results

- Same location 3 years or more: 63%
- Single location - local ownership: 75%
- Intend to stay in current location: 69%
- Had recent sales growth: 62%
- Business in English & Spanish: 53%
- Rent space: 41%
 - Average rent = \$1,784
 - Average space = 3,529 square feet
- Businesses recruiting workers locally: 66%
- Businesses with websites: 33%
= 17% of business leads
- Average growth in full-time employees:
4.5 workers 7.5 workers

- Chamber of Commerce members: 6%

Westside Strengths:

- ◆ Transportation access
- ◆ Central location
- ◆ Business growth potential



Westside Weaknesses:

- ◆ Blight & maintenance
- ◆ High land & rent costs
- ◆ High housing costs

Actions to Improve Business Climate:

- Clean-up & maintenance of public areas
- Promoting City's image
- More business-friendly
- Informing businesses about public projects & services





CITY OF VENTURA WESTSIDE BUSINESS SURVEY

Thank you for taking the time to respond to this local business survey. This survey will serve as an important part of developing a strategic plan for the Westside of Ventura. The results for this survey will identify areas that would help improve business conditions for local businesses.

This survey will take about five to ten minutes to complete. If you need more space, attach additional sheets. When completed, please send it back in the attached preaddressed envelope sometime within the next 7 days. Individual responses will remain confidential.

If you have any questions regarding this survey please contact Alex Herrera at 654-7846.

CONTACT INFORMATION (Optional)

Company Name:

Contact/Title:

Address

City:

State:

ZIP Code:

Phone:

Fax:

E-mail address:

GENERAL INFORMATION

1. How long have you been in business at this location?
 - a) less than 1 year 6 11.8%
 - b) 1 to 3 years 7 13.7%
 - c) 3 to 5 years 6 11.8%
 - d) over 5 years (specify) _____ 32 62.7%

2. What type of business do you operate?
 - a) Sit-down restaurant 1 2.0%
 - b) Fast food/take out restaurant 0
 - c) Retail store (specify) 7 13.7%
 - d) Personal services (specify) 12 23.5%
 - e) Manufacturing (specify) 4 7.9%
 - f) Wholesale/distribution (specify) 3 5.9%
 - g) Professional services (specify) 13 25.5%
 - h) Mail order business with no storefront (specify) 1 2.0%
 - i) Other (specify) 7 13.7%

3. Is your business a unique establishment or part of a chain/franchise? (check all that apply)
- a) Unique establishment with one location 38 74.5%
 - b) Unique establishment with more than one location 7 13.7%
 - c) Regional chain/franchise 5 9.8%
 - d) National chain/franchise 0
 - e) Other (please indicate) _____
4. Where does the business owner live?
- a) City of Ventura 31 60.8%
 - b) Elsewhere in Ventura County 13 25.5%
 - c) Outside of Ventura County 5 9.8%
5. Which one of these applies to your business?
- a) Own the business space 13 25.5%
 - b) Lease/rent the business space 21 41.2%
 - c) This is a home-based business 13 25.5%
6. If you lease, what is your current monthly lease rate? \$1,784
7. If leasing your business space, how much time do you have left on your current lease?
- a) Lease on a month to month basis 6 11.8%
 - b) Less than 12 months 6 11.8%
 - c) Between 1 year and 3 years from now 4 11.8%
 - d) More than 3 years from now 4 11.8%
8. What is the size of your space? (in square feet) 3,529
9. Is there room for expansion in your current space?
- a) Yes 16 31.4%
 - b) No 26 51.0%
10. Besides English, in what other languages do you conduct business? (Check all that apply)
- a) Spanish 27 52.9%
 - b) Chinese
 - c) Japanese
 - d) Korean
 - e) Tagalog
 - f) Vietnamese
 - g) Other (specify) _____
11. Do you use a computer for your business?
- a) Yes 38 74.5%

b) No 11 21.6%

12. Does your business have Internet access?

a) Yes 36 70.6%

b) No 11 21.6%

SALES TRENDS AND BUSINESS PLANS

13. Which of the following characterizes your sales trends within the past three years?

a) Significant growth (more than 10% annual growth) 14 27.5%

b) Moderate growth (less than 10% annual growth) 14 27.5%

c) Minimal change 11 21.6%

d) Moderate decline (less than 10% annual decline) 1 2.0

e) Significant decline (more than 10% annual decline) 2 3.9%

f) Sales have generally fluctuated 2 3.9%

14. What are the primary reasons that you chose to locate your business in the Westside of Ventura instead of other locations? (check all that apply)

a) Acquired existing business already located in the Westside 6 11.8%

b) Access to customers 20 39.2%

c) Access to suppliers 2 3.9%

d) Freeway access 11 21.6%

e) Availability of business space 19 37.3%

f) Quality/suitability of business space 6 11.8%

g) Cost of business space 16 31.4%

h) Close to where employees live 6 11.8%

i) Close to where owners/executives live 15 29.4%

j) Incentives (specify) 1 2.0%

k) Local government assistance (specify) 1 2.0%

l) Other (specify) 8 15.7%

15. What are your business location intentions during the next three years? (Check the answers that best apply to your business)

a) Intend to continue operating at my current business location. 35 68.6%

b) Intend to move elsewhere in Ventura (specify) 2 3.9%

c) Expect a rent or lease price increase that will make it difficult to continue operating at this location 5 9.8%

d) Would like to expand the business but cannot expand at this site 5 9.8%

e) Would like to move to another Westside (Ventura) location but there is no suitable space 4 7.8%

f) Would like to move to another Westside (Ventura) location but costs are too high 3 5.9%

g) Would like to move to location elsewhere in Ventura but there is no suitable space 1 2.0%

h) Would like to move to location elsewhere in Ventura but costs are too high 2 3.9%

i) Might move out of Ventura 5 9.8%

j) Other (please indicate) 2 3.9%

16. If your business has considered relocating out of the Westside (Ventura), what were some of the reasons? (Check the answers that best apply to your business)
- a) Expect a rent increase that will make it difficult to continue operating at this location 4 7.8%
 - b) Would like to expand, but cannot expand at this site 5 9.8%
 - c) Would like to move to another Westside (Ventura) location, but there is no suitable space 5 9.8%
 - d) Would like to move to another Westside (Ventura) location, but costs are too high 2 3.9%
 - e) Would like to move elsewhere in Ventura, but there is no suitable space 1 2.0%
 - f) Would like to move elsewhere in Ventura, but costs are too high 2 3.9%
 - g) Business costs are too high 3 5.9%
 - h) Employee pool is too small 0
 - i) Other (specify) 4 7.8%
17. If your business has considered relocating out of Ventura, what other locations have you considered? (Check the answers that best apply to your business)
- a) Other city in Ventura County (specify) 6 11.8%
 - b) Santa Barbara County (specify) 3 5.9%
 - c) Other Southern California (specify) 1 2.0%
 - d) Other California (specify) 0
 - e) Outside of California (specify) 6 11.8%
18. If looking for a new business location, what type of space are you looking for?
- a) Retail space 2 3.9%
 - b) Industrial space 6 11.8%
 - c) Warehouse space 3 5.9%
 - d) Office space 4 7.8%
 - e) Other (specify) 6 11.8%
19. If looking for a new business location, how much space do you anticipate needing? (square feet)
15,135
20. In the past two years, has your business expanded
- a) Yes, my business has already expanded 18 35.2%
 - b) Yes, I plan to expand my business in the next _____ years (specify) 6 11.8%
- No, my business has not expanded and I have no expansion plans (explain why) 19 37.3%
21. If your business has expanded or plans to expand, what types of expansion have you completed or plan to complete?
- a) Physical expansion on same site 8 15.7%
 - b) New services and/or new retail products 5 9.8%
 - c) Relocation to different site 5 9.8%
 - d) Additional employees 10 19.6%
 - e) Other (specify) 5 9.8%

22. If your business has done or will do capital or other business improvements, what types of actions have you completed or plan to complete?

- a) Streamlined business practices 8 15.7%
- b) Increased use of technology 11 21.6%
- c) Interior remodeling 11 21.6%
- d) Facade improvement 10 19.6%
- e) Structural improvements 8 15.7%
- f) New equipment 16 31.4%
- g) Other (specify)

CUSTOMERS

23. Please identify your customer mix. Estimate to the best of your knowledge. There is no need to review any accounting records. (Total should equal 100 percent)

57.4 % Westside Ventura residents or businesses

24.7 % Other Ventura residents or businesses (specify) _____

19.7 % Residents and businesses from neighboring communities (Oxnard, Port Hueneme, Ojai Valley)

____ % Other Ventura County residents and businesses (specify) _____

____ % Santa Barbara County residents and businesses (specify) _____

____ % Los Angeles County residents and businesses (specify) _____

____ % Other Southern Calif. residents and businesses (specify) _____

____ % Other California

____ % Other U.S.

____ % International

____ % Overnight visitors to Ventura

____ % Other customers (specify) _____

100 % TOTAL

24. About what percentage of your customers are commuters who work in Ventura and live elsewhere?
14.7%

25. About what percentage of your customers are other businesses? 48.8%

BUSINESS PROMOTION

26. Which of the following do you use to promote your business? (Check all that apply)

- a) Word of mouth 43 84.3%
- b) Brochures 11 21.6%
- c) Mailers 14 27.5%
- d) Advertise in newspaper (specify) 11 21.6%

- e) Radio ads (specify) 6 11.8%
- f) Television ads (specify) 0
- g) Phonebook ads 19 37.3%
- h) Trade shows 7 13.7%
- i) Internet 11 21.6%
- j) Chamber of Commerce events 2 3.9%
- k) Event sponsorships (specify) 3 5.9%
- l) Other (please indicate) 7 13.7%

27. Does your business have a Web site?

- a) Yes 17 33.3%
- b) No 32 62.7%

If yes, about how much of business is generated through Internet sales/leads? 16.5%

If no, would you like to have a Web site?

- a) Yes 7 13.7%
- b) No 8 15.7%

28. Are you currently a member of the Chamber of Commerce? N=47

- a) Yes 3 6.4%
- b) No 44 93.6%

If no, why not?

- a) Not enough time 8
- b) High expense 5
- c) Not enough value for the money 15
- d) Other (specify) 16

WORKFORCE

29. How many employees currently work at this location (annual average) and how many do you expect two years from now?

	Two Years Ago	Now	Two Years From Now
Full Time	4.5	7.5	9.5
Part Time	1.2	1.6	2.1
Temporary			

30. What percentages of your current employees at this location live in the area? You do not need to check your employment records – just fill out to the best of your knowledge. (Total should equal 100 percent)

69.7 % Ventura Westside

_____ % Other Ventura neighborhoods

- _____ % Neighboring communities (Oxnard, Port Hueneme)
- _____ % Highway 33 corridor (Ojai Valley)
- _____ % Other Ventura County (specify) _____
- _____ % Santa Barbara/Goleta
- _____ % Other Santa Barbara County
- _____ % Los Angeles County (specify) _____
- _____ % Other (specify)
- 100 % TOTAL

31. Are you able to recruit the skilled workforce you need locally?

- a) Yes 23
- b) No 13

Comments

32. Does a lack of affordable housing affect your ability to attract workers?

- a) Yes 16
- b) No 21

Comments

BUSINESS CLIMATE ISSUES

33. What are the primary strengths of the Ventura Westside as a place to do business? (Check all that apply)

- | | |
|---------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <input type="checkbox"/> Central location 27 | <input type="checkbox"/> Commitment of local government to solve problems 4 |
| <input type="checkbox"/> Transportation access 31 | <input type="checkbox"/> Diverse and healthy local economic base 3 |
| <input type="checkbox"/> Access to markets and consumer spending 13 | <input type="checkbox"/> Land costs/rents 16 |
| <input type="checkbox"/> High local income 5 | <input type="checkbox"/> Housing costs 6 |
| <input type="checkbox"/> Diverse ethnic population 17 | <input type="checkbox"/> Arts presence 7 |
| <input type="checkbox"/> Shopping opportunities and local service businesses 12 | <input type="checkbox"/> Public services (recreation activities, parks and library) 5 |
| <input type="checkbox"/> Tourism spending 3 | <input type="checkbox"/> Community involvement 7 |
| <input type="checkbox"/> Spending from commuters 4 | <input type="checkbox"/> Schools 7 |
| <input type="checkbox"/> Large daytime worker population 5 | <input type="checkbox"/> Area growth potential 21 |
| <input type="checkbox"/> Strong presence of other businesses 15 | <input type="checkbox"/> Quality of life 12 |
| <input type="checkbox"/> Work force availability 6 | <input type="checkbox"/> Other (specify) 4 |
| <input type="checkbox"/> Quality of local labor force 4 | _____ |
| <input type="checkbox"/> General business climate 12 | _____ |
| <input type="checkbox"/> Quality of business spaces 7 | |

34. What are the primary weaknesses of the Ventura Westside as a place to do business? (Check all that apply)

- | | |
|-------------------------------------------------------------------------------|----------------------------------------------------------|
| <input type="checkbox"/> Distance from markets 2 | <input type="checkbox"/> Blight and area maintenance 21 |
| <input type="checkbox"/> Distance from supplier businesses 7 | <input type="checkbox"/> High land costs/rents 19 |
| <input type="checkbox"/> Small market size 11 | <input type="checkbox"/> High housing costs 15 |
| <input type="checkbox"/> Local business regulations 10 | <input type="checkbox"/> Lack of arts presence 2 |
| <input type="checkbox"/> Shopping opportunities and local business services 3 | <input type="checkbox"/> Lack of recreation activities 8 |
| <input type="checkbox"/> Transportation access 1 | <input type="checkbox"/> Lack of growth potential 3 |
| <input type="checkbox"/> Lack of exposure/high profile 8 | <input type="checkbox"/> Business vacancies 7 |
| <input type="checkbox"/> Problems with local government 6 | <input type="checkbox"/> Community apathy 7 |
| <input type="checkbox"/> Work force availability 4 | <input type="checkbox"/> Education 4 |
| <input type="checkbox"/> Quality of local labor force 8 | <input type="checkbox"/> Quality of life 6 |
| <input type="checkbox"/> Transportation access 0 | <input type="checkbox"/> Other (specify) 7 |
| <input type="checkbox"/> General business climate 7 | |
-
-

35. In what areas should Ventura take action to improve the business climate? (Check up to five of the most important responses)

- Permit assistance 17
 - Clean-up and maintenance of public areas 34
 - Business taxes (compared to other locations) 6
 - Promote the city's image 20
 - Financing 10
 - Improving the quality of the labor force 7
 - More available retail business space 7
 - Better inform businesses about public projects and services 17
 - Education/job training 13
 - Increase cultural arts initiatives 7
 - More business friendly 20
 - More sensitive to the needs of ethnic minority business owners 13
 - Develop more park and recreation facilities/programs 14
 - Develop workforce housing 12
 - Other (specify) 6
-
-

OPINIONS ABOUT VENTURA'S FUTURE

36. What urgent problems facing your business, if any, might compel you to relocate or close?

37. Is there anything that city government can do to assist your business and ensure that you remain in Ventura?

- a) Yes
- b) No

If yes, what can be done? (specify)

38. Are there any suppliers, vendors, or other businesses located outside Ventura that would help your business if they were closer?

- a) Yes
- b) No

If yes, what types of suppliers would you like to see located closer to Ventura? (specify)

This concludes the survey. Please return the survey in the enclosed business reply envelope.

Thank you very much for participating!

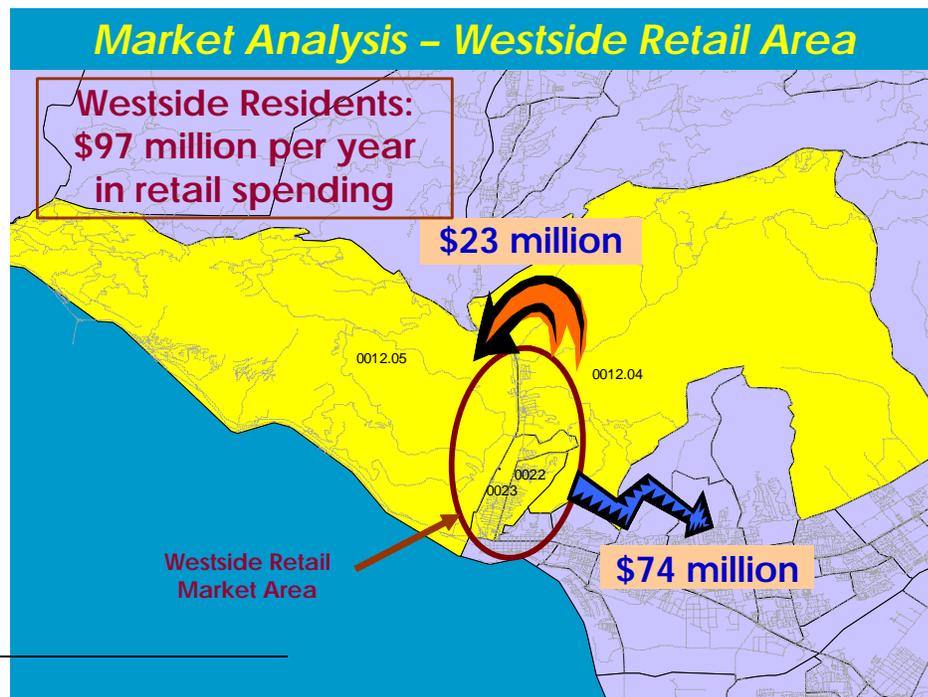
APPENDIX B: ECONOMIC ANALYSIS

RETAIL MARKET ANALYSIS

The retail market analysis addresses the potential for local serving retail businesses in the Westside and North Avenue Areas. The analysis also considers citywide retail supply and demand, which connects the Westside to commercial centers throughout the City.

Market Area

The local market area includes primarily the Westside and North Avenue areas (Study Area), but a secondary market area also extends northward to include Casitas Springs and the areas up to the edge of Ojai (see Map).¹ There are an estimated 4,192 households in the primary Westside market area and 1,190 households in the secondary market area north of Canada Larga.²



¹ As the map indicates, the census tracts that include the Westside also include large tracts in the hills east and west of Ventura Avenue. However, little or no population exists in those areas.

² Estimated by ADE based on 2000 census data and 2055 population estimates by the CA Dept of Finance.

Demand and Supply

Currently, the market area supports \$97 million in spending power but only captures \$18.6 million in sales (Table B-1). Supportable store types include apparel and shoes, drug and proprietary, grocery store, restaurants, home furnishings and appliances, and a variety of specialty stores. The 2005 Ventura General Plan predicts development of another 1,342 units in the Westside, including North Avenue. In considering future retail spending potential, nearly 700 additional units were added to reflect current plans for the Brook Institute Expansion. The current demand, coupled with this level of growth, would support 160,000 sq.ft. of additional commercial development (Table B-2). With future growth, this retail development could expand to more than 243,000 sq.ft.

These projections must be tempered by acknowledging that much of the unmet demand on the Westside and North Avenue is served by stores elsewhere in the City of Ventura. Table B-3 shows the citywide supply and demand situation and it is quite different than the conditions found on the Westside and North Avenue. City of Ventura residents have an estimated retail demand of about \$845 million, while retail stores in Ventura achieve \$1.9 billion in sales. The difference is due to a substantial capture of retail spending from non-City residents, which include residents of other cities in the County, in-commuting employees, tourists and other visitors to the City. The only leakages Ventura has are sales in discount stores and warehouse clubs, along with a minor leakage in men's apparel.

Therefore, from a citywide perspective at this point in time, the retail development opportunities that would make the most sense are those that would have primarily a local, neighborhood serving function. The General Plan predicts growth of 67,086 sq.ft. in retail development. The retail targets that fit best with the supply/demand analysis completed for this study would include the following:

- ? Groceries
- ? Drug Store

- ? Restaurants
- ? Family Clothing
- ? Furniture/Home Furnishings
- ? Neighborhood Services

INDUSTRIAL/OFFICE MARKET ANALYSIS

Target Industry Analysis

Employment in Ventura County grew at a healthy rate of 4.3% between 2001 and 2004 (most recent detailed data available). Employment in Santa Barbara County grew 2.2% during this same period while the number of jobs in LA County declined by 1.3%.

The top 100 industrial and office based businesses (excluding health care and local-serving services), created more than 20,000 jobs during this period, while total job growth in the County was just over 10,000 (other industries declined). This list shown, in Table B-4, includes a wide range of manufacturing industries ranging from chemical products, metal products, machinery, electrical products and electronics, as well as motor vehicle and aircraft parts. There was also significant growth in wholesale trade and trucking operations.

In terms of office based businesses, significant growth occurred in financial services, management and technical consulting services, corporate headquarters, education, arts and entertainment, and computer and office machine repair, among others.

Similar lists are shown in Tables B-5 and B-6 for Los Angeles and Santa Barbara counties. This also includes a more focused geographic analysis of southern Santa Barbara County and western Los Angeles County. At this level of geography, detailed employment figures are not available; however, the US Census track numbers of firms by zip code, as shown in Tables B-7 and B-8.

In southern Santa Barbara, there was substantial growth in the number of firms engaged in architecture, scientific and

technical consulting, custom computer programming, marketing consulting, motion picture and video consulting, periodical publishers and a variety of related business activities. There was some growth in manufacturing industries, particularly in computer and technology sectors, such as electro medical and electrotherapeutic apparatus.

In Los Angeles County there has been tremendous growth in the motion picture industry, with more than 42,000 jobs created between 2001 and 2004. Some of this growth has occurred in proximity to Ventura County, with 52 new firms in motion picture and video production in the Agoura Hills, Calabasas Westlake Village area between 1998 and 2003. In addition, there were nine new firms in this area in teleproduction and other post production services, as well as six new media representatives firms.

Other strong growth sectors in the far western portion of LA County include custom computer programming, computer systems design services, data processing, and a variety of other technical and professional consulting services.

This analysis generated a list of potential business development targets for the Westside (see Table B-9). These businesses may be grouped into three broad categories: information technology, service businesses and industrial businesses. The first two groups of businesses tend to occupy office space, business parks and educational facilities, while the third group generally requires industrial building space. The list below provides a few representative business examples in each group.

? Information Technology

- Photography and motion pictures
- Software
- Computer systems design
- Research and Development
- Art

? Service Businesses

- Environmental consulting
- Architecture and engineering
- Telephone call centers and service s=centers

- Laboratories

- ? Industrial Businesses
 - Construction materials mfg and dist.
 - Machinery mfg and dist
 - Printing and photography supplies
 - Medical instruments mfg
 - Uniform supply
 - Wholesale distribution

A Note on Non-Residential Real Estate Trends

The UCSB Economic Outlook for 2006 reports that the industrial market in Ventura County saw solid leasing activity in the past year, but is coming under pressure from rising construction costs and reduced land availability. To the extent that the City can work with property owners in the Westside and North Avenue to convert outmoded industrial properties to modern facilities at a reasonable cost, the Westside and North Avenue areas can continue to be a viable industrial location.

The office market vacancies dipped to single digits in the past year, while demand from the high end of the market drove increases in lease rates. Less desirable space remained unleased, suggesting that quality is an important consideration for business park development in the Westside and North Avenue. The short term focus should be on smaller scale office spaces conducive to small business development and attraction in the Westside and North Avenue.

Job Development Potential

In 2002, the Westside Revitalization Plan estimated there were more than 9,100 jobs in the Westside. The Plan recommended a land use scenario that would increase the potential employment in the area by more than 11,000 jobs (Table B-10). In order to build out at this level, the Westside would need to grow at 4% per year for more than 20 years. As discussed above, the County has seen 4% growth for the past several years, and even over the long term sustained employment growth has been about 3.5%. The 2005 General Plan, however, did not incorporate the job development

recommendations from the Revitalization Plan, but predicts instead about 750,000 sq.ft. of retail, office and industrial development in the Westside, which we estimate would support growth of more than 1,400 jobs (Table B-10).

As part of the economic analysis for this study, we have projected development scenarios for six catalyst sites, also shown in Table B-10. Some of these sites, such as the Selby site and the USA Petroleum site (sites 1 and 5) probably have strong potential to redevelop over the short term. Others, such as sites 3 and 4 are longer-term opportunities since the existing oil production uses are likely to continue for some time.

Site 6 is largely dependent on the Brooks Institute expansion and development of Site 5, so it represents more of a medium term opportunity (5-10 years). Site 6 is currently adjacent to the City Sphere of Influence (SOI) on both the western and eastern sides of Ventura Avenue & Hwy 33. The General Plan recommends that the western portion be included in the next Sphere update, the eastern portion would also have to be included before it's economic development potential could be realized.

A brief description of each site is provided below.

1. Selby (Rocklite and Ventura Avenue)

This site is about 25 acres and is owned by the Selby Family. Although it is designated for industrial use in the General Plan (with an overlay along the Ventura Avenue Corridor) its key feature is its Gateway location as Stanley Avenue intersects Ventura Avenue east of the freeway. As a catalyst for development and renewal in this immediate area, the site would perform better with a higher value mix of uses. We recommend a mix of ground floor commercial on Ventura Avenue with second and/or third story office above. The eastern portion of the property could support high density residential uses to create a true mixed use development that would be a showcase for travelers as they exit the freeway at Stanley. In terms of economic development potential, we project about 27,000 sq.ft. of retail and 54,000 sq.ft. of office (Table B-10).

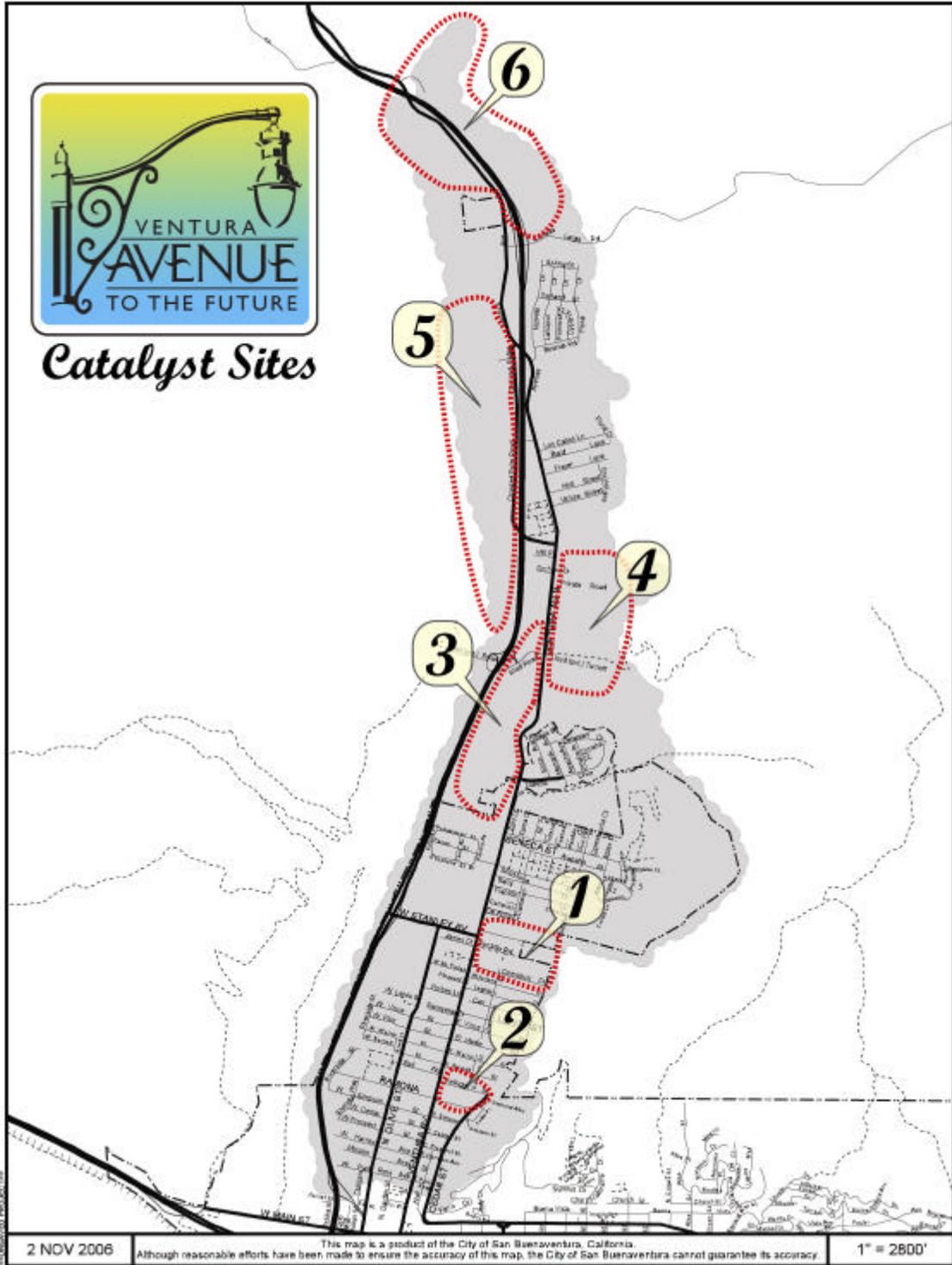


Figure 2

2. Kellogg (Kellogg east of Ventura Avenue)

This small, two-acre site is formerly an industrial use but is now designated for commercial and residential uses in the Ventura Avenue Corridor. It fronts onto Ventura Avenue but also backs up to residential uses along its northern and eastern edges. This site is in proximity to existing artists studios and similar businesses and would be a good site to implement the City's goals of encouraging further development of artistic and cultural activities in the area. We recommend the City consider a live/work development oriented to artist lofts, with perhaps neighborhood services as part of the mix along Ventura Avenue if space permits.

3. School District/AERA (West Ave./Shell Rd.)

This is a large, 90-acre site that supports a variety of light industrial uses and oil production. The Ventura School District has an old school site that occupies the southernmost 4-5 acres of this site. The School District is interested in considering a mixed use development in its property, which could provide a transition between long term industrial uses to the north and the newer residential and commercial uses to the south. We would recommend that the bulk of this property remain industrial, hopefully as a receiving site for service commercial and industrial businesses that relocate from other parts of the Avenue as new development increases real estate prices. If fully developed, 85 acres in this site could support more than 620,000 sq.ft. and 800 industrial and service commercial jobs (Table B-10).

4. AERA (East Avenue/Shell)

This site is also about 90 acres but it is almost entirely devoted to current oil production operations. It is not anticipated that this site would be available for other development in the near future, but we recommend the City also maintain the industrial zoning on this site for future relocation of industrial and service commercial businesses as well as attraction of new targeted industries.

5. USA Petroleum (West Upper Avenue)

As the site of the discontinued refinery, this site could support future industrial uses as well, but its key feature in

current market terms is its proximity to the Brooks Institute campus, which is planning a major expansion. The Brooks expansion is perhaps the most significant short term economic development opportunity for the Westside in that it can create a substantial concentration of education and technical support activities centered on photography and film production. In order for the expansion to realize its full economic development potential, however, it will be necessary to add housing adjacent to the campus. Therefore, plans are developing for residential development on the northern portion of the USA site, with the southern portion devoted to business park uses, which can provide a transition between the residences and the industrial uses further south. These concepts are entirely consistent with our market research, which shows substantial potential for information technology businesses in the Westside as well as a variety of professional services that would seek office space rather than industrial spaces.

6. Bonsall (North of Canada Larga)

These two properties, east and west of the freeway and immediately north of the City water treatment plant and the Canada Larga interchange, represent a logical extension of the neighborhood center created by the Brooks campus. The freeway access and Ventura Avenue frontage would permit commercial mix use development on the western portion of the property while the eastern side of the highway could support additional business park uses and possibly multifamily/live work residential uses supporting the Brooks Campus area. Both of these sites are currently adjacent to the City Sphere of Influence (SOI), and the General Plan recommends that the western property be included in the next Sphere update. The eastern property is outside the City's planning area as well as its SOI but within the City's Area of Interest. The economic development potential of these sites in the short term is dependent on the implementation of the Brooks expansion. Even with that, the USA Petroleum site would have a more immediate effect in support of the campus expansion. However, if Brooks' plans move forward, it would be in the City's interest to plan for business development on the Bonsall sites to complete the northern edge of the Westside job center.

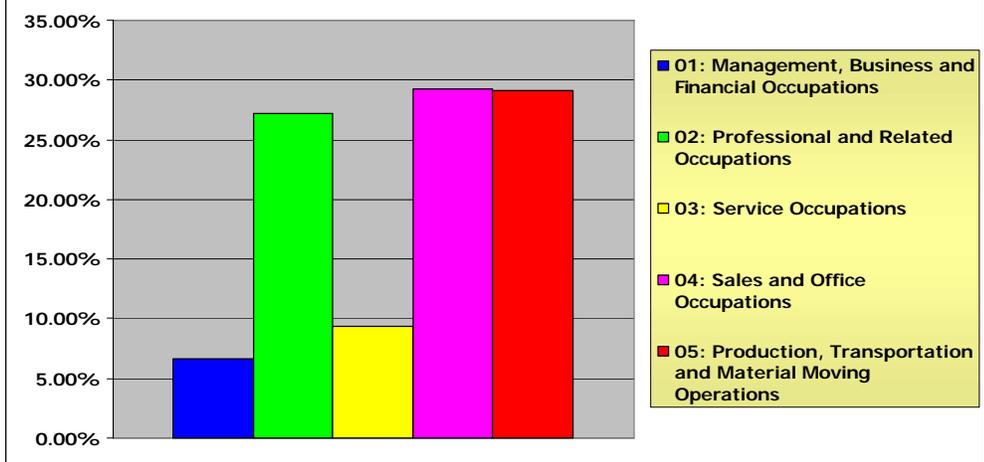
The employment estimates for these sites in Table B-10 indicate a potential of nearly 4,000 jobs, but there are other opportunities not included in the Table. For example, this does not include the potential employment increase on the Brooks Institute site itself, which may include ancillary film production businesses in addition to the Brooks faculty and staff workforce. Also, planning is underway for other sites in the Westside, which will also include new job growth. It appears from this analysis that the upcoming Westside and North Avenue Community Plan project may need to consider additional job development potential than what was predicted in the General Plan.

Job Quality

One of the major goals expressed in the workshops for the Economic Strategic Plan is to create jobs that are well-suited to the local labor force in Ventura and represent career path opportunities that are attractive and sustainable in the long term. We have prepared a projection of occupational demand for the potential Westside Industry targets listed above in Table B-9. This is shown in Figure 2, and may be compared to the 2000 Census occupational distribution shown in Figure 3. Although the job categories have changed slightly, there is a very good correspondence between the skills found in the local labor force and those needed by potential new businesses that can be attracted to the Westside and North Avenue.

FIGURE 2

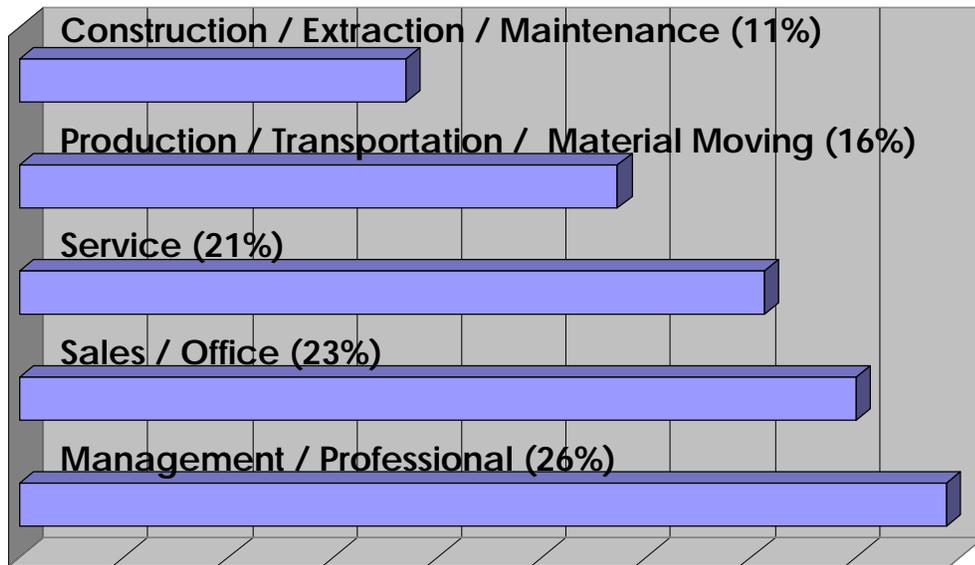
Occupational Distribution in Target Industries 2002 Occupational Distribution in Target Industries



Source: California Employment Development Department, Labor Market Information Division; Calculations by Applied Development Economics

FIGURE 3

Westside Occupations*



CONCLUSION

The proposed expansion of Brooks Institute in the North Avenue area would create an important focal point for the development of creative arts, photographic and motion picture arts, and a host of related technical disciplines that are present and growing in Southern Santa Barbara County and Western LA County.

Secondly, a conducive business environment could be created in the Westside and North Avenue to support small business development in a variety of office based sectors such as scientific and technical consulting, software and data processing, computer systems design, and a variety of business services.

Having noted these opportunities for change in the business mix in the Westside, we also note that the market is currently very strong for the manufacturing and construction related firms already located in this area. Construction is one of the leading growth industries in Ventura County and interviews with existing firms in the area indicate that the Westside and North Avenue is a very good location for construction materials distributors, as well as construction related services such as engineering and equipment serving and repair.

As the Westside transitions certain sites and sub areas into residential, commercial and office uses, portion of the area needs to be reserved for these traditional sectors of the local economic base.

TABLE B-1

Retail Group	Westside Study Area Household Spending	Secondary Market Area Spending	Total Market Area Retail Spending	Taxable Sales	Total Retail Sales	Sales Leakages
Total	\$72,359,474	\$24,388,014	\$96,747,488	\$18,594,000	\$22,757,015	\$73,990,472
Apparel Store Group	\$3,846,432	\$1,330,794	\$5,177,227	\$106,000	\$106,000	\$5,071,227
Women's Apparel	\$853,479	\$296,307	\$1,149,786	\$500	\$500	\$1,149,286
Men's Apparel	\$294,827	\$105,826	\$400,653	\$8,900	\$8,900	\$391,753
Family Clothing	\$1,907,102	\$663,170	\$2,570,272	\$96,600	\$96,600	\$2,473,672
Shoe Stores	\$791,023	\$265,491	\$1,056,515	\$0	\$0	\$1,056,515
General Merchandise Group	\$13,657,617	\$4,562,970	\$18,220,587	\$164,200	\$174,867	\$18,045,720
Department Stores/Other General Merchandise	\$7,095,097	\$2,438,026	\$9,533,123	\$0	\$0	\$9,533,123
Discount Stores	\$4,275,975	\$1,456,129	\$5,732,104	\$0	\$0	\$5,732,104
Department Stores	\$2,819,083	\$981,884	\$3,800,967	\$0	\$0	\$3,800,967
Other General Merchandise	\$3,687,204	\$1,220,823	\$4,908,026	\$164,200	\$174,867	\$4,733,160
Warehouse Clubs and Superstores	\$2,810,428	\$920,578	\$3,731,006			
Misc. General Merchandise	\$876,776	\$300,244	\$1,177,020			
Drug & Proprietary Stores	\$2,875,316	\$904,122	\$3,779,438	\$0	\$0	\$3,779,438
Specialty Retail Group	\$4,380,792	\$1,514,786	\$5,895,577	\$758,600	\$763,305	\$5,132,272
Gifts & Novelties	\$327,448	\$112,876	\$440,323	\$60,800	\$61,601	\$378,723
Sporting Goods	\$485,410	\$179,846	\$665,256	\$256,700	\$256,957	\$408,299
Florists	\$131,235	\$43,690	\$174,925	\$4,100	\$4,121	\$170,804
Photographic Equipment	\$63,041	\$23,521	\$86,562	\$0	\$0	\$86,562
Records & Music	\$232,434	\$81,801	\$314,235	\$67,800	\$67,800	\$246,435
Books & Stationery	\$397,743	\$138,004	\$535,747	\$0	\$0	\$535,747
Office Supplies/Computer Equipment	\$580,784	\$203,039	\$783,823	\$70,600	\$70,600	\$713,223
Office Supplies	\$282,607	\$98,268	\$380,875			
Computer Equipment	\$298,177	\$104,772	\$402,948			

Retail Group	Westside Study Area Household Spending	Secondary Market Area Spending	Total Market Area Retail Spending	Taxable Sales	Total Retail Sales	Sales Leakages
Jewelry	\$335,734	\$124,609	\$460,343	\$0	\$0	\$460,343
Misc. Specialty Retail	\$1,826,963	\$607,400	\$2,434,363	\$298,600	\$302,227	\$2,132,136
Cosmetics/Beauty Supply	\$128,568	\$40,365	\$168,933			
Optical Goods	\$274,672	\$93,206	\$367,878			
Other Health/Personal Care Stores	\$241,114	\$75,221	\$316,335			
Toys & Hobbies	\$454,482	\$157,164	\$611,646			
Pet Stores	\$299,629	\$99,661	\$399,290			
Other Misc. Specialty Stores	\$428,499	\$141,782	\$570,281			
Food, Eating and Drinking Group	\$19,275,565	\$6,267,970	\$25,543,535	\$5,680,200	\$9,412,471	\$16,131,064
Grocery Stores	\$12,391,724	\$3,956,929	\$16,348,653	\$1,268,000	\$4,735,231	\$11,613,422
Supermarkets	\$11,860,167	\$3,788,664	\$15,648,831	\$1,235,100	\$4,678,409	\$10,970,422
Convenience Stores	\$531,548	\$168,261	\$699,809	\$32,900	\$56,822	\$642,987
Specialty Food Stores	\$378,065	\$120,877	\$498,943	\$33,100	\$57,168	\$441,775
Meat & Fish Markets	\$189,048	\$60,405	\$249,452			
Fruit & Vegetable Markets	\$73,368	\$23,447	\$96,816			
Misc. Specialty Food	\$115,649	\$37,026	\$152,675			
Liquor Stores	\$577,814	\$194,928	\$772,742	\$2,617,800	\$2,663,072	(\$1,890,330)
Eating Places	\$5,927,961	\$1,995,236	\$7,923,197	\$1,761,300	\$1,957,000	\$5,966,197
Full-Service Restaurants	\$2,827,320	\$953,525	\$3,780,845			
Other Eating Places	\$2,874,513	\$961,130	\$3,835,643			
Drinking Places	\$226,128	\$80,581	\$306,709			
Building Materials And Home Furnishings Group	\$6,460,223	\$2,355,495	\$8,815,718	\$2,274,300	\$2,275,991	\$6,539,727
Furniture & Home Furnishings	\$2,413,204	\$894,877	\$3,308,081	\$7,300	\$7,315	\$3,300,767
Furniture Stores	\$1,607,034	\$601,319	\$2,208,353			
Other Home Furnishings Stores	\$806,170	\$293,558	\$1,099,728			
Household Appliances & Electronics	\$1,194,128	\$420,810	\$1,614,938	\$0	\$0	\$1,614,938
Used Merchandise	\$168,056	\$59,132	\$227,188	\$49,900	\$49,900	\$177,288

Retail Group	Westside Study Area Household Spending	Secondary Market Area Spending	Total Market Area Retail Spending	Taxable Sales	Total Retail Sales	Sales Leakages
Nurseries & Garden Supply Stores	\$669,732	\$222,028	\$891,760	\$0	\$0	\$891,760
Lumber & Other Building Materials	\$1,195,037	\$459,099	\$1,654,136	\$542,700	\$542,700	\$1,111,436
Home Centers and Hardware Stores	\$777,126	\$284,145	\$1,061,272	\$1,674,400	\$1,676,076	(\$614,804)
Paint & Wallpaper	\$42,939	\$15,404	\$58,343	\$0	\$0	\$58,343
Automotive Group	\$24,738,845	\$8,355,999	\$33,094,844	\$9,610,700	\$10,024,382	\$23,070,462
New Cars & RVs	\$16,193,097	\$5,539,489	\$21,732,587	\$0	\$0	\$21,732,587
Used Car Dealers	\$1,174,920	\$401,186	\$1,576,106	\$51,900	\$51,900	\$1,524,206
Gasoline Service Stations	\$6,469,273	\$2,104,288	\$8,573,561	\$5,029,500	\$5,443,182	\$3,130,379
Mobile Homes & Trailers	\$4,126	\$1,494	\$5,620	\$2,862,300	\$2,862,300	(\$2,856,680)
Auto Parts & Accessories	\$459,604	\$150,696	\$610,301	\$1,567,900	\$1,567,900	(\$957,599)
Other Vehicles	\$437,824	\$158,846	\$596,669	\$99,100	\$99,100	\$497,569

TABLE B-2

Retail Group	Study Area Sales Leakages	Current Supportable Sq. ft.	Future Leakage	Future Supportable Sq. ft.
Total	\$73,990,472	160,838	\$99,147,990	243,472
Apparel Store Group	\$5,071,227			
Women's Apparel	\$1,149,286	4,564	\$1,525,851	6,059
Men's Apparel	\$391,753	1,617	\$521,834	2,154
Family Clothing	\$2,473,672	7,846	\$3,315,108	10,515
Shoe Stores	\$1,056,515	4,711	\$1,405,523	6,267
General Merchandise Group	\$18,045,720		\$24,071,619	
Department Stores/Other General Merchandise	\$9,533,123		\$12,663,561	
Discount Stores	\$5,732,104		\$7,618,714	
Department Stores	\$3,800,967		\$5,044,779	
Other General Merchandise	\$4,733,160		\$6,359,997	
Warehouse Clubs and Superstores	\$3,731,006		\$4,970,999	8,384
Misc. General Merchandise	\$1,177,020		\$1,563,864	8,140
Drug & Proprietary Stores	\$3,779,438	7,513	\$5,048,061	10,035
Specialty Retail Group	\$5,132,272		\$7,065,128	
Gifts & Novelties	\$378,723	1,881	\$523,196	2,599
Sporting Goods	\$408,299	1,972	\$622,468	3,006
Florists	\$170,804	642	\$228,706	860
Photographic Equipment	\$86,562	206	\$114,376	273
Records & Music	\$246,435	1,056	\$348,987	1,495
Books & Stationery	\$535,747	3,327	\$711,236	4,417
Office Supplies/Computer Equipment	\$713,223	2,110	\$969,472	2,869
Office Supplies	\$380,875		\$505,564	
Computer Equipment	\$402,948		\$534,507	
Jewelry	\$460,343	722	\$608,473	955
Misc. Specialty Retail	\$2,132,136	6,742	\$2,938,214	9,291
Cosmetics/Beauty Supply			\$56,726	
Optical Goods			\$121,188	
Other Health/Personal Care Stores			\$106,382	
Toys & Hobbies			\$200,523	
Pet Stores			\$132,200	
Other Misc. Specialty Stores			\$189,059	
Food, Eating and Drinking Group	\$16,131,064		\$24,635,666	
Grocery Stores	\$11,613,422	33,181	\$17,080,794	48,802
Supermarkets	\$10,970,422	27,282	\$16,203,265	40,295
Convenience Stores	\$642,987	1,959	\$877,512	2,673
Specialty Food Stores	\$441,775	1,074	\$608,582	1,480
Meat & Fish Markets	\$249,452		\$332,862	
Fruit & Vegetable Markets	\$96,816		\$129,187	

Retail Group	Study Area Sales Leakages	Current Supportable Sq. ft.	Future Leakage	Future Supportable Sq. ft.
Misc. Specialty Food	\$152,675		\$203,701	
Liquor Stores	(\$1,890,330)		(\$1,635,392)	
Eating Places	\$5,966,197	23,865	\$8,581,681	34,327
Full-Service Restaurants			\$1,247,446	
Other Eating Places			\$1,268,268	
Drinking Places			\$99,770	
Building Materials And Home Furnishings Group	\$6,539,727		\$9,390,052	
Furniture & Home Furnishings	\$3,300,767	13,715	\$4,365,500	18,139
Furniture Stores	\$2,208,353		\$2,917,395	
Other Home Furnishings Stores	\$1,099,728		\$1,455,420	
Household Appliances & Electronics	\$1,614,938	3,927	\$2,141,801	5,208
Used Merchandise	\$177,288	1,321	\$251,436	1,874
Nurseries & Garden Supply Stores	\$891,760	5,261	\$1,187,254	7,005
Lumber & Other Building Materials	\$1,111,436	3,998	\$1,638,700	5,894
Home Centers and Hardware Stores	(\$614,804)		(\$271,927)	
Paint & Wallpaper	\$58,343	344	\$77,288	456
Automotive Group	\$23,070,462		\$33,985,526	
New Cars & RVs	\$21,732,587		\$28,877,168	
Used Car Dealers	\$1,524,206		\$2,042,595	
Gasoline Service Stations	\$3,130,379	2,408	\$5,984,697	4,604
Mobile Homes & Trailers	(\$2,856,680)			
Auto Parts & Accessories	(\$957,599)			
Other Vehicles	\$497,569	1,254	\$690,742	1,741

TABLE B-3

Retail Group	Total Household Spending	Taxable Sales	Total Retail Sales	Sales Leakage	Net Capture of Regional Sales
Total	\$844,609,374	\$1,712,925,000	\$1,955,310,881	\$41,453,808	\$1,152,155,315
Apparel Store Group	\$46,641,673	\$99,502,200	\$99,502,200	\$1,001,639	\$53,862,166
Women's Apparel	\$10,411,758	\$19,849,100	\$19,849,100	\$0	\$9,437,342
Men's Apparel	\$3,718,539	\$2,716,900	\$2,716,900	\$1,001,639	\$0
Family Clothing	\$23,211,717	\$62,165,500	\$62,165,500	\$0	\$38,953,783
Shoe Stores	\$9,299,659	\$14,770,700	\$14,770,700	\$0	\$5,471,041
General Merchandise Group	\$158,024,926	\$242,420,200	\$296,597,248	\$28,047,691	\$166,620,013
Department Stores/Other General Merchandise	\$84,922,852	\$205,252,000	\$218,585,729	\$0	\$133,662,878
Discount Stores	\$50,605,230	\$0	\$0	\$50,605,230	\$0
Department Stores	\$34,317,169	\$205,252,000	\$218,585,729	\$0	\$184,268,560
Other General Merchandise	\$42,192,632	\$13,282,100	\$14,144,941	\$28,047,691	\$0
Warehouse Clubs and Superstores	\$31,758,057			\$31,758,057	\$0
Misc. General Merchandise	\$10,434,575			\$10,434,575	\$0
Drug & Proprietary Stores	\$30,909,442	\$23,886,100	\$63,866,578	\$0	\$32,957,136
Specialty Retail Group	\$52,790,908	\$199,198,600	\$200,508,651	\$0	\$147,717,742
Gifts & Novelties	\$3,935,989	\$14,982,500	\$15,179,838	\$0	\$11,243,849
Sporting Goods	\$6,385,968	\$19,534,200	\$19,553,754	\$0	\$13,167,786
Florists	\$1,544,472	\$2,065,600	\$2,075,980	\$0	\$531,508
Photographic Equipment	\$838,307	\$1,957,700	\$1,957,700	\$0	\$1,119,393
Records & Music	\$2,852,620	\$5,981,400	\$5,981,400	\$0	\$3,128,780
Books & Stationery	\$4,851,156	\$19,539,100	\$19,539,100	\$0	\$14,687,944
Office Supplies/Computer Equipment	\$7,113,396	\$32,257,100	\$32,257,100	\$0	\$25,143,704
Office Supplies	\$3,447,577				
Computer Equipment	\$3,665,820				

Retail Group	Total Household Spending	Taxable Sales	Total Retail Sales	Sales Leakage	Net Capture of Regional Sales
Jewelry	\$4,304,552	\$14,965,600	\$14,980,581	\$0	\$10,676,029
Misc. Specialty Retail	\$20,964,448	\$87,915,400	\$88,983,198	\$0	\$68,018,751
Cosmetics/Beauty Supply	\$1,378,632				
Optical Goods	\$3,212,498				
Other Health/Personal Care Stores	\$2,568,203				
Toys & Hobbies	\$5,464,656				
Pet Stores	\$3,429,744				
Other Misc. Specialty Stores	\$4,910,715				
Food, Eating and Drinking Group	\$215,623,249	\$272,369,000	\$447,816,806	\$0	\$232,193,557
Grocery Stores	\$135,744,772	\$58,659,400	\$206,135,170	\$0	\$70,390,398
Supermarkets	\$129,999,394	\$50,866,400	\$192,675,758	\$0	\$62,676,364
Convenience Stores	\$5,745,263	\$7,793,000	\$13,459,413	\$0	\$7,714,150
Specialty Food Stores	\$4,148,976	\$8,910,500	\$15,389,465	\$0	\$11,240,488
Meat & Fish Markets	\$2,072,897				\$0
Fruit & Vegetable Markets	\$805,096				\$0
Misc. Specialty Food	\$1,270,980				\$0
Liquor Stores	\$6,698,989	\$13,455,800	\$13,688,505	\$0	\$6,989,516
Eating Places	\$69,030,512	\$191,343,300	\$212,603,667	\$0	\$143,573,155
Full-Service Restaurants	\$33,008,594				
Other Eating Places	\$33,185,950				
Drinking Places	\$2,835,968				
Building Materials And Home Furnishings Group	\$83,046,335	\$268,909,300	\$269,063,114	\$12,404,479	\$198,421,259
Furniture & Home Furnishings	\$31,572,014	\$19,129,200	\$19,167,535	\$12,404,479	\$0
Furniture Stores	\$21,253,589			\$21,253,589	\$0
Other Home Furnishings Stores	\$10,318,425			\$10,318,425	\$0
Household Appliances & Electronics	\$14,665,961	\$17,291,500	\$17,291,500	\$0	\$2,625,539
Used Merchandise	\$2,071,389	\$8,566,300	\$8,566,300	\$0	\$6,494,911

Retail Group	Total Household Spending	Taxable Sales	Total Retail Sales	Sales Leakage	Net Capture of Regional Sales
Nurseries & Garden Supply Stores	\$7,850,401	\$17,091,800	\$17,126,052	\$0	\$9,275,651
Lumber & Other Building Materials	\$16,323,102	\$120,426,800	\$120,426,800	\$0	\$104,103,698
Home Centers and Hardware Stores	\$10,025,778	\$81,146,000	\$81,227,227	\$0	\$71,201,450
Paint & Wallpaper	\$537,690	\$5,257,700	\$5,257,700	\$0	\$4,720,010
Automotive Group	\$288,482,283	\$630,525,700	\$641,822,861	\$0	\$353,340,578
New Cars & RVs	\$191,580,577	\$348,651,800	\$348,651,800	\$0	\$157,071,223
Used Car Dealers	\$13,851,615	\$27,662,600	\$27,662,600	\$0	\$13,810,985
Gasoline Service Stations	\$72,234,948	\$137,349,700	\$148,646,861	\$0	\$76,411,914
Mobile Homes & Trailers	\$53,054	\$51,620,800	\$51,620,800	\$0	\$51,567,746
Auto Parts & Accessories	\$5,172,090	\$35,542,800	\$35,542,800	\$0	\$30,370,710
Other Vehicles	\$5,590,000	\$29,698,000	\$29,698,000	\$0	\$24,108,000

TABLE B-4

Ventura County Growth Industries				
NAICS Code	Industry Description	Employment 2004	Location Quotient 2004	Change in County Employment, 2001 to 2004
-----	Total, all industries	261,952	1.00	10,914
111	Crop production	13,653	3.67	2,634
23	Construction	17,103	0.97	1,100
311612	Meat processed from carcasses	185	1.38	101
3119	Other food manufacturing	238	0.53	172
32229	Other converted paper product manufacturing	544	11.52	538
323113	Commercial screen printing	323	1.61	134
325	Chemical manufacturing	8,439	5.04	735
3251	Basic chemical manufacturing	501	4.30	479
325120	Industrial gas manufacturing	501	19.78	496
32531	Fertilizer manufacturing	429	8.08	417
325312	Phosphatic fertilizer manufacturing	215	32.88	215
325314	Fertilizer, mixing only, manufacturing	215	12.34	203
325414	Other biological product manufacturing	5,622	80.15	2,905
325992	Photographic film and chemical manufacturing	481	16.40	481
326160	Plastics bottle manufacturing	495	5.05	312
32721	Glass and glass product manufacturing	230	1.10	116
331513	Steel foundries, except investment	251	8.59	230
332	Fabricated metal product manufacturing	3,782	1.30	340
3323	Architectural and structural metals mfg.	839	1.14	292
33231	Plate work and fabricated structural products	195	0.84	121
33232	Ornamental and architectural metal products	644	1.27	171
332321	Metal window and door manufacturing	452	2.66	165
33272	Turned product and screw, nut, and bolt mfg.	447	2.14	103
332722	Bolt, nut, screw, rivet, and washer mfg.	367	2.62	137
3329	Other fabricated metal product manufacturing	629	1.63	181
33299	All other fabricated metal product mfg.	620	2.84	204
332996	Fabricated pipe and pipe fitting mfg.	450	12.90	450
333220	Plastics and rubber industry machinery	106	5.95	96
33331	Commercial and service industry machinery	563	1.68	131
333315	Photographic and photocopying equipment mfg.	324	12.61	138
333414	Heating equipment, except warm air furnaces	448	14.71	102
333512	Metal cutting machine tool manufacturing	1,015	15.79	222
33399	All other general purpose machinery mfg.	665	2.47	100
333999	Miscellaneous general purpose machinery mfg.	603	7.01	140
334414	Electronic capacitor manufacturing	204	6.84	204
334514	Totalizing fluid meters and counting devices	379	15.92	365
334613	Magnetic and optical recording media mfg.	704	7.30	294
335	Electrical equipment and appliance mfg.	1,743	2.55	434
3351	Electric lighting equipment manufacturing	801	4.28	436

Ventura County Growth Industries

NAICS Code	Industry Description	Employment 2004	Location Quotient 2004	Change in County Employment, 2001 to 2004
33512	Lighting fixture manufacturing	801	4.58	439
335122	Nonresidential electric lighting fixture mfg.	104	1.38	104
335129	Other lighting equipment manufacturing	317	6.18	317
336	Transportation equipment manufacturing	1,838	0.69	237
33639	Other motor vehicle parts manufacturing	296	1.69	96
336399	All other motor vehicle parts manufacturing	296	1.71	99
33641	Aerospace product and parts manufacturing	1,050	0.69	246
336411	Aircraft manufacturing	343	0.61	334
3379	Other furniture related product manufacturing	119	0.77	117
33999	All other miscellaneous manufacturing	504	1.70	177
42	Wholesale trade	11,945	0.88	1,162
484230	Other specialized trucking, long-distance	210	1.97	130
493110	General warehousing and storage	558	0.51	111
493190	Other warehousing and storage	178	2.48	147
52	Finance and insurance	17,577	1.37	2,118
522	Credit intermediation and related activities	9,162	1.45	2,076
5221	Depository credit intermediation	2,045	0.58	369
5222	Nondepository credit intermediation	6,244	3.51	1,083
52229	Other nondepository credit intermediation	6,111	4.03	1,102
5223	Activities related to credit intermediation	873	0.89	624
522320	Financial transaction processing and clearing	541	4.34	499
523930	Investment advice	193	0.51	113
524114	Direct health and medical insurance carriers	2,953	3.29	273
541219	Other accounting services	618	0.99	188
5416	Management and technical consulting services	1,540	0.62	368
54161	Management consulting services	902	0.49	100
541690	Other technical consulting services	393	0.93	196
5419	Other professional and technical services	1,685	1.52	515
541910	Marketing research and public opinion polling	433	2.01	219
551112	Offices of other holding companies	221	2.22	174
551114	Managing offices	5,466	1.16	2,126
561110	Office administrative services	997	0.94	264
5614	Business support services	1,188	0.96	242
561710	Exterminating and pest control services	426	1.31	121
611310	Colleges and universities	1,213	0.65	457
611710	Educational support services	135	0.61	119
623311	Continuing care retirement communities	228	0.77	97
71	Arts, entertainment, and recreation	4,779	0.97	695
711	Performing arts and spectator sports	553	0.44	122
7139	Other amusement and recreation industries	4,101	1.67	537
713990	All other amusement and recreation industries	374	1.32	172
81	Other services, except public administration	10,060	0.73	1,289

Ventura County Growth Industries

NAICS Code	Industry Description	Employment 2004	Location Quotient 2004	Change in County Employment, 2001 to 2004
811212	Computer and office machine repair	769	5.52	359
813319	Other social advocacy organizations	199	1.17	122

TABLE B-5

Los Angeles County Growth Industries

NAICS	Description	County Employment 2004	Location Quotient 2004	Change in County Employment, 2001 to 2004
21311	Support activities for mining	1,092	0.55	267
213112	Support activities for oil and gas operations	745	0.52	212
23	Construction	140,359	0.60	3,346
31142	Fruit and vegetable canning and drying	2,678	0.43	470
311421	Fruit and vegetable canning	2,261	0.51	739
31151	Dairy product, except frozen, manufacturing	4,896	1.24	290
311513	Cheese manufacturing	970	0.70	241
3119	Other food manufacturing	4,423	0.74	292
31194	Seasoning and dressing manufacturing	1,117	1.14	301
311942	Spice and extract manufacturing	712	1.23	252
3133	Textile and fabric finishing mills	7,068	2.87	290
31331	Textile and fabric finishing mills	6,850	2.90	372
313312	Other textile and fabric finishing mills	2,506	2.60	659
315224	Men's pants, except work pants, manufacturing	787	3.30	240
316999	All other leather good manufacturing	679	2.69	221
32111	Sawmills and wood preservation	481	0.23	371
321113	Sawmills	412	0.21	407
32519	Other basic organic chemical manufacturing	368	1.30	215
325620	Toilet preparation manufacturing	4,666	2.51	306
32599	All other chemical preparation manufacturing	2,024	1.31	211
325998	Other miscellaneous chemical product mfg.	804	1.16	338
32799	All other nonmetallic mineral products mfg.	1,123	0.63	222
327991	Cut stone and stone product manufacturing	569	0.78	286
331111	Iron and steel mills	519	0.59	216
333311	Automatic vending machine manufacturing	943	5.36	825
333996	Fluid power pump and motor manufacturing	514	0.75	338
334510	Electro medical apparatus manufacturing	4,468	1.37	1,564
33592	Communication and energy wire and cable mfg.	571	1.09	214
336414	Guided missile and space vehicle mfg.	1,653	0.37	321
337110	Wood kitchen cabinet and countertop mfg.	4,842	1.05	729
339932	Game, toy, and children's vehicle mfg.	2,036	3.23	1,001
4842	Specialized freight trucking	10,087	0.81	555
484220	Other specialized trucking, local	5,945	0.77	1,486
488320	Marine cargo handling	2,101	3.12	454
488991	Packing and crating	1,301	1.63	825
51	Information	216,097	1.62	17,062
512	Motion picture and sound recording industries	138,029	3.11	38,696
5121	Motion picture and video industries	134,413	3.13	40,118
512110	Motion picture and video production	118,563	3.49	42,080
52	Finance and insurance	159,559	0.94	3,010
522	Credit intermediation and related activities	76,470	0.92	5,886
5221	Depository credit intermediation	49,318	1.05	1,097

Los Angeles County Growth Industries

NAICS	Description	County Employment 2004	Location Quotient 2004	Change in County Employment, 2001 to 2004
5222	Nondepository credit intermediation	16,465	0.70	1,959
52229	Other nondepository credit intermediation	13,480	0.67	1,873
522320	Financial transaction processing and clearing	1,863	1.13	450
522390	Other credit intermediation activities	4,669	1.14	1,379
5239	Other financial investment activities	12,926	1.12	370
523930	Investment advice	5,477	1.09	790
52399	All other financial investment activities	1,023	1.03	283
523991	Trust, fiduciary, and custody activities	745	0.92	236
524114	Direct health and medical insurance carriers	12,657	1.06	1,530
541219	Other accounting services	12,586	1.51	5,465
541310	Architectural services	7,178	0.97	244
541490	Other specialized design services	917	1.21	280
541512	Computer systems design services	8,489	0.56	308
5416	Management and technical consulting services	31,570	0.96	5,358
54161	Management consulting services	25,263	1.03	4,499
541613	Marketing consulting services	3,505	0.87	1,325
541614	Process and logistics consulting services	4,880	1.61	3,338
541690	Other technical consulting services	5,092	0.91	1,362
5417	Scientific research and development services	18,017	0.70	4,370
541710	Physical, engineering and biological research	17,024	0.71	4,696
541890	Other services related to advertising	2,380	0.83	247
541990	All other professional and technical services	1,471	1.17	450
561110	Office administrative services	16,135	1.15	3,228
56143	Business service centers	5,481	1.02	762
561439	Other business service centers	4,642	1.07	566
561440	Collection agencies	3,747	1.18	410
56149	Other business support services	2,269	1.17	976
561499	All other business support services	1,127	1.05	719
5616	Investigation and security services	43,688	1.43	4,446
56161	Security and armored car services	39,775	1.49	4,478
561612	Security guards and patrol services	35,159	1.53	4,603
562112	Hazardous waste collection	968	2.14	444
5629	Remediation and other waste services	2,846	0.86	728
562910	Remediation services	1,507	0.86	583
611310	Colleges and universities	41,138	1.66	2,756
61151	Technical and trade schools	3,981	1.02	904
611519	Other technical and trade schools	2,554	1.14	746
611610	Fine arts schools	2,584	1.22	369
61169	All other schools and instruction	4,391	0.96	556
611691	Exam preparation and tutoring	2,909	1.01	370
611710	Educational support services	2,590	0.89	899
62151	Medical and diagnostic laboratories	8,930	1.42	2,020
621511	Medical laboratories	7,459	1.53	1,476

Los Angeles County Growth Industries

NAICS	Description	County Employment 2004	Location Quotient 2004	Change in County Employment, 2001 to 2004
621512	Diagnostic imaging centers	1,470	1.04	543
6241	Individual and family services	20,848	0.99	2,734
71	Arts, entertainment, and recreation	68,322	1.05	5,473
711	Performing arts and spectator sports	28,821	1.73	1,955
7111	Performing arts companies	6,104	1.34	814
711130	Musical groups and artists	4,455	1.94	1,048
711510	Independent artists, writers, and performers	10,864	2.47	413
713	Amusements, gambling, and recreation	35,440	0.79	3,229
7131	Amusement parks and arcades	4,830	0.54	1,574
713110	Amusement and theme parks	4,212	0.49	1,240
7139	Other amusement and recreation industries	23,514	0.72	1,308
7223	Special food services	16,046	1.22	3,503
722310	Food service contractors	11,243	1.32	3,509
811219	Other electronic equipment repair	1,005	1.14	385
811310	Commercial machinery repair and maintenance	4,558	1.07	221
81233	Linen and uniform supply	6,126	1.28	599
812332	Industrial launderers	2,846	1.41	400

TABLE B-6

Santa Barbara County Growth Industries				
NAICS	Description	Study Area Employment 2004	Location Quotient 2004	Change in Study Area Employment, 2001 to 2004
-----	Total, all industries	148,933	1.00	3,174
11	Agriculture, forestry, fishing and hunting	16,032	3.66	2,242
115	Agriculture and forestry support activities	6,663	3.55	2,676
213111	Drilling oil and gas wells	193	8.39	97
23	Construction	9,794	0.98	1,484
31142	Fruit and vegetable canning and drying	31	0.12	31
311423	Dried and dehydrated food manufacturing	31	0.51	31
312	Beverage and tobacco product manufacturing	885	2.06	149
3121	Beverage manufacturing	885	2.06	149
314	Textile product mills	55	0.29	38
31523	Women's cut and sew apparel manufacturing	104	0.43	51
315234	Women's suit, coat, jacket, and skirt mfg.	89	29.11	43
321214	Truss manufacturing	62	1.21	29
321918	Other millwork, including flooring	54	0.78	28
32412	Asphalt paving and roofing materials mfg.	43	2.02	43
324121	Asphalt paving mixture and block mfg.	43	6.23	43
325	Chemical manufacturing	723	0.76	388
3252	Resin, rubber, and artificial fibers mfg.	162	2.76	162
32521	Resin and synthetic rubber manufacturing	162	2.91	162
325212	Synthetic rubber manufacturing	162	7.77	162
3256	Soap, cleaning compound, and toiletry mfg.	305	2.02	280
32561	Soap and cleaning compound manufacturing	275	3.85	250
325611	Soap and other detergent manufacturing	275	8.94	250
325620	Toilet preparation manufacturing	30	0.38	29
332322	Sheet metal work manufacturing	92	0.63	77
33261	Spring and wire product manufacturing	136	2.98	78
332618	Other fabricated wire product manufacturing	136	4.29	78
333	Machinery manufacturing	515	0.54	88
33351	Metalworking machinery manufacturing	129	0.84	37
333515	Cutting tool and machine tool accessory mfg.	119	6.82	73
33361	Turbine and power transmission equipment mfg.	85	1.32	42
333613	Mechanical power transmission equipment mfg.	85	12.88	44
334119	Other computer peripheral equipment mfg.	41	0.33	30
33441	Semiconductor and electronic component mfg.	526	0.42	77
334413	Semiconductors and related device mfg.	293	0.43	56
33451	Electronic instrument manufacturing	2,597	2.06	275
334511	Search, detection, and navigation instruments	1,486	2.69	308
334514	Totalizing fluid meters and counting devices	49	3.62	34
334517	Irradiation apparatus manufacturing	294	21.00	289
334519	Other measuring and controlling device mfg.	294	6.92	190
336413	Other aircraft parts and equipment	96	0.37	61

Santa Barbara County Growth Industries

NAICS	Description	Study Area Employment 2004	Location Quotient 2004	Change in Study Area Employment, 2001 to 2004
337	Furniture and related product manufacturing	376	0.52	129
3371	Household and institutional furniture mfg.	354	0.73	121
33711	Wood kitchen cabinet and countertop mfg.	246	1.25	107
337110	Wood kitchen cabinet and countertop mfg.	246	1.25	107
339112	Surgical and medical instrument manufacturing	750	3.34	341
4841	General freight trucking	246	0.32	33
48412	General freight trucking, long-distance	167	0.39	37
484122	General freight trucking, long-distance LTL	71	0.32	45
511210	Software publishers	859	1.72	87
515112	Radio stations	258	2.95	138
517211	Paging	282	2.86	254
523930	Investment advice	224	1.04	58
524	Insurance carriers and related activities	1,756	0.67	375
5241	Insurance carriers	752	0.50	336
52412	Direct insurers, except life and health	725	0.94	368
524127	Direct title insurance carriers	665	3.00	365
525	Funds, trusts, and other financial vehicles	73	0.64	29
533110	Lessors of nonfinancial intangible assets	59	1.62	50
541	Professional and technical services	9,847	0.92	1,399
5413	Architectural and engineering services	2,538	1.36	782
541330	Engineering services	1,740	1.52	810
54151	Computer systems design and related services	1,279	0.65	451
541511	Custom computer programming services	582	0.50	64
541512	Computer systems design services	679	1.05	390
5416	Management and technical consulting services	1,432	1.01	411
54161	Management consulting services	1,158	1.10	369
541612	Human resource consulting services	269	1.66	236
541613	Marketing consulting services	560	3.24	286
541620	Environmental consulting services	98	0.81	44
541720	Social science and humanities research	81	1.05	44
5418	Advertising and related services	459	0.66	76
541810	Advertising agencies	255	0.99	98
541840	Media representatives	59	0.99	36
55111	Management of companies and enterprises	1,850	0.67	97
551111	Offices of bank holding companies	175	9.26	175
551112	Offices of other holding companies	406	7.16	371
56	Administrative and waste services	9,856	0.89	473
561	Administrative and support services	9,434	0.89	420
561110	Office administrative services	950	1.58	344
561320	Temporary help services	2,999	0.81	557
5614	Business support services	1,070	1.51	157
56142	Telephone call centers	831	5.32	301
561421	Telephone answering services	77	1.84	37

Santa Barbara County Growth Industries

NAICS	Description	Study Area Employment 2004	Location Quotient 2004	Change in Study Area Employment, 2001 to 2004
561422	Telemarketing bureaus	754	6.59	264
5616	Investigation and security services	697	0.53	67
561612	Security guards and patrol services	438	0.44	61
561710	Exterminating and pest control services	297	1.61	67
61151	Technical and trade schools	387	2.31	271
611519	Other technical and trade schools	371	3.87	276
611710	Educational support services	117	0.94	38
62	Health care and social assistance	16,695	1.10	1,339
621	Ambulatory health care services	6,612	1.10	720
62151	Medical and diagnostic laboratories	135	0.50	30
621511	Medical laboratories	121	0.58	63
621610	Home health care services	642	1.24	132
623	Nursing and residential care facilities	3,071	1.16	559
71	Arts, entertainment, and recreation	2,674	0.96	140
711130	Musical groups and artists	125	1.27	44
713	Amusements, gambling, and recreation	1,784	0.93	63
72	Accommodation and food services	19,171	1.36	576
7223	Special food services	493	0.87	118

TABLE B-7

South Santa Barbara Region (Carpinteria-Santa Barbara-Goleta) Base Industries and Professional\Business Services Industries Experience Growth 1998-2003					
NAICS	NAICS Description	1998 Estab.	2003 Estab.	Change	Annual Chg
621111	Offices of physicians (except mental health	213	240	27	2.4%
541310	Architectural services	48	71	23	8.1%
541690	Other scientific & technical consulting services	9	29	20	26.4%
541990	All other professional, scientific, & technology	10	29	19	23.7%
541511	Custom computer programming services	34	49	15	7.6%
541613	Marketing consulting services	11	25	14	17.8%
541211	Offices of certified public accountants	55	67	12	4.0%
541611	Admin management & general management consul	33	43	10	5.4%
512110	Motion picture & video production	11	20	9	12.7%
541710	Research & development in the phys, engineer	44	51	7	3.0%
551114	Corporate, subsidiary, & regional managing o	30	37	7	4.3%
621210	Offices of dentists	133	140	7	1.0%
541618	Other management consulting services	8	14	6	11.8%
621330	Offices of mental health practitioners	10	16	6	9.9%
621399	Offices of all other miscellaneous health pr	9	15	6	10.8%
484220	Specialized freight (except used goods)	6	11	5	12.9%
511120	Periodical publishers	11	16	5	7.8%
323114	Quick printing	4	8	4	14.9%
334510	Electro medical & electrotherapeutic apparatus	1	5	4	38.0%
541910	Marketing research & public opinion polling	2	6	4	24.6%
561110	Office administrative services	17	21	4	4.3%
211111	Crude petroleum and natural gas extraction	5	8	3	9.9%
325620	Toilet preparation mfg	1	4	3	32.0%
484110	General freight trucking, local	3	6	3	14.9%
541199	All other legal services	2	5	3	20.1%
541370	Surveying & mapping (except geophysical) ser	6	9	3	8.4%
541830	Media buying services	2	5	3	20.1%
551112	Offices of other holding companies	9	12	3	5.9%
115210	Support activities for animal production	4	6	2	8.4%
314121	Curtain & drapery mills	1	3	2	24.6%
332812	Metal coating/engraving (jewelry/silver)	1	3	2	24.6%
332999	All other miscellaneous fabricated metal pro	1	3	2	24.6%
333298	All other industrial machinery mfg	1	3	2	24.6%
334412	Bare printed circuit board mfg	1	3	2	24.6%
334418	Printed circuit assembly (electronic assembly)	1	3	2	24.6%
334519	Other measuring & controlling device mfg	3	5	2	10.8%
541219	Other accounting services	31	33	2	1.3%
541330	Engineering services	82	84	2	0.5%
561422	Telemarketing bureaus	5	7	2	7.0%
114111	Finfish Fishing	4	5	1	4.6%
312130	Wineries	1	2	1	14.9%
327112	Vitreous china, fine earthenware, & other	3	4	1	5.9%

South Santa Barbara Region (Carpinteria-Santa Barbara-Goleta) Base Industries and Professional\Business Services Industries Experience Growth 1998-2003

NAICS	NAICS Description	1998 Estab.	2003 Estab.	Change	Annual Chg
332322	Sheet metal work mfg	2	3	1	8.4%
332813	Electroplating, plating, polishing, anodizin	3	4	1	5.9%
333514	Special die & tool, die set, jig, & fixture	1	2	1	14.9%
333515	Cutting tool & machine tool accessory mfg	1	2	1	14.9%
334112	Computer storage device mfg	1	2	1	14.9%
334310	Audio & video equipment mfg	1	2	1	14.9%
334413	Semiconductor & related device mfg	3	4	1	5.9%
334515	Electricity measuring & testing instrument m	1	2	1	14.9%
334517	Irradiation apparatus mfg	1	2	1	14.9%
335312	Motor & generator mfg	1	2	1	14.9%
336612	Boat building	1	2	1	14.9%
339911	Jewelry (except costume) mfg	1	2	1	14.9%
484121	General freight trucking, long-distance, tru	2	3	1	8.4%
512230	Music publishers	1	2	1	14.9%
522298	All other nondepository credit intermediatio	2	3	1	8.4%
541214	Payroll services	3	4	1	5.9%
541320	Landscape architectural services	16	17	1	1.2%
541380	Testing laboratories	3	4	1	5.9%
541810	Advertising agencies	11	12	1	1.8%
541820	Public relations agencies	5	6	1	3.7%

TABLE B-8

Agoura Hills-Calabasas-West Lake Village (Base Industries and Professional\Business Services Industries Experience Growth 1998-2003)

NAICS	NAICS Description	1998 Estab.	2003 Estab.	Change	Annual Chg
512110	Motion picture & video production	12	64	52	39.8%
541511	Custom computer programming services	11	58	47	39.4%
541611	Admin management & general management consul	12	56	44	36.1%
541512	Computer systems design services	15	37	22	19.8%
541690	Other scientific & technical consulting serv	6	28	22	36.1%
518210	Data processing, hosting, & related services	0	21	21	20.0%
541990	All other professional, scientific, & techni	3	24	21	51.6%
541613	Marketing consulting services	5	22	17	34.5%
541110	Offices of lawyers	155	169	14	1.7%
561110	Office administrative services	13	27	14	15.7%
541330	Engineering services	38	51	13	6.1%
541430	Graphic design services	6	19	13	25.9%
541810	Advertising agencies	14	26	12	13.2%
511210	Software publishers	8	19	11	18.9%
518111	Internet service providers	0	10	10	20.0%
541310	Architectural services	9	19	10	16.1%
541612	Human resources & executive search consultin	11	21	10	13.8%
115210	Support activities for animal production	0	9	9	20.0%
621340	Offices of physical, occupational, & speech	16	25	9	9.3%
522320	Financial transactions processing, reserve,	0	8	8	20.0%
541820	Public relations agencies	4	12	8	24.6%
512191	Teleproduction & other postproduction service	3	9	6	24.6%
541219	Other accounting services	27	33	6	4.1%
541618	Other management consulting services	4	10	6	20.1%
541840	Media representatives	0	6	6	20.0%
541910	Marketing research & public opinion polling	1	7	6	47.6%
551114	Corporate, subsidiary, & regional managing o	13	19	6	7.9%
541320	Landscape architectural services	1	6	5	43.1%
541890	Other services related to advertising	5	10	5	14.9%
315212	Women's, girls', & infants' cut & sew apparel	0	4	4	20.0%
512120	Motion picture & video distribution	1	5	4	38.0%
541710	Research & development in the phys, engineer	8	12	4	8.4%
541860	Direct mail advertising	0	4	4	20.0%
334220	Radio & TV broadcasting & wireless communication	1	4	3	32.0%
334515	Electricity measuring & testing instrument m	1	4	3	32.0%
339999	All other miscellaneous mfg	0	3	3	20.0%
511120	Periodical publishers	3	6	3	14.9%
516110	Internet publishing & broadcasting	0	3	3	20.0%
541720	Research & development in the social science	1	4	3	32.0%
551112	Offices of other holding companies	4	7	3	11.8%
621512	Diagnostic imaging centers	5	8	3	9.9%
315239	Women's & girls' cut & sew other outerwear m	0	2	2	20.0%

Agoura Hills-Calabasas-West Lake Village (Base Industries and Professional\Business Services Industries Experience Growth 1998-2003)

NAICS	NAICS Description	1998 Estab.	2003 Estab.	Change	Annual Chg
325620	Toilet preparation mfg	1	3	2	24.6%
333315	Photographic & photocopying equipment mfg	0	2	2	20.0%
333319	Other commercial & service industry machinery	0	2	2	20.0%
334119	Other computer peripheral equipment mfg	0	2	2	20.0%
334310	Audio & video equipment mfg	1	3	2	24.6%
334413	Semiconductor & related device mfg	1	3	2	24.6%
339932	Game, toy, & children's vehicle mfg	0	2	2	20.0%
484110	General freight trucking, local	0	2	2	20.0%
488991	Packing & crating	0	2	2	20.0%
512199	Other motion picture & video industries	0	2	2	20.0%
512210	Record production	0	2	2	20.0%
512240	Sound recording studios	0	2	2	20.0%
525930	Real Estate Investment Trusts - REITs	0	2	2	20.0%
541370	Surveying & mapping (except geophysical) ser	4	6	2	8.4%
541620	Environmental consulting services	5	7	2	7.0%
561520	Tour operators	2	4	2	14.9%
115116	Farm Management Services	0	1	1	
311812	Commercial bakeries	0	1	1	
311813	Frozen cakes, pies, & other pastries mfg	0	1	1	
311991	Perishable prepared food mfg	0	1	1	
312229	Other tobacco product mfg	0	1	1	
314912	Canvas & related product mills	0	1	1	
314999	All other miscellaneous textile product mill	0	1	1	
323122	Prepress services	0	1	1	
325188	All other basic inorganic chemical mfg	0	1	1	
325992	Photographic film, paper, plate, & chemical	1	2	1	14.9%
326199	All other plastics product mfg	0	1	1	
327991	Cut stone & stone product mfg	0	1	1	
332323	Ornamental & architectural metal work mfg	0	1	1	
333515	Cutting tool & machine tool accessory mfg	0	1	1	
333618	Other engine equipment mfg	0	1	1	
333997	Scale & balance (except laboratory) mfg	0	1	1	
334111	Electronic computer mfg	0	1	1	
334210	Telephone apparatus mfg	2	3	1	8.4%
334510	Electromedical & electrotherapeutic apparatus	0	1	1	
334516	Analytical laboratory instrument mfg	0	1	1	
335311	Power, distribution, & specialty transformer	0	1	1	
335314	Relay & industrial control mfg	0	1	1	
336321	Vehicular lighting equipment mfg	0	1	1	
337214	Office furniture (except wood) mfg	0	1	1	
339914	Costume jewelry & novelty mfg	0	1	1	
484121	General freight trucking, long-distance	1	2	1	14.9%
488490	Other support activities for road transportation	0	1	1	
511199	All other publishers	0	1	1	

Agoura Hills-Calabasas-West Lake Village (Base Industries and Professional\Business Services Industries Experience Growth 1998-2003)

NAICS	NAICS Description	1998 Estab.	2003 Estab.	Change	Annual Chg
512230	Music publishers	0	1	1	
512290	Other sound recording industries	0	1	1	
541199	All other legal services	1	2	1	14.9%
541490	Other specialized design services	0	1	1	
541614	Process, physical distribution, & logistics	3	4	1	5.9%
541870	Advertising material distribution services	0	1	1	
561422	Telemarketing bureaus	2	3	1	8.4%
621310	Offices of chiropractors	17	18	1	1.1%
621330	Offices of mental health practitioners	13	14	1	1.5%

TABLE B-9

Potential Westside Industry Targets				
NAICS Code	Industry Description	Study Area Employment 2004	Location Quotient 2004	Change in Study Area Employment, 2001 to 2004
213111	Drilling oil and gas wells	193	8.39	97
213112	Support activities for oil and gas operations	745	0.52	212
23	Construction	17,103	0.97	1,100
313312	Other textile and fabric finishing mills	2,506	2.60	659
314	Textile product mills	55	0.29	38
315224	Men's pants, except work pants, manufacturing	787	3.30	240
315234	Women's suit, coat, jacket, and skirt mfg.	89	29.11	43
316999	All other leather good manufacturing	679	2.69	221
321214	Truss manufacturing	62	1.21	29
321918	Other millwork, including flooring	54	0.78	28
32229	Other converted paper product manufacturing	544	11.52	538
323113	Commercial screen printing	323	1.61	134
324121	Asphalt paving mixture and block mfg.	43	6.23	43
325120	Industrial gas manufacturing	501	19.78	496
32519	Other basic organic chemical manufacturing	368	1.30	215
3252	Resin, rubber, and artificial fibers mfg.	162	2.76	162
32531	Fertilizer manufacturing	429	8.08	417
325414	Other biological product manufacturing	5,622	80.15	2,905
3256	Soap, cleaning compound, and toiletry mfg.	305	2.02	280
325620	Toilet preparation manufacturing	30	0.38	29
32599	All other chemical preparation manufacturing	2,024	1.31	211
325992	Photographic film and chemical manufacturing	481	16.40	481
325998	Other miscellaneous chemical product mfg.	804	1.16	338
326160	Plastics bottle manufacturing	495	5.05	312
32721	Glass and glass product manufacturing	230	1.10	116
32799	All other nonmetallic mineral products mfg.	1,123	0.63	222
327991	Cut stone and stone product manufacturing	569	0.78	286
332	Fabricated metal product manufacturing	3,782	1.30	340
3329	Other fabricated metal product manufacturing	629	1.63	181
33299	All other fabricated metal product mfg.	620	2.84	204
332996	Fabricated pipe and pipe fitting mfg.	450	12.90	450
333	Machinery manufacturing	515	0.54	88
334119	Other computer peripheral equipment mfg.	41	0.33	30
33441	Semiconductor and electronic component mfg.	526	0.42	77
334413	Semiconductors and related device mfg.	293	0.43	56
334414	Electronic capacitor manufacturing	204	6.84	204
33451	Electronic instrument manufacturing	2,597	2.06	275
334613	Magnetic and optical recording media mfg.	704	7.30	294
335	Electrical equipment and appliance mfg.	1,743	2.55	434
336	Transportation equipment manufacturing	1,838	0.69	237
337	Furniture and related product manufacturing	376	0.52	129

Potential Westside Industry Targets

NAICS Code	Industry Description	Study Area Employment 2004	Location Quotient 2004	Change in Study Area Employment, 2001 to 2004
339112	Surgical and medical instrument manufacturing	750	3.34	341
339932	Game, toy, and children's vehicle mfg.	2,036	3.23	1,001
33999	All other miscellaneous manufacturing	504	1.70	177
42	Wholesale trade	11,945	0.88	1,162
511210	Software publishers	859	1.72	87
512	Motion picture and sound recording industries	138,029	3.11	38,696
522320	Financial transaction processing and clearing	541	4.34	499
5241	Insurance carriers	752	0.50	336
541	Professional and technical services	9,847	0.92	1,399
541219	Other accounting services	618	0.99	188
5413	Architectural and engineering services	2,538	1.36	782
541490	Other specialized design services	917	1.21	280
54151	Computer systems design and related services	1,279	0.65	451
541511	Custom computer programming services	582	0.50	64
541512	Computer systems design services	8,489	0.56	308
5416	Management and technical consulting services	1,432	1.01	411
541612	Human resource consulting services	269	1.66	236
541613	Marketing consulting services	3,505	0.87	1,325
541614	Process and logistics consulting services	4,880	1.61	3,338
541620	Environmental consulting services	98	0.81	44
541690	Other technical consulting services	5,092	0.91	1,362
5417	Scientific research and development services	18,017	0.70	4,370
541710	Physical, engineering and biological research	17,024	0.71	4,696
541720	Social science and humanities research	81	1.05	44
5418	Advertising and related services	459	0.66	76
5419	Other professional and technical services	1,685	1.52	515
5614	Business support services	1,188	0.96	242
56142	Telephone call centers	831	5.32	301
561440	Collection agencies	3,747	1.18	410
56149	Other business support services	2,269	1.17	976
5616	Investigation and security services	697	0.53	67
561710	Exterminating and pest control services	426	1.31	121
5629	Remediation and other waste services	2,846	0.86	728
61151	Technical and trade schools	3,981	1.02	904
611610	Fine arts schools	2,584	1.22	369
611710	Educational support services	135	0.61	119
62151	Medical and diagnostic laboratories	8,930	1.42	2,020
623	Nursing and residential care facilities	3,071	1.16	559
7111	Performing arts companies	6,104	1.34	814
711510	Independent artists, writers, and performers	10,864	2.47	413
72	Accommodation and food services	19,171	1.36	576
7223	Special food services	16,046	1.22	3,503
811212	Computer and office machine repair	769	5.52	359

Potential Westside Industry Targets

NAICS Code	Industry Description	Study Area Employment 2004	Location Quotient 2004	Change in Study Area Employment, 2001 to 2004
811219	Other electronic equipment repair	1,005	1.14	385
811310	Commercial machinery repair and maintenance	4,558	1.07	221
81233	Linen and uniform supply	6,126	1.28	599
812332	Industrial launderers	2,846	1.41	400
813319	Other social advocacy organizations	199	1.17	122

TABLE B-10

Summary of Westside Employment Growth Potential				
	Land Use	Acres	Sq. Ft.	Jobs
Existing Employment [a]				9,105
General Plan Projected Growth [b]				
	Industrial	42	477,000	636
	Office	19	200,000	667
	Retail	5	67,086	122
	Total	66		1,425
Catalyst Sites [c]				
1. Selby	Retail	25	27,225	50
	Office		54,450	182
2. Kellogg	Retail	2	21,780	40
3. VUSD/AERA	Industrial	85	620,186	827
	Mixed-Use	5	54,450	99
4. AERA	Industrial	90	980,100	1,307
5. USA Petrol.	Business Park	15	163,350	297
6. Bonsall	Retail	40	435,600	792
	Business Park	50	217,800	396
TOTAL		312		3,988

[a] Westside Revitalization Plan, January 8, 2002. p.15.

[b] Ventura 2005 General Plan, August 8, 2005. p. 3-4. The General Plan provides predicted sq.ft. growth. Acres and employment are estimated by ADE, Inc.

[c] All figures for the catalyst sites are estimated by ADE.

APPENDIX C: REDEVELOPMENT FEASIBILITY

PRELIMINARY BLIGHT ANALYSIS FOR WESTSIDE

This section reviews the preliminary blight analysis findings. The discussion begins with a description of key indicators of blight, which can be broken down into two broad categories: economic blight and physical blight. Then, the findings with respect to key blight indicators are presented. Based on the analysis of blight indicators investigated to date, it is concluded that economic and physical blight exists in the Westside and North Avenue areas, allowing decision makers to contemplate the next steps with respect to creating a Redevelopment Project Area in this part of the City of Ventura.

ECONOMIC AND PHYSICAL BLIGHT

In considering whether to form a redevelopment project area, local officials must determine if “economic blight” and “physical blight” exist in a clearly delineated area, also known as the redevelopment study area. The following are key elements to determining whether an area is experiencing “economic blight”:

- ? Stagnant property values
- ? High vacancies or low lease rates
- ? Lack of needed commercial facilities
- ? Overcrowding and or adult-oriented uses
- ? Irregular lots in multiple ownership
- ? High crime rate

The following are key elements to determining whether an area is experiencing “physical blight”:

- ? Unsafe or unhealthy building
- ? Inadequate parcel size or conditions

- ? Uses that prevent economic development
- ? Irregular lots in multiple ownership

BLIGHT ANALYSIS FINDINGS: ECONOMIC BLIGHT

The discussion below focuses on housing and crime in the Westside and North Avenue areas. The discussion also touches on economic blight-related findings included in a report called the “Westside Economic Initiative: April 2006: Draft”. In addition, ADE has gathered over 200 photographs of the Westside and North Avenue areas, and these photos support findings of economic blight in the area.

With regard to housing, the Department of Housing and Urban Development (HUD) defines overcrowded housing as a living situation in which there is more than one person per room. Table 1 below shows the existence of considerable overcrowded housing conditions in the Westside area. Twenty-four percent of all persons in the Westside area reside in overcrowded living situations, a rate that is three times that for the city as a whole, and twice as high as that for the county. In San Buenaventura and the County as a whole, eight percent and 12 percent respectively of all people live in overcrowded situations.

Table 1 Overcrowded Housing in Westside Versus City and County

	Ventura County, California	San Buenaventura (Ventura) City, California	Westside
Total number of persons	243,234	38,571	4,015
Total number of persons living in overcrowded situation	30,111	3,011	964
Overcrowded living conditions	12%	8%	24%

Source: US Census, Census 2000, Table H20

Table 2 below identifies crime in the City of Ventura, and it shows that crime is most concentrated in Beat 1, which includes the Westside area. Crime data comes from the City of Ventura Police Department, which issued a detailed strategic plan in 2005. As Table 2 shows, Beat 1 experienced 1.3 calls for service per person, versus the citywide call for

service rate of 0.9 per person. In other words, Beat 1 experiences 58 percent more calls for services per person than the city as a whole. And, the Westside area experience almost 23 percent and eight percent more calls on a call for service per person basis than Beat 2 and Beat 3.

Table 2. Comparison of Police calls for Services: Westside versus Other Beats and City as a Whole, 2004

Area	Beat	Population	Calls for service	Calls for service per resident
Westside + plus	Beat 1	17,353	22,690	1.3
	Beat 2	19,241	20,515	1.1
	Beat 3	21,156	25,603	1.2
	Beat 4	46,750	20,621	0.4
City of Ventura	TOTAL	104,500	89,429	0.9

Source: Ventura Police Department, "Measuring What Matters: Strategic Plan 2005-2007"

In addition to overcrowded housing and crime, another economic blight condition in Westside involves stagnant property values. The report called "Westside Economic Initiative: April 2006: Draft" includes several tables that show that residential, commercial and industrial property values lag considerably behind values for the city as a whole (see page 21). Industrial property in the Westside area lags considerably behind the city as a whole, or \$3.64 versus \$13.38. Commercial property in the area only somewhat lagged values for the city as a whole, or \$18.28 versus \$19.31. Total assessed value of residential, commercial and industrial properties combined amounts to \$7.26 per square foot in the Westside area versus \$13.78 per square foot for the city as a whole – or almost half the value of the city as a whole.

Another factor contributing to blight in the area is the high concentration of adult-oriented commercial uses in the Westside area. Liquor stores, bars and other businesses catering exclusively to adults averaged 4.76 per square mile in the Westside, versus 2.51 per square mile citywide.³

³ "Westside Economic Initiative: April, 2006: Draft," page 5

BLIGHT ANALYSIS FINDINGS: PHYSICAL BLIGHT

Table 3 below identifies the number of unsafe and unhealthy buildings, particularly with respect to building code violations that occurred in the City of Ventura between 1996 and 2006. Table 3 compares violations citywide against violations in the Westside. As the table shows, there are considerably higher rate of violations on a per square mile basis in the Westside and North Avenue, at 240 violations per square mile versus 89 violations per square mile for the city as a whole.

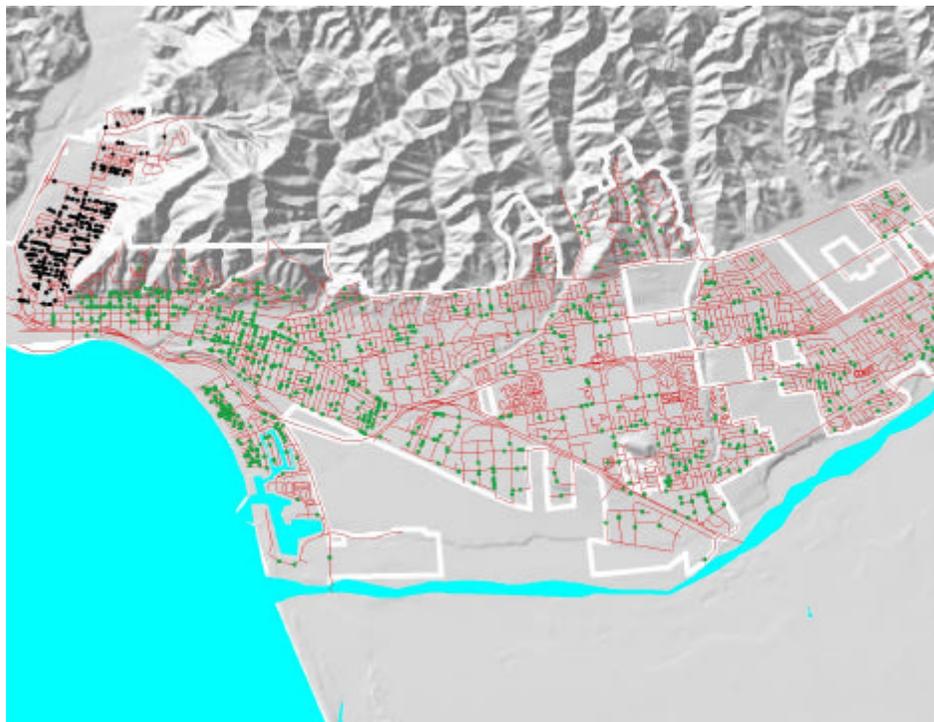
Table 3. Building Code Violations on a Per Square Mile Basis

	Bldg Code Violations, 1996- 2006	Square Miles	Violations per Square Mile
Westside Area	404	1.69	240
City of Ventura	1,871	21.07	89

Source: City of Ventura and Applied Development Economics

Figure 1 plots the building code violations on a map for a visual comparison of concentrations of building code violations.

Figure 1. Map of Building Code Violations, 1996-2006



Other physical blight conditions in the Westside area include the following, particularly with respect to inadequate parcel size, conditions, and other factors that impede economic development:

- ? Structural rehabilitation needs: approximately 27 percent of the properties in the area suffer from moderate to extensive deterioration, while an additional 45 percent showed a high degree of deferred maintenance.
- ? High concentration of hazardous materials sites: Westside and North Avenue properties average 19 hazardous materials sites per square mile, as compared to 3 sites per square mile citywide. This is due to the historical industrial activity in the area.
- ? There is an abundance of absentee owners in the area: Westside housing is approximately 65 percent rents occupied versus 44 percent citywide.
- ? Buildings west of Ventura Avenue are generally in various forms of deterioration, and many are constructed of corrugated metal, although this has not deterred businesses from occupying this area.
- ? A majority of industrial space lacks amenities such as handicap accessibility, enclosed storage space, and modern loading and unloading facilities.
- ? Small parcels are also a problem in the Westside. Modern industrial developments occur on lots of at least 1 acre in size; Westside industrial properties average less than 0.5 acres.
- ? Sewers within Ventura Avenue and Park Row Avenue are deficient under peak dry weather and peak wet weather flow conditions.
- ? An existing 229-foot sewer reach consisting of 8-inch diameter gravity sewer within North Ventura Avenue between Franklin Lane and Barry Drive is deficient under peak dry weather flow conditions and peak wet weather flow conditions.
- ? Another sewer line on South Olive Street is deficient under peak wet weather flow conditions.

- ? Five reaches of the existing South Ventura Avenue sewer are deficient under what is referred to as near-term development conditions. Several of the five deficient sewer reaches need to be replaced.
- ? Other deficient sewer systems in the area include an existing 460-foot reach of 24-inch diameter sewer located on South Olive Street, and this needs to be replaced by a new 27-inch sewer. The sewer on North Ventura Avenue north of Seneca Street also needs to be replaced, as does the sewer line on West Vince Street near Olive Street.

In addition to the discussion directly above, the consultant has gathered over 200 photographs of the Westside area, and these photos support findings of physical blight in the area.

RECOMMENDATION

Based on the forgoing analysis, there is sufficient evidence to demonstrate that economic and physical blight conditions exist in the Westside and North Avenue areas. This is generally true within the City boundaries and is true with respect to many of the commercial and industrial properties in the North Avenue area, particularly the USA Petroleum site. It is not clear that the residential neighborhoods in the unincorporated area would qualify, nor would there necessarily be much benefit to including these subdivisions in the redevelopment project area. Further detailed analysis is needed to refine and finalize these recommendations.

REDEVELOPMENT TAX INCREMENT

PROJECTIONS

ADE has prepared preliminary tax increment projections to test the feasibility of a redevelopment project area on the Westside. With minimal growth of 3% per year, the area could support as much as \$11 million in bonds over a twenty year period. This would be a viable amount of funding to complete infrastructure improvements and other projects in the area; however, the market research presented earlier in this report indicates that actual development levels would be much higher. With 7% growth, the area would generate bonding capacity of about \$26 million and at 12% the figure

increases to about \$54 million. This amount is split nearly evenly between the City area and the North Avenue area currently in County jurisdiction. Based on these calculations, either area could function on its own as a redevelopment project area. This suggests the City would have some flexibility in drawing a project area boundary that best addresses the blighting conditions discussed above