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NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

BACKGROUND

As part of the North San Jose Neighborhoods Planning Taskforce work program, the Taskforce, staff and consultants have reviewed the role of potential retail development as anticipated in the North San Jose Policy over a 30-year planning horizon. The Taskforce developed Guiding Principles as a planning tool for the implementation of that retail growth. These Guiding Principles form the official work and recommendations of the Taskforce regarding retail. The Taskforce sees retail as a key component for the future of North San Jose, and views retail as not only providing needed services, but also having a crucial place making role. The desire of the Taskforce is that retail can be a key ingredient in creating a sense of place with in North San Jose.

The purpose of this report is to:

1. Document information provided to the Taskforce and the Guiding Principles developed and recommended by the Taskforce pertaining to retail development,
2. Estimate current and projected market demand and verify the potential for realizing the 1.7 million square feet of commercial uses supported by the North San Jose Policy,
3. Describe the types of retail that could be supported by the office / industrial and residential growth anticipated in the North San Jose Policy Area, and,
4. Identify sites where retail is most likely to be economically viable.

North San Jose Policy

The following information was available to the Taskforce as the context for the retail discussion.

The North San Jose Area Development Policy (Policy) provides for up to 1.7 million square feet of commercial (neighborhood serving retail) land use to support continued growth and expansion of the Policy Area as a location for high technology employment through 2030 and beyond. The Policy provides for the addition of more than 26 million square feet of commercial office / industrial space and up to 32,000 new residential units. The neighborhood serving retail is intended to support both new office and residential development as an amenity and a means of reducing the need for vehicle trips to small scale retail destinations. This growth will be market driven and therefore is not tied to a

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

specific time period. New residential growth can only occur incrementally based on the progress of office / industrial development: 8,000 dwelling units may be built initially and up to three subsequent phases of 8,000 units each can be added for every seven million square feet of office / industrial space built. Supporting commercial uses that would potentially reduce vehicle trips (e.g. food service, financial services, gymnasiums, child care) are strongly encouraged within the Policy Area and are encouraged as a part most new residential development, as appropriate, and for industrial development within the Core Area.

The anticipated sequence of development is outlined in general terms on the Attachment 1, North San Jose Plan Area - Existing and Projected Development. The expected growth shown in this table is fairly well defined through 2014, based on the proposed developments that have been submitted to the Planning Division of the City as of July 2007. After 2014, there is little basis for projecting the pace of development. Phases 2 – 4 could begin at any interval and continue to and potentially beyond 2030.

1. GUIDING PRINCIPLES: RETAIL DEVELOPMENT IN NORTH SAN JOSE

The following Guiding Principles were developed as the Taskforce members' recommendations for the implementation of new retail development. A Retail Subcommittee of the Taskforce met twice outside the Taskforce meetings as a working group to draft the specific wording of the Guiding Principles which were discussed and tentatively approved by the whole Taskforce. (Note: the master list of Guiding Principles has Retail as section 6, this numbering is retained in this document for consistency).

6. RETAIL

6.1. Design Guidelines Criteria

- 6.1.1.** Adopt specific Design Guidelines for Amenity, Neighborhood and Regional Retail Projects
- 6.1.2.** Encourage the use of design professionals with significant experience in retail development
- 6.1.3.** Adopted Design Guidelines should ensure flexible, multi-tenant space that can be refreshed and re-leased over time.
- 6.1.4.** Design Guidelines should incorporate retail industry standards related to height, configuration, trash enclosures, grease interceptors, loading zones, signage and other key elements necessary for successful retail spaces
- 6.1.5.** Encourage well designed, quality community gathering spots and outdoor spaces in conjunction with retail spaces
- 6.1.6.** Encourage quality landscaping, site design and building materials
- 6.1.7.** Encourage walkability and pedestrian activity
- 6.1.8.** Promote range of retail offerings

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

6.1.9. Create a sense of place with retail design

6.2. Retail Site Criteria

6.2.1. Preserve Site Opportunities for Neighborhood and Regional Retail that promote market viability

6.2.2. Location – highly visible, prominent, gateway orientation, immediately adjacent to parking

6.2.3. Visibility - visible from pedestrian corridors and roadways when possible

6.2.4. Accessibility – ease of pedestrian and traffic movement in and out of the site

6.2.5. Accessible by public transit whenever possible

6.3. Crosscutting Key Elements For All Retail Uses

6.3.1. Encourage walkability and access to public transit

6.3.2. Encourage quality site design and landscaping solutions

6.3.3. Encourage well designed outdoor gathering spaces

6.3.4. Encourage quality architecture and material use

6.4. Key Elements of Amenity Retail

6.4.1. Encourage well integrated mixed use development

6.4.2. Encourage access to adequate parking within close proximity to retail

6.5. Key Elements of Neighborhood Retail

6.5.1. Encourage neighborhood retail according to main street retail concepts

6.5.2. Create parking solutions that provide adequate stalls and close proximity but discourages excessive parking near storefronts to promote a pedestrian friendly experience.

6.6. Key Elements of Regional Retail

6.6.1. Highway/Freeway Visibility and Access

6.6.2. Draws from surrounding communities

6.6.3. Healthy parking capacity

6.6.4. Multi-modal hub (public transit)

6.6.5. Minimal Site Opportunity in North San Jose due to size and location needs

6.7. Promote small business programs to developers and prospective tenants that can assist in small business formulation and support the on-going health of the small business community.

6.7.1. Encourage non-franchise and family owned businesses as well as national credit tenants

6.7.2. Small Business Ambassador Program

6.7.3. Financial Assistance Programs

6.7.4. Entrepreneur Center

6.7.5. Retail Recruitment

6.7.6. Permit Assistance

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

In addition to the guiding principles specifically addressing retail, the Taskforce considered and adopted a number of guiding principles related to creating a central place and place making. In consideration of the importance of retail in place making and creating a potential central place in North San Jose please find below these Guiding Principles in their entirety. It is understood that while place making and the central place will include more than retail alone, retail must be present and is a central component of place making in North San Jose.

7. CENTRAL PLACE AND PLACE MAKING

7.1. Key sites should be explored as a central place for North San Jose.

7.2. The appropriate site should be centrally located and near existing/future residential neighborhoods

7.3. The City should explore creating incentives for the property owner to develop the site appropriately.

7.4. The site should have a mix of community and neighborhood serving retail stores.

7.5. Community uses could include an

- 7.5.1. elementary school,***
- 7.5.2. a park,***
- 7.5.3. a square,***
- 7.5.4. a community center and***
- 7.5.5. a library.***

7.6. Retail stores could include a mixture of shops, stores, cafes and restaurants.

7.7. The Moitozo site should be explored as one of the potential central places, but the Moitozo property should be allowed to remain agricultural as long as the property owners desire.

2. MARKET DEMAND: VERIFICATION OF POTENTIAL RETAIL BUILD-OUT

The following information on market demand was provided to the Taskforce. The retail industry measures demand using population and buying power data for identified "trade areas". For the North San Jose Taskforce process, the data was provided by Claritas and Buxton, two companies which provide analysis based on U.S. Census data.

The North San Jose Policy provides for retail that would act as an amenity, convenience and service for area residents and employees, while decreasing the need for longer vehicle trips. Therefore the retail trade area is defined by a quick, convenient, 5-minute drive time. This is shown in Attachment 4, Five-Minute Trade Area Map. The trade area includes most of the North San Jose Policy Area, as well as some areas beyond it, recognizing that trade areas do not conform strictly to planning area and city boundaries.

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

The estimated current demand generated by the residents and the existing employee base in this trade area is \$511 million annually. The retail market demand at build out of the anticipated industrial and residential development is estimated to be \$2.1 billion annually. This is shown in Attachment 5, Current and Projected Retail Demand before Competitive Analysis.

Market demand studies must be adjusted (usually reduced) in light of the retail competition that exists and will exist within and near the trade area. A competitive analysis was not undertaken at this time because it has limited value until there is a specific proposed development under consideration in North San Jose. However, even allowing for such an adjustment or reduction in net demand, the market data shows that the North San Jose Policy Area could support at least 1.7 million square feet of development at the time of build out, the amount allowed under the Policy and the related Policy EIR (Environmental Impact Report).

Demand for new retail within the North San Jose Policy Area is currently low, as shown by the \$511 M estimate noted above. Although there is evidence of high weekday lunch time demand generated by employees, the low household count doesn't support high evening and weekend retail traffic. Residential growth, not employment growth, is critical to generating that 7-day a week demand, and will have to increase before there is significant new retail development.

The projected retail demand for 2030 used in this report is intentionally conservative, in that,

- Demand is based on the projected employment and residential growth provided for by the North San Jose Policy.
- Although the trade area includes the North San Jose Policy Area and some surrounding land, there is no allowance for growth in demand in areas outside of the Policy Area itself.
- The projections use modest increases in the buying power of the projected employees and residents.

See also Attachment 3, Assumptions and Limiting Conditions for further explanation of the limits of market analysis.

3. TYPES OF RETAIL

The following information on retail typologies was provided and discussed with the Taskforce as background information for their discussion.

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

The North San Jose Policy and Policy EIR provides capacity for 1.7 million square feet of retail development that would serve employees and residents in the Policy Area. This retail could be one of three types of retail:

- Amenity Retail within a large developments refers to retail space that is a small part of a larger corporate or residential complex and also provides access for customers from outside the specific development. This is considered “amenity” retail since it is incidental to the primary purpose of the development and intended to enhance the marketability of that primary use.
- Neighborhood Retail Centers - Retail Centers refers development where retail is the sole use, the primary use, or one of the primary uses for the project. Retail centers in the North San Jose Policy Area are expected to be neighborhood and employee serving. Traditionally such development has taken the form of a neighborhood shopping center. As land costs increase, there is more likelihood that retail centers may incorporate additional uses, such as residential or office in a mixed use format. However, for this type, the large retail portion will have sufficient square footage that it is a primary use in and of itself.
- Regional Retail Centers - The Policy also anticipates the potential for regional serving retail, and states that such use would require additional approvals beyond the North San Jose Policy and Policy EIR. A regional-serving retail center could be sited on a large, well-located property with major freeway or arterial frontage. It would have the capacity to draw customers from both within and beyond the North San Jose Policy Area. It could be mixed use.

These basic retail types, Amenity Retail and, Neighborhood Retail Centers, and Regional Retail Centers, are further described from a retail industry perspective for background information in Attachment No. 2, Retail Types Anticipated in North San Jose.

Recent and Current Retail Projects

Recent and current neighborhood and regionally-oriented retail developments that currently serve the North San Jose Policy Area are all located either on the periphery or outside of the Policy Area. They have access to large numbers of consumers, and, in some cases, excellent freeway visibility. These projects include:

- Rivermark – a grocery-anchored neighborhood shopping center on Montague Expressway in Santa Clara, just west of the border of San Jose with Santa Clara,

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

- Costco – a warehouse grocery store at Automation Drive approximately 2,500 feet east of the Plan Area border,
- “@ First” – a general-merchandise anchored retail center with office and hotel uses at North First Street and Hwy 237 which is now under construction, and,
- A home-improvement store-anchored center – a proposed home improvement center with a small, associated pad retail area located at I-880 and Brokaw which is currently in the permit process.

In addition, ten sites, comprising approximately 64 acres, within the Policy Area have been rezoned to allow up to approximately 6,700 residential units. Five of the projects are mixed-use projects and include retail commercial on the ground floor on a portion of their street frontage.

4. RETAIL SITES

The Taskforce was provided with information on the characteristics of good retail sites from a market perspective, and on the criteria of good visibility, good access, adequate size and demand. It is critically important to site retail well, and to avoid retail uses on sites that do not meet the site criteria.

Identified Sites

The sites identified as potential retail sites are listed on the chart, Attachment 6, North San Jose Preliminary Planning List of Most Likely Retail Sites, and most are depicted graphically in aerial photos (Attachment 7, Selected Aerials, Most Likely Retail Sites). The City does not own any of the properties referenced in this report, and their potential redevelopment for retail use has not yet been discussed with the all affected property owners. Some may elect not to develop retail. Future market factors may also impact development on any of these sites. These issues are discussed in more detail in the section below entitled “Identifying Retail Sites Now: Rationale and Limitations”.

The listed sites were identified in two ways. Some had been included in a Memorandum to the San Jose City Council from the Office of Economic Development in the fall of 2007. These specific sites were identified in partial response to the Mayor’s initiative to increase retail sales tax as a way to reduce the City’s structural deficit. The remaining sites were identified through staff and consultant assessment, seeking sites that meet the retail site criteria described below.

Two potential retail locations were identified in the North San Jose Plan’s “Core Area”, the section of the North San Jose along North First Street from Brokaw

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

Road to Montague Expressway where the most dense office / industrial development is anticipated:

- 1) Trimble on either side of North First Street; and
- 2) Plumeria, west of North First Street.

These Core Area locations are particularly desirable for amenity retail development provided that retail is consistent with the developer's and/or property owner's development plans. It is expected that any retail in the Core Area will be incidental to the primary office and industrial uses it supports, but that retail at these particular locations could be larger than the 4,000 square foot to 20,000 square foot format anticipated in other, less dense locations within or outside the Core.

Residential developers may elect to include small amounts of retail in their projects as amenities. The Taskforce process did not identify sites for this type of retail, except to suggest that it should be well-located according to the site requirements (below) with the expectation that it would serve both the project residents and customers from nearby areas, and conform to the proposed retail design guidelines. Smaller amounts of "amenity retail" linked to commercial/industrial office development are also anticipated throughout the Core Area based upon the decisions of individual property owners or developers.

Site Requirements for Retail Centers

Retail sites must meet certain criteria in order to perform well. These criteria are also important for amenity retail sites. The most important requirement is the location. Retail developers generally will not consider sites unless the locations excel in the following areas.

- Visibility. The first criteria is visibility to large numbers of potential customers, primarily motorists, as quantified in average vehicles per day that pass by the site. Ideally the site is visible to motorists from several directions so that the customer can see the retail and anticipate turning into the site or make a mental note to return on another trip. The direction of the traffic at peak hours is important to specific retail uses that cater to morning, evening or daytime traffic.
- Access. The more opportunities a customer has to make a spontaneous decision to enter the shopping area the better the site. Access needs to be so convenient that the customer will make repeat visits to the retail site because it is easy to access.
- Size and dimensions. The site has to be large enough in acreage and dimensions (length and width of site) for a developer to lay out retail

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

buildings of varying sizes for a mix of tenants who can co-locate and create synergy that draws more customers.

- Market demand. Sites have to be within close proximity to customers that can support the overall amount of retail development, considering the competition within the trade area.

Identifying Retail Sites Now: Rationale and Limitations

There are several reasons to begin identifying retail sites now even though most retail development will not happen until some point in the future when there is adequate market demand to support it.

- Retail is an increasingly important amenity and an important factor in location decisions for both individuals as well as companies. Research confirms that company and employee location decisions are motivated in part by amenities that help attract and retain workers. Retail, and the environment or “place” it creates is one of these amenities. Therefore retail can be one element that makes North San Jose desirable as a location for businesses and residents.
- There are a limited number of sites that can support retail development in North San Jose and these sites are in private ownership. Because land values associated with specific land uses can change quickly in a short period of time, and because retail land uses may be less valuable than those for office or housing depending on the market cycle, it is important to have a land use framework in place to implement the long-term vision for retail development. It will be critical for City planners to understand whether a site is a strong or weak retail location and to plan accordingly, allowing for the owner’s preferences and the market realities at any given point in time.
- Strong retail sites (with visibility, accessibility, appropriate dimensions and nearby market demand) can attract stronger developers and a more diverse array of retail tenants. Such strong sites are likely to function more successfully over time. Since the priority in North San Jose is to use land for employment, it makes sense to focus retail where it will perform best and provide the best service, using relatively few well-chosen sites.

The Taskforce Guiding Principles lays out criteria they recommend the City use in identifying the best locations for retail over this long range-planning horizon, recognizing that the private sector parties, owners and developers, will respond given their own priorities.

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

Existing Retail in North San Jose

There is an existing base of North San Jose businesses which generate sales tax that is important to San Jose and to a wide variety of customers. This includes business-to-business sales, internet sales, and a variety of non-traditional stores. Many of these stores sell home improvement materials and supplies such as tile and stone and electronics. Among these, the existing Fry's store may be the single best known retailer. Although these businesses are generally so atypical that they are overlooked in traditional retail studies, they are an important contributor to the economy and to sales tax.

CONCLUSION

This report summarizes retail information provided to the North San Jose Neighborhoods Planning Taskforce and the Retail Guiding Principles which the Taskforce sees as a planning tool for the implementation of retail growth in North San Jose.

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

ATTACHMENTS AND ILLUSTRATIONS

Attachment 1

North San Jose Plan Area - Existing and Projected Development

<u>Use</u>	<u>Existing</u>	<u>Projected</u> Est by 2014 Phase 1 (2)	<u>Projected</u> Est 2015-2030) Phases 2-4	<u>Total</u> <u>Projected</u>	<u>Total:</u> <u>Existing &</u> <u>Projected</u> Est by 2030
Industrial, R&D (1) Bldg area in SF	44,895 K	7,000 K	19,700 K	26,700 K	71,595 K
Employees	66,000	21,840	61,460	83,300	149,300
Dwelling Units (3)	9,042	8,000	24,000	32,000	41,042
Population	20,000	14,160	42,480	56,640	76,640
Retail Bldg Area in SF	14,800	122,360			

Core of Plan Area (dense high tech office area within North San Jose Plan Area)

<u>Use</u>	<u>Existing</u>	<u>Projected</u> Est by 2014 Phase 1	<u>Projected</u> Est 2015-2030 Phases 2-4	<u>Total New</u>	<u>Total:</u> <u>Existing &</u> <u>Projected</u> Est by 2030
Industrial, R&D (1) Bldg Area in SF	7,000 K	1,000 K	15,000 K	16,000 K	23,000 K
Employees	21,840	3,120	46,798	49,918	71,758
Dwelling Units (3)	0	0	6,000	6,000	6,000
Population	0	0	10,620	10,620	10,620
Retail Bldg Area in SF	0				

Sources: North San Jose EIR, Pg 7, Planning and Building Permits, Planning Division Staff

Notes for Chart, above

(1) The Plan allows 23M sf of new industrial space in the Core, with the option of adding up to 4M sf of industrial space that is otherwise designated for areas outside the Core.

(2) The Vision North San Jose Plan is market driven. The estimated build out by phase based on development activity as of July 2007 is:

Phase 1, Industrial 2014

Phase 1, Residential Dwelling Units 2012

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

Phase 2, Industrial

2014 and later

(3) Residential Density in the Plan Area range as follows:

Mixed - use areas	55+ du / acre
145 acres	55+ du / acre
45 acres	65 du / acre
200 acres and up	55 du / acre minimum
85 acres	90 du / ac minimum
	20+ du / ac

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

Attachment No. 2
Retail Types Anticipated in North San Jose

The retail industry recognizes a variety of retail types and sizes for retail in mixed used developments and in retail centers. The short summary that follows provides generic, industry information on the retail types that are anticipated in North San Jose. The information is provided for reference only.

1. Amenity Retail in Large Developments

Amenity retail in the context of this report refers to retail that is part of or incidental to an office or residential development. The retail provides convenient services for people living and working in the development, as well as consumers from beyond the immediate project. It is typically not destination retail, and it does not offer an alternative to the neighborhood shopping center. Amenity retail could include a range of smaller shops and eateries (approximately 1000 – 4000 square feet each). The emphasis is on convenience. Furthermore, the total amount of amenity retail in a given project is typically a small, ranging usually from 4,000 to 20,000 square feet, depending on the ability of the site to attract and park customers from outside the development.

2. Retail Centers

This subsection refers to development where retail is the sole use on the site, or where retail is the primary or a primary use in conjunction with other uses.

Neighborhood Shopping Center

The Neighborhood Shopping Center is a very well defined, typical center that ranges from 30,000 to 100,000 square feet, and is anchored by a grocery and drug store. Customers are typically within a three-minute drive time of the center. Sometimes neighborhood centers include larger merchandise stores for apparel, household goods, party goods. They may include a bank, eateries, and a range of service retail. The total square footage of a neighborhood center could be as much as 200,000 square feet. In the North San Jose Policy Area where there are few existing restaurants, the neighborhood shopping center could include two or three restaurants of 5,000 square feet or more.

Regional Shopping Center

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

Regional denotes a center that draws from people from a ten-minute drive time or more. It provides a setting attractive to retailers whose stores are at least ten minutes apart and often more. The building areas are designed to accommodate larger tenants as well as small shops and the overall building area is typically in excess of 500,000 square feet. The type of stores can vary to meet market demands. Examples of centers with regional draw include Best Buy at McCarthy Ranch, outlets including Burlington Coat Factory, Gap and Marshall's at The Great Mall, and Nordstrom and Macys at Westfield/Valley Fair, etc.

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

Attachment 3
Basic Assumptions and Limiting Conditions

Any market analysis must address assumptions and limiting conditions so that the conclusions can be modified as circumstances change over time. This report is based on, and limited to, information that is currently and readily available, and on the following general assumptions and qualifications. Limitations that are more specific to the North San Jose market projections are included in the text of the report itself.

1. The analysis assumes that neither the local nor national economy will experience a worsening of the current economic downturn. If an unforeseen change occurs in the economy, the conclusions contained herein may no longer be valid.
2. The basic sources of pertinent statistical information quoted in this report are sufficiently careful and conservative estimates to be reasonable and useful for planning purposes.
3. Retail development is subject to market conditions and financial feasibility. More extensive analysis, well beyond the scope of this report, must be done when an actual development is being planned. The feasibility analysis will include, but is not limited to, a demand study that addresses demographics and shopper preferences, a retail competition study, information on the availability of tenants, the cost of site acquisition, lease rates, relocation burdens, traffic impacts, off-site costs, and the remediation of toxics (if any). For purposes of this report it has been assumed that market and financial feasibility will not be limiting.

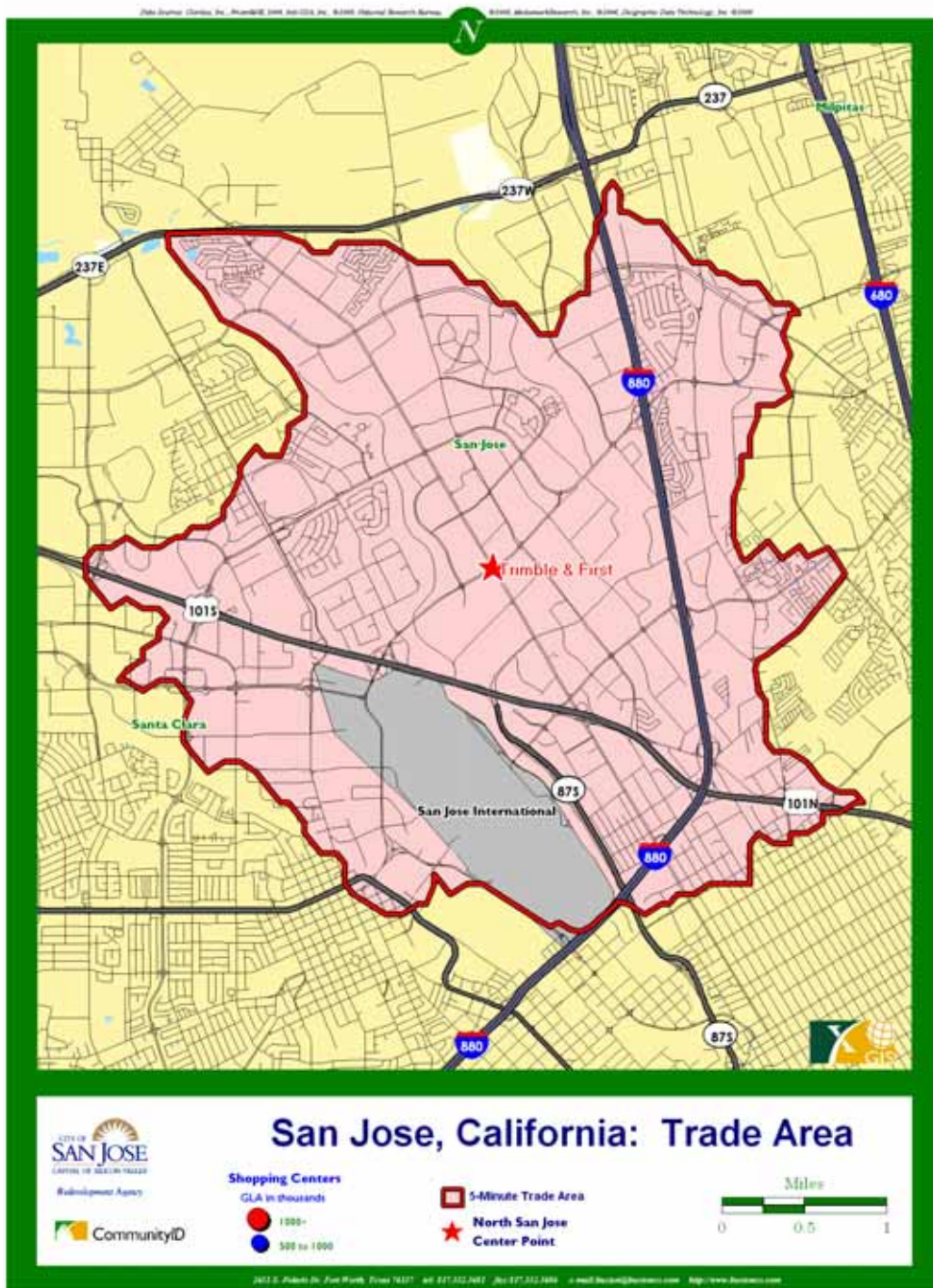
DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

Attachment 4
Five-Minute Trade Area Map

Neighborhood Retail Drivetime: 5 minutes

- Current demand: \$ 511 million
- Future demand: \$ 2 billion

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL



Attachment 5
Current and Projected Retail Demand before Competitive Analysis

Current and Projected Demographics & Demand

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

Before Competitive Analysis Local Retail Trade Area				
Trade Potential Variables	2007 Residential Profile	2007 Work Place Profile	2030 Residential Profile	2030 Work Place Profile
Estimated Household/Worker Count	8,567	149,081	39,647	232,381
Retail Trade Potential	\$511M	\$300M	\$2.1B	\$465M

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

Attachment 6

North San Jose – Preliminary Planning List of Most Likely Retail Sites

Acreage & APN	Owner	Comments: Access / Adjacencies and Existing Zoning
1. <u>Brokaw: Zanker to 880</u>		
	Multiple owners	Proximity to Fry's existing store
2. a. <u>Trimble: north side of street, both sides of First Street</u>		
	Multiple	SW corner: existing restaurant group high tension electric lines
2. b.. <u>Plumeria both sides of street from Orchard Parkway to Zanker</u>		
	Multiple	
3. <u>NEC River Oaks / First St continuing to Zanker</u>		
Portion of site is zoned commercial use	Moitozo	Adjacent to Agnews. Existing Commercial (retail) Zoning is 88,000 sf at 1 st /River Oaks 10,000 sf Zanker / River Oaks 30,000 sf live/work on 1 st st next to Northpark
4. <u>NW corner of Montague and Trimble</u>		
	Orchard Properties	880 proximity, visibility/ ingress
5. <u>Potential site: S/E corner of HWY 237 and Zanker</u>		
60 ac	VTA (bus barn)	Potential for regional serving; freeway visibility, good side of hwy
6. <u>NWC of Hwy 237 and First St.</u>		
13.3 Ac 015-39-046	Cisco	Compliments @ First retail center; freeway visibility
7. <u>SWC of Montague and 880</u>		
13 ac	Blackstone	Freeway visibility

DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

Attachment No. 7
Selected Aerials, Most Likely Retail Sites

This attachment includes the aerials presented to the Taskforce as some of the sites most likely to be appropriate for retail centers.

7.1 Brokaw: Some Portion between Zanker and 880



DRAFT
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REPORT ON RETAIL

7.3 North East Corner of Riveroaks and N. First Street



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REPORT ON RETAIL

7.4 North West Corner of Montague and Trimble



DRAFT
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REPORT ON RETAIL

7.5 South East Corner of HWY 237 and Zanker



DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

7.6 North West Corner of HWY 237 and N. First Street



DRAFT
NORTH SAN JOSE NEIGHBORHOODS PLANNING TASKFORCE
REPORT ON RETAIL

7.7 South West Corner of Montague and 880

