



# TRANSIT-ORIENTED DEVELOPMENT FEASIBILITY STUDY

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# 1. INTRODUCTION

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## 1.1 TRANSIT-ORIENTED DEVELOPMENT

Transit-oriented development (TOD) has gained considerable momentum over the past two decades. Nationally, over 100 TOD projects and plans have been constructed and enacted. Most often, these projects are built in conjunction with rail stations.<sup>1</sup> However, several TODs have also developed around bus corridors and stations.

Generally, there is no universally agreed-upon definition for transit-oriented development. Indeed, single-use buildings have been constructed adjacent to transit stations, while retaining the existing density limitations and parking requirements. Those transportation agencies that have internal definitions for TOD generally agree that the principle involves higher land use densities, pedestrian-friendly spaces, a mix of land uses, and an environment that generally encourages transit ridership.<sup>2</sup>

For Suisun City, many of the assets for creating a TOD environment are already in place. There is a mix of retail, food service, service commercial, office, institutional, and industrial uses within the downtown area. In addition, there are plans to develop a new waterfront hotel, and over 52,000 square feet of new office and commercial space is under construction or under plan review.

The downtown area has an existing train station along the Capitol Corridor, which is a commuter rail route jointly operated by Amtrak and the State of California. In addition, the station serves as a hub for regional bus routes.

However, the rail and bus lines serving Suisun City do not operate as frequently as is typical with other TOD plan areas. The Capitol Corridor operates only 16 daily round-trips, with the shortest headway of 40 minutes between trains. Meanwhile, the most frequent bus service runs at 30 minute headways only during peak commute hours. In addition, Suisun City's existing downtown development pattern has a large number of low density blocks and industrial uses that do not necessarily encourage pedestrian activity.

Creating a TOD pattern within the downtown area can potentially address opportunities throughout Suisun City's economy, particularly with commercial, office, and residential uses. Concurrently, while the most frequently stated objective of TODs from the perspective of transit agencies is to increase ridership, a TOD pattern can also help to create a pedestrian-oriented environment while also creating a new type of neighborhood in Suisun City.

This report examines different potential land uses for the downtown area, and relates them to their potential for fitting into a transit-oriented pattern. Chapters 2, 3, and 4 focus on the market feasibility for "basic industries" and local-serving retail uses. Chapter 5 assesses three

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<sup>1</sup> Cervero, Robert and others; *Transit-Oriented Development in the United States: Experiences, Challenges, and Prospects*; Transportation Research Board; Washington D.C.; 2004; pp 5-7.

<sup>2</sup> Ibid

different TOD scenarios, and identifies opportunity sites and potential new land uses for the downtown area. Chapter 6 compares the fiscal impacts from these three TOD scenarios, while Chapter 7 outlines some implementation steps that can be undertaken in order to facilitate transit-oriented development in Suisun City.

## **1.2 SUMMARY OF REPORT FINDINGS**

### **ECONOMIC BASE**

The Solano County economy showed tremendous job growth between 1992 and 2005, with much of the growth concentrated in construction, retail, and health services. The more recent downturn in the economy has severely impacted construction and retail activity. Suisun City had an employment base of approximately 4,500 jobs, with high concentrations of jobs in construction, wholesale trade, retail trade, and various professional and administrative support services.

Population growth in Suisun City generally lagged behind surrounding communities, but was about on pace with the countywide average.

### **GROWTH PROJECTIONS**

Solano County was projected to add between 7,600 and 21,500 jobs during the 10-year period from 2005 through 2015. Much of the growth expected to occur in retail trade, health care, professional services, manufacturing, and transportation and warehousing. Construction was also projected to grow significantly by the California EDD, but recent slowdowns in building activity suggest that the growth will likely be closer to the lower projection by ABAG in this sector.

Suisun City during this same time period is projected to add between 332 and about 900 jobs, which is consistent with the differences between the EDD and ABAG projections. This creates an overall demand for between 294,100 and 840,000 square feet of business space. The largest projected growth sectors are in retail trade, health care, and food service.

The regional market conditions have shown a generally stronger market for business space in the Fairfield market area than elsewhere in Solano County. However, interviews with commercial brokers indicate that the regional market conditions, as well as local conditions in Fairfield and Suisun City, have declined over the last few years. Suisun City has several key office vacancies in One Harbor Center, and a total of about 276,900 square feet of vacant business space citywide. Most of these vacancies are in industrial parcels. Despite these regional conditions, downtown Suisun City has several commercial projects underway, including a waterfront hotel project and a downtown courtyard plaza.

### **RETAIL MARKET**

Retailers in Suisun City generate about \$117 million in total sales. Most of these sales are in grocery stores and gasoline service stations. On the demand side, Suisun City households generate approximately \$220 million in annual retail spending demand. This means that there is at least \$103 million in unmet spending demand that currently leaves the community.

Recapturing this retail spending will occur with additional retail development, but the potential to support new establishments only occurs when the unmet demand is large enough. Some of the supportable stores that can work for a downtown TOD include specialty retail (including florist, jeweler, and miscellaneous specialty retail), food stores, furniture/home furnishings stores, and household appliances/electronics.

In addition, as new households move into the downtown area, the market support for existing and new retail establishments also increases. Store types with relatively low market thresholds to support new establishments include eating places, food stores, and miscellaneous specialty stores.

The key to retail attraction potential for the downtown area is if the district becomes the focus for the City's retail attraction efforts. This is important because of existing retail vacancies elsewhere in Suisun City, and the planned Wal-Mart store in eastern Suisun City. A sustainable and market-driven approach to retail development would tie new retail space to downtown housing and office development.

## **EXISTING TRANSIT RIDERSHIP**

The Capital Corridor has an annual ridership of approximately 124,700 total trip-ends. This averages out to about 171 daily weekday round-trips. The most popular destination/originating station for Suisun station is Sacramento with over 32,000 annual trip-ends. Other popular destinations include Emeryville, Martinez, Oakland-Jack London, and Richmond.

## **TRANSIT-ORIENTED DEVELOPMENT SCENARIOS**

The development scenarios included three downtown scenarios, in addition to potential development at three other sites. Three downtown TOD scenarios focus on a study area within a 1/4-mile distance of the train station. This is generally regarded as an acceptable walking distance from a transit stop. The land parcels within this area combine for a total of 16.8 acres. The largest land use categories represented in this acreage are industrial, commercial, parking, and office. Two of the other sites are located north of Highway 12, while the other site is located along Civic Center Boulevard.

The overall goal for the scenarios was to work towards creating high densities, and in-filling vacant and underutilized spaces. For example, all three downtown scenarios regard Main Street as an ideal location for mixed use development that combines ground level commercial spaces with residential units above. These scenarios also address future street alignments, such as the planned connection between Sacramento Street and Highway 12. The other two downtown scenarios address potential opportunities for converting existing industrial uses and creating a residential neighborhood in downtown Suisun City, or creating a node for R&D/flex space uses.

### **In-Fill Development Scenario**

This scenario primarily looks at infilling vacant parcels and underutilized spaces. The potential projects identified for this scenario include a total of 7.0 acres, with an emphasis on office, residential, and mixed uses. The resultant development pattern includes 76 housing units, 24,900 square feet of commercial space, and 144,200 square feet of office space. This scenario also includes potential dedications for right-of-way access to Spring Street from Benton Court.

### **Residential Conversion Scenario**

This scenario expands on the infill development scenario and assumes further conversion of existing light industrial uses into residential development. In addition, this scenario includes a mix of office uses adjacent to the train station. The 10 potential projects identified for this scenario encompass a total of 10.1 acres of new and/or converted land uses. The development pattern in this scenario includes 154 housing units, 24,900 square feet of commercial space, and 144,200 square feet of office space.

### **R&D/Flex Space Conversion Scenario**

This scenario assumes that the existing light industrial uses parallel to the rail right-of-way will be converted into higher density R&D/flex spaces. This would be compatible with the proposed realignment of Sacramento Street that will connect with a new off-ramp from Highway 12. The 10 potential projects for this scenario would result in 67,700 square feet of R&D/flex spaces, 24,900 square feet of commercial space, 144,200 square feet of office space, and 76 housing units.

### **Hoffman Site Development Scenario**

This scenario encompasses the largest land area with 31.6 acres of vacant property. At TOD densities, the Hoffman site could support a greater square footage of new uses, primarily because the vacant acreage is greater than the potentially converted acreage from any of the three downtown development scenarios. A potential development for the site would encompass a combination of housing, retail, and service/commercial uses. This scenario assumes that the site can potentially support 420 housing units. In addition, service/commercial uses would potentially support over 128,500 square feet of new building space, while retail uses would support nearly 61,000 square feet of new retail space.

### **Future Planned Unit Development (PUD) Site**

This 5.3-acre site encompasses a total of 17 parcels, and covers the area bounded by Lotz Way to the north, and Civic Center Boulevard to the east. Bay Drive and Driftwood Drive are streets running east-west that run through the site. This scenario assumes that the 5.3-acre site could potentially support 133 housing units, as well as about 13,700 square feet of retail space.

### **Denverton Curve Site Development Scenario**

The Denverton Curve site was the subject of a previous fiscal study in 2007. That analysis identified the Denverton Curve site as a potential location for office development, or



replacement site for parking if the Park & Ride lot is converted to other land uses. The development scenario for the Denverton Curve site assumed about 29,500 square feet of office development.

### **Assessment of Scenarios**

In general, all of the development scenarios face considerable short-term market impediments. This is due to regional market conditions that limit the potential for housing, office, and industrial development, as well as expanded supply of retail space in Suisun City. With these conditions in mind, these development scenarios should be viewed as long-term options with limited market support until conditions improve, and empty spaces in Suisun City and elsewhere in the region are absorbed.

The commercial square footage specified in all of the scenarios will need to account for the considerable expansion of retail square footage coming online in Suisun City, as well as the existing vacancies at Marina Center and Sunset Center. A new owner recently acquired the Marina Center and has developed a conceptual design to revitalize the center. With this under consideration, the market conditions for new retail development (aside from projects already proposed for the downtown area) will need to account for the plentiful supply of vacant commercial spaces already available throughout Suisun City.

Development of office uses adjacent to the train station will likely need to be phased in over several years with multiple buildings, unless a large single-user can be attracted to the site. The likeliest large-scale user would be related to health care. Combining office uses with entertainment uses such as a movie theater can potentially shorten the overall time frame for converting the existing Park & Ride lot into other uses. However, developers are generally not interested in smaller theater configurations, and theater operators face considerable competitive pressures from the larger theaters operating in Solano County.

R&D/flex space and housing are both long-term options, with buildout under these scenarios not occurring until approximately 2020 for housing, and 2032 for the R&D/flex space.

### **Other Potential Downtown TOD Projects**

- Entertainment Uses (at Park & Ride lot)
- Travis Court Commercial Spaces
- Sacramento Street Reuse and Realignment
- Main Street Parking Lot Reuse

### **FISCAL ANALYSIS**

In terms of total revenues, the Hoffman site produces the highest total due to its larger overall development square footage and distribution of uses. While the Hoffman site also creates the largest expenditures, it also generates the highest amount of net revenues, net present value, and redevelopment tax increment, compared to the other development sites.

Among the three downtown study area scenarios, Residential Conversion scenario produces the highest annual total due to higher receipts from service fees and inter-governmental agencies. This scenario also produces the highest annual expenditures, so the R&D/Flex Space scenario will actually result in the highest net revenue with \$377,600 annually by 2032.

## **IMPLEMENTATION APPROACHES**

### **Physical Environment Enhancements**

- Explore options for enhancing pedestrian activity within downtown Suisun City
- Address access options for connecting Sacramento Street to Benton Court and the train station
- Address options for connecting Spring Street and Railroad Avenue with Benton Court

### **Business Attraction Activities**

- Target industry attraction efforts towards sectors that support and expand upon regional strengths
- Coordinate retail attraction efforts
- Identify options for attracting health care uses
- Identify alternative locations for transitioning existing industrial uses from downtown locations

### **Policy Considerations**

- Prioritize in-fill development and right-of-way access issues
- Consider options for using form-based codes as a mechanism for creating desired urban form

### **Site Preparation**

- Explore development options for underutilized properties
- Explore shared parking options within downtown Suisun City
- Explore options for replacement of Park & Ride lot parking spaces, and joint development options with CalTrans

### **Funding Resources**

- Identify funding resources for transit-oriented development and related enabling activities. These sources include local funds, State Community Development Block Grant (CDBG) funds, California Infrastructure and Economic Development Bank (I-Bank), and federal transportation funds.

## 2. ECONOMIC BASE ANALYSIS

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This section examines how the Suisun City job base is structured and evaluates the community's existing role within the Solano County regional economy. In addition, the Economic Base Analysis assesses the roles of different industries within the region in order to identify opportunities for Suisun City. Identifying these roles is important because many of Suisun City's best economic growth and diversification opportunities come first from those industries that have shown the best growth potential elsewhere in the region.

Some of the major findings from the Economic Base Analysis are summarized below.

- Between 1992 and 2005, Solano County's growing economic base industries (i.e., those with high employment concentration, and positive job growth) were largely concentrated in construction, retail, and health services. More recent economic downturns on a regional basis have severely impacted construction and retail activity, which would likely have a concurrent impact on jobs. Declining economic base industries (those industries that are potential business retention targets), include food and beverage manufacturing. Emerging industries are largely concentrated in wholesale distribution, manufacturing activity, information technology, and professional services categories.
- The estimated 2005 employment in the Suisun City ZIP code totals about 4,500 jobs. This employment is concentrated in construction, wholesale trade, retail trade, and various professional and administrative support services.

### 2.1 POPULATION AND LABOR FORCE

Suisun City is in the middle of a rapidly growing economic region in Solano County. In recent years, the county has attracted significant population growth. Initially, this population growth was largely driven by affordable housing. However, in more recent years, the economy has diversified and added exported-oriented industries, which in turn added to the demand for housing.

Suisun City saw its population grow by 15 percent from 22,704 to 26,118 between 1990 and 2000. By 2007, the population had grown by another 7.1 percent with a population of nearly 28,000 residents. These growth rates are roughly the same as the averages for Solano County (16.2 percent from 1990 to 2000, and 7.6 percent between 2000 and 2007), but below the average growth rates for neighboring Fairfield, which saw its population increase by over 22 percent between 1990 and 2000, and another 9.6 percent between 2000 and 2007.

Between 1990 and 2000, Solano County's population growth outpaced the average growth rate for California, but since 2000, Solano County's population growth has lagged behind the statewide average.

**TABLE 2-1  
POPULATION AND POPULATION GROWTH RATE**

City	Population			1990 to 2000	2000 to 2007	Percent of
Population	1990	2000	2007	Percent Change	Percent Change	County Total
Suisun City	22,704	26,118	27,980	15.0%	7.1%	6.6%
Fairfield	78,650	96,178	105,421	22.3%	9.6%	24.8%
Rio Vista	3,316	4,571	7,823	37.8%	71.1%	1.8%
Solano Co.	339,471	394,930	424,823	16.3%	7.6%	100.0%
California	29,758,213	33,873,086	37,662,518	13.8%	11.2%	-

Source: ADE, data from California Department of Finance

Since 2000, Suisun City’s labor force has increased at a faster rate than its residential population. This indicates that the demographics of the population have included a greater proportion of working age residents. The rate of increase for the labor force was similar in Suisun City, Fairfield, Rio Vista, and Solano County as a whole. These communities and the county also saw the labor force increase at a faster rate than California as a whole. This means that Solano County’s population growth since 2000 has increasingly consisted of residents that participate in the labor force.

**TABLE 2-2  
LABOR FORCE TRENDS, SUISUN CITY AND SURROUNDING COMMUNITIES**

	2000	2006	Change	2000 to 2006 Percent Change	Annual Growth Rate
Suisun City	12,900	14,000	1,100	8.5%	1.4%
Fairfield	42,200	46,000	3,800	9.0%	1.4%
Rio Vista	2,100	2,300	200	9.5%	1.5%
Solano	185,100	202,100	17,000	9.2%	1.5%
California	16,024,300	17,029,300	1,005,000	6.3%	1.0%

Source: ADE, data from California EDD LMID

## 2.2 SUISUN CITY’S EMPLOYMENT BASE

Suisun City’s employment distribution provides a context for comparison with the rest of the region, and a basis from which to identify potential sectors for business attraction and expansion. Overall, Suisun City has a diverse job base for a community of its size, with jobs distributed across a variety of different sectors. The overall job base for Suisun City in 2005 totaled approximately 4,500 jobs.<sup>3</sup>

<sup>3</sup> Job data for Suisun City comes from the U.S. Census ZIP Business Patterns and entails the sum job total for ZIP Code 94534. At the time of the analysis, the latest available data dated back to 2005. The distribution by industry sector represents an estimate because the ZIP Business Patterns data only reports the detailed job totals within ranges.

**TABLE 2-3  
2005 EMPLOYMENT BY INDUSTRY GROUP**

NAICS Code	Industry Group	Suisun City 2005		Solano County 2005		California 2005		Location Quotient (County)	Location Quotient (State)
		Employment (Estimated)	Percent of Total	Employment	Percent of Total	Employment	Percent of Total		
	Total, all industries	4,519	100.0%	105,145	100.0%	12,889,230	100.0%	1.00	1.00
11	Agriculture, forestry, fishing and hunting	4	0.1%	1,943	1.8%	380,907	3.0%	0.05	0.03
21	Mining	0	0.0%	362	0.3%	22,077	0.2%	0.00	0.00
22	Utilities	0	0.0%	488	0.5%	55,738	0.4%	0.00	0.00
23	Construction	632	14.0%	13,402	12.7%	900,979	7.0%	1.10	2.00
31-33	Manufacturing	296	6.6%	9,250	8.8%	1,499,260	11.6%	0.75	0.56
42	Wholesale trade	624	13.8%	4,335	4.1%	671,782	5.2%	3.35	2.65
44-45	Retail trade	573	12.7%	18,384	17.5%	1,651,556	12.8%	0.72	0.99
48-49	Transportation and warehousing	8	0.2%	4,294	4.1%	413,812	3.2%	0.05	0.06
51	Information	45	1.0%	1,654	1.6%	470,262	3.6%	0.64	0.28
52	Finance and insurance	405	9.0%	3,641	3.5%	640,832	5.0%	2.59	1.80
53	Real estate and rental and leasing	56	1.2%	2,629	2.5%	283,812	2.2%	0.50	0.57
54	Professional and technical services	224	5.0%	3,048	2.9%	958,969	7.4%	1.71	0.67
55	Management of companies and enterprises	412	9.1%	1,212	1.2%	222,963	1.7%	7.91	5.27
56	Administrative and waste services	445	9.8%	7,074	6.7%	956,706	7.4%	1.46	1.33
61	Educational services	69	1.5%	1,375	1.3%	240,058	1.9%	1.17	0.82
62	Health care and social assistance	222	4.9%	14,231	13.5%	1,299,851	10.1%	0.36	0.49
71	Arts, entertainment, and recreation	75	1.7%	2,139	2.0%	237,437	1.8%	0.81	0.90
72	Accommodation and food services	286	6.3%	10,343	9.8%	1,227,467	9.5%	0.64	0.66
81	Other services, except public administration	141	3.1%	5,328	5.1%	686,298	5.3%	0.62	0.59
99	Non-classified industry	0	0.0%	11	0.0%	68,465	0.5%	0.00	0.00

Source: ADE, data from IMPLAN CEW county employment database and U.S. Census ZIP Code Business Patterns

## **EMPLOYMENT BY INDUSTRY SECTOR**

The employment data in this section is defined by industry sector using the North American Industry Classification System (NAICS). This system describes and assigns industry definitions in a hierarchical structure where more general industry definitions are described using short two-digit numerical codes, while more specific and detailed industry definitions are assigned using longer numbers. The more detailed three, four, and six-digit NAICS codes are all subsets of the more general NAICS codes.

For example, Retail Stores are defined at the two-digit level using NAICS code 44, while Motor Vehicle and Parts Dealers (NAICS code 441) are a three-digit subset of that industry definition.

Extrapolating the data by sector, Suisun City has the largest proportion of its employment base in include construction, wholesale trade, as well as retail trade. Each of these sectors accounts for over 500 jobs, and these jobs are particularly vulnerable in light of the economic recession that began in 2007. The prevalence of construction activity tied into the rapid growth in Solano County beginning in the 1990s clearly contributes to the presence of construction jobs in Suisun City.

Compared to Solano County, Suisun City has an unusually large concentration of jobs in the wholesale trade, finance and insurance, and management services. With each of these industry groups, the employment concentration (as defined by the location quotient) is approximately twice the countywide average or higher. Other industry groups with above average concentrations of employment include construction, professional services, administrative services, and educational services. This indicates a diverse mix of industrial and office jobs in Suisun City.

Industry groups with comparatively low concentrations of employment in Suisun City include agriculture, mining, manufacturing, utilities, retail trade, transportation and warehousing, information, real estate, health care, arts and recreation, accommodations and food service, and miscellaneous services.

### **2.3 REGIONAL EMPLOYMENT TRENDS**

Between 1992 and 2005, the regional job growth of Solano County significantly outpaced the statewide growth trend. The region's job base increased by 48 percent during this period, which was more than double the statewide growth rate of about 23 percent. Growth occurred across a broad variety of different industry sectors. Among the major industry groups, only utilities showed any loss of jobs during this period.

**TABLE 2-4  
SOLANO COUNTY EMPLOYMENT TRENDS BY INDUSTRY, 1992 TO 2005**

NAICS Code	Description	1992 Employment	2005 Employment	California 1992 Employment	California 2005 Employment	Location Quotient 1992	Location Quotient 2005	1992 to 2005 Employment Change	Percent Change	Shift-Share
	<b>Total, all industries</b>	<b>70,902</b>	<b>105,145</b>	<b>10,465,220</b>	<b>12,889,230</b>	<b>1.00</b>	<b>1.00</b>	<b>34,243</b>	<b>48.3%</b>	<b>25.1%</b>
	Agriculture, forestry, fishing and									
11	hunting	1,525	1,943	353,845	380,907	0.64	0.63	418	27.4%	19.8%
21	Mining	292	362	32,642	22,077	1.32	2.01	70	24.0%	56.3%
22	Utilities	779	488	67,033	55,738	1.72	1.07	-291	-37.4%	-20.5%
23	Construction	6,208	13,402	497,358	900,979	1.84	1.82	7,194	115.9%	34.7%
31-33	Manufacturing	6,790	9,250	1,794,077	1,499,260	0.56	0.76	2,460	36.2%	52.7%
42	Wholesale trade	1,796	4,335	551,881	671,782	0.48	0.79	2,539	141.4%	119.6%
44-45	Retail trade	15,093	18,384	1,376,968	1,651,556	1.62	1.36	3,291	21.8%	1.9%
48-49	Transportation and warehousing	3,019	4,294	357,468	413,812	1.25	1.27	1,275	42.2%	26.5%
51	Information	1,214	1,654	399,404	470,262	0.45	0.43	440	36.2%	18.5%
52	Finance and insurance	2,385	3,641	555,393	640,832	0.63	0.70	1,256	52.7%	37.3%
53	Real estate and rental and leasing	1,463	2,629	239,505	283,812	0.90	1.14	1,166	79.7%	61.2%
54	Professional and technical services	2,266	3,048	681,717	958,969	0.49	0.39	782	34.5%	-6.2%
	Management of companies and									
55	enterprises	808	1,212	222,758	222,963	0.54	0.67	404	50.0%	49.9%
56	Administrative and waste services	3,188	7,074	607,205	956,706	0.77	0.91	3,886	121.9%	64.3%
61	Educational services	589	1,375	151,773	240,058	0.57	0.70	786	133.4%	75.3%
62	Health care and social assistance	9,370	14,231	989,256	1,299,851	1.40	1.34	4,861	51.9%	20.5%
	Arts, entertainment, and									
71	recreation	1,992	2,139	178,185	237,437	1.65	1.10	147	7.4%	-25.9%
72	Accommodation and food services	7,946	10,343	942,624	1,227,467	1.24	1.03	2,397	30.2%	-0.1%
	Other services, except public									
81	administration	4,179	5,328	457,272	686,298	1.35	0.95	1,149	27.5%	-22.6%
99	Non-classified industry	0	11	8,856	68,465	0.00	0.02	11	-	-

Source: ADE, data from IMPLAN CEW county employment database

In general, the largest numbers of new jobs during this period were added in primarily local-serving sectors such as retail trade, construction, health care, and accommodations/food services activity. Each of these sectors added more than 2,000 jobs between 1992 and 2005, with construction adding more than 7,000 jobs during this period. The significant population growth in Solano County is the primary driver for these types of industries.

“Basic” (i.e., export-driven) industries generally have the greatest potential to attract wealth into a region, and among these industries, the largest job growth occurred in manufacturing, wholesale trade, transportation and warehousing, and administrative services. Each of these sectors added more than 1,000 jobs between 1992 and 2005.

## 2.4 ASSESSING REGIONAL ECONOMIC ROLES

To assess the roles that different economic sectors have within the regional economy, ADE ranked the industries in Solano County on the basis of two key economic indicators—job growth and employment concentration relative to the State of California. Noting the recent performance and economic roles for specific industries within the region will help identify potential target industries for Suisun City’s business attraction efforts, as well as potentially vulnerable industries that might require outreach and retention resources. These industries are shown at a more detailed three-digit NAICS code level in Table 2-5. The economic roles based on these indicators fall into four categories, which are described as follows:

- **Growing Economic Base Industries:** These industries have shown recent job growth and have an above-average employment concentration. They constitute the strength of the economy and represent opportunities for growth in other areas such as supplier industries.
- **Emerging Industries:** These sectors have shown recent job growth, but still have a below-average employment concentration. These industries represent potential future growth opportunities because they have not yet accumulated a high concentration of employment. Industries in this category could be considered attractive business attraction targets.
- **Declining Economic Base Industries:** These industries have an above-average concentration of employment, but have shown recent job losses. They represent strong industries in a region that has shown some recent vulnerability and could be considered business retention targets.
- **Declining Non-Base Industries:** These industries have shown recent job losses and have below-average employment concentration. They do not have an especially notable regional presence and do not have growth prospects as strong as the industries in the other categories.



## **GROWING ECONOMIC BASE INDUSTRIES**

Between 1992 and 2005, Solano County's growing economic base industries (i.e., those with high employment concentration, and positive job growth) were largely concentrated in sectors related to construction, retail, real estate services, and health services. The slowdown in residential construction activity indicates that the construction sectors have shown considerably more vulnerability since 2007. In addition, the growing economic base industries included manufacturing sectors such as petroleum/coal-based products, chemical manufacturing, nonmetallic mineral products, and fabricated metals. Other individual industries contributing prominently to Solano County's growing economic base include food service, amusement services, and repair services.

Typically, growing economic base industries represent the starting point from which an economic development programs should begin, because these industries not only lead the regional economy but also provide opportunities for suppliers and allied industries.

## **EMERGING INDUSTRIES**

In addition to having a wealth of growing economic base industries, between 1992 and 2005, the region had numerous emerging industries. Emerging industries are largely concentrated in wholesale distribution, manufacturing activity, financial services, management and administrative services, information, and professional services categories.

Some of these activities such as wholesale trade and professional services are already very well represented in Suisun City, and thus represent attractive expansion opportunities, provided that those businesses can weather the recessionary market conditions that have prevailed since 2007. Generally, emerging industries are considered good business attraction and expansion targets because they represent future potential and could eventually transition into the leading economic base industries for a locality or region.

## **DECLINING ECONOMIC BASE INDUSTRIES**

The declining economic base industries with above-average employment concentrations and job losses during this period were limited in number, but still significant because of the large number of existing jobs that they represent. Declining economic base industries (those industries that are potential business retention targets), include food and beverage manufacturing, utilities, and heavy construction. These activities are not heavily concentrated in Suisun City, so their vulnerability does not represent a broad threat to Suisun City's economic base.

The issue for the City is to be aware of which prominent businesses might be affected by larger economic trends and market declines. Often, business retention efforts will focus on these types of businesses and seek to address any competitiveness issues that can be addressed at the local level. Depending on the importance of these industries to Suisun City's employment base, the City can proactively address these issues as needed.

## **DECLINING NON-BASE INDUSTRIES**

The range of industries in the region with lower concentrations of employment and declining employment includes a broad range of manufacturing, information, transportation, and miscellaneous service industries.

For those businesses in Suisun City that are in this category, the City needs to be aware of which ones are important to the local economy and also successfully compete in their markets. This process of getting to know the important businesses in Suisun City is an important process in deciding how to allocate economic development resources. These important local businesses might be worth targeting for business retention activities despite what the regional indicators might show. Activities would include planning for and developing new business spaces that can help businesses maintain their competitiveness.

**TABLE 2-5  
ECONOMIC ROLES OF SOLANO COUNTY INDUSTRIES (LISTED BY NAICS CODE), 1992 TO 2005**

<b>DECLINING ECONOMIC BASE INDUSTRIES (High Concentration, Negative Growth)</b>		<b>GROWING ECONOMIC BASE INDUSTRIES (High Concentration, Positive Growth)</b>	
221	Utilities	212	Mining, except oil and gas
237	Heavy and civil engineering construction	213	Support activities for mining
311	Food manufacturing	236	Construction of buildings
312	Beverage and tobacco product manufacturing	238	Specialty trade contractors
445	Food and beverage stores	324	Petroleum and coal products manufacturing
		325	Chemical manufacturing
		327	Nonmetallic mineral product manufacturing
		332	Fabricated metal product manufacturing
		425	Electronic markets and agents and brokers
		441	Motor vehicle and parts dealers
		442	Furniture and home furnishings stores
		444	Building material and garden supply stores
		447	Gasoline stations
		448	Clothing and clothing accessories stores
		451	Sporting goods, hobby, book and music stores
		452	General merchandise stores
		484	Truck transportation
		485	Transit and ground passenger transportation
		493	Warehousing and storage
		516	Internet publishing and broadcasting
		531	Real estate
		532	Rental and leasing services
		533	Lessors of nonfinancial intangible assets
		562	Waste management and remediation services
		622	Hospitals
		623	Nursing and residential care facilities
		624	Social assistance
		713	Amusements, gambling, and recreation
		722	Food services and drinking places
		811	Repair and maintenance
<b>DECLINING NON-BASE INDUSTRIES (Low Concentration, Negative Growth)</b>		<b>EMERGING INDUSTRIES (Low Concentration, Positive Growth)</b>	
113	Forestry and logging	111	Crop production
211	Oil and gas extraction	115	Agriculture and forestry support activities
313	Textile mills	314	Textile product mills
315	Apparel manufacturing	321	Wood product manufacturing
316	Leather and allied product manufacturing	326	Plastics and rubber products manufacturing
322	Paper manufacturing	331	Primary metal manufacturing
323	Printing and related support activities	333	Machinery manufacturing
334	Computer and electronic product manufacturing	335	Electrical equipment and appliance mfg.
336	Transportation equipment manufacturing	423	Merchant wholesalers, durable goods
337	Furniture and related product manufacturing	424	Merchant wholesalers, nondurable goods
339	Miscellaneous manufacturing	443	Electronics and appliance stores
446	Health and personal care stores	453	Miscellaneous store retailers
481	Air transportation	454	Nonstore retailers
483	Water transportation	488	Support activities for transportation
487	Scenic and sightseeing transportation	492	Couriers and messengers
511	Publishing industries, except Internet	512	Motion picture and sound recording industries
517	Telecommunications	515	Broadcasting, except Internet
519	Other information services	518	ISPs, search portals, and data processing
523	Securities, commodity contracts, investments	522	Credit intermediation and related activities
711	Performing arts and spectator sports	524	Insurance carriers and related activities
812	Personal and laundry services	541	Professional and technical services
813	Membership associations and organizations	551	Management of companies and enterprises
		561	Administrative and support services
		611	Educational services
		621	Ambulatory health care services
		712	Museums, historical sites, zoos, and parks
		721	Accommodation

Source: ADE, data from IMPLAN CEW county employment database

## **2.5 ECONOMIC BASE CONCLUSIONS**

Suisun City is situated in a regional economy that has thrived and grown tremendously since the early 1990s. The City's job base is diverse enough to not depend on any specific industry group, yet it has certain gaps compared to the regional trends. Given how growth has occurred across a broad range of different industry sectors within Solano County, Suisun City has the potential to build on its existing strengths, while also tapping into the regional growth to further diversify its business base.

Some potential areas of concern for Suisun City are the dependence on population growth of some of Solano County's strongest growth industries. As the regional and national housing market has slowed down from its 2005 peaks and contracted severely since 2007, this will also slow down industries that are driven by population growth. Moreover, Solano County's population growth has begun to lag behind the statewide growth trends.

Housing is typically a cyclical market, and Solano County's history of expanding upon its "basic" export-oriented industries indicates that over the long term, housing demand will return. This is an important consideration for implementing a vision for higher densities with a new mix of land uses within downtown Suisun City. Because the business base in downtown Suisun City has historically been concentrated with industrial businesses, this presents a challenge for the community as it balances taking advantage of business opportunities created by existing industrial uses, and accommodating the opportunities that office uses have created across the rest of the region.

## **3. REGIONAL GROWTH PROJECTIONS**

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In order to project future job growth and land demand out to 2015, ADE used two regional growth scenarios, one based on the California Employment Development Department (EDD) growth projections, and the other one based on the growth scenarios by the Association of Bay Area Governments (ABAG). In general, the EDD projections use more aggressive growth assumptions than the ABAG numbers. This method is generally the most accurate, but because projected employment is calculated from recent employment trends with a time lag of up to three years, the projections could be either higher or lower than actual. In addition, the factors used in this method do not account for year-to-year fluctuations in industrial vacancy rates.

### **3.1 SOLANO COUNTY JOB GROWTH PROJECTION**

In order to project the future growth, the analysis first estimated the employment growth for Solano County, and then allocated the incremental jobs added for Suisun City.<sup>4</sup> After calculating the number of new jobs, the analysis applied standard factors on the number of square footage required per employee in order to calculate the square footage and land acreage demand.

#### **EDD-BASED GROWTH PROJECTION**

Table 3-1 projects growth rates for Solano County non-farm industry groups for the ten-year period 2005 to 2015. Using the California EDD projections, Solano County expects to add over 21,400 jobs during this period, which equates to 1.9 percent annualized growth. Compared to Solano County's average annual growth rate between 1992 and 2005, which exceeded 3.1 percent, this is a relatively conservative growth projection overall.

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<sup>4</sup> The growth projections used the IMPLAN CEW (formerly ES202) employment data as the 2005 baseline. EDD and ABAG use different baseline employment totals, and this data did not include all employment sectors at a detailed level (3-digit or higher NAICS). The IMPLAN CEW dataset includes all sectors at the more detailed 6-digit NAICS level description.

**TABLE 3-1  
SOLANO COUNTY EMPLOYMENT PROJECTIONS, 2005 TO 2015**

<b>NAICS Code</b>	<b>Description</b>	<b>ABAG Annual Growth Rate Projection</b>	<b>EDD Annual Growth Rate Projection</b>	<b>Projected 2015 Jobs (ABAG Growth Rates)</b>	<b>Projected 2015 Jobs (EDD Growth Rates)</b>	<b>2005 to 2015 Job Growth (ABAG)</b>	<b>2005 to 2015 Job Growth (EDD 10-Year)</b>
	Total, all industries			112,786	126,607	7,641	21,462
11	Agriculture, forestry, fishing and hunting	0.0%	0.5%	1,943	2,040	0	97
111	Crop production	0.0%	0.5%	1,083	1,137	0	54
112	Animal production	0.0%	0.5%	126	132	0	6
113	Forestry and logging	0.0%	0.5%	0	0	0	0
114	Fishing, hunting and trapping	0.0%	0.5%	28	29	0	1
115	Agriculture and forestry support activities	0.0%	0.5%	706	741	0	35
21	Mining	0.0%	0.0%	362	362	0	0
211	Oil and gas extraction	0.0%	0.0%	15	15	0	0
212	Mining, except oil and gas	0.0%	0.0%	129	129	0	0
213	Support activities for mining	0.0%	0.0%	218	218	0	0
22	Utilities	0.6%	2.6%	516	632	28	144
221	Utilities	0.6%	2.6%	516	632	28	144
23	Construction	0.4%	3.2%	13,984	18,387	582	4,985
236	Construction of buildings	0.4%	5.1%	4,214	6,652	175	2,613
237	Heavy and civil engineering construction	0.4%	5.1%	1,030	1,626	43	639
238	Specialty trade contractors	0.4%	1.9%	8,740	10,109	364	1,733
31-33	- Manufacturing	0.6%	1.2%	9,785	10,372	535	1,122
311	Food manufacturing	0.6%	1.3%	1,573	1,691	86	204
312	Beverage and tobacco product manufacturing	0.6%	1.3%	507	545	28	66
313	Textile mills	0.6%	1.3%	1	1	0	0
314	Textile product mills	0.6%	1.3%	89	96	5	12
315	Apparel manufacturing	0.6%	1.3%	7	8	0	1
316	Leather and allied product manufacturing	0.6%	1.3%	1	1	0	0
321	Wood product manufacturing	0.6%	1.0%	291	303	16	27
322	Paper manufacturing	0.6%	1.3%	20	22	1	3
323	Printing and related support activities	0.6%	1.3%	122	131	7	16
324	Petroleum and coal products manufacturing	0.6%	1.3%	483	520	26	63
325	Chemical manufacturing	0.6%	1.3%	2,477	2,662	136	321
326	Plastics and rubber products manufacturing	0.6%	1.3%	344	370	19	45
327	Nonmetallic mineral product manufacturing	0.6%	1.0%	696	724	38	66
331	Primary metal manufacturing	0.6%	1.0%	26	28	1	3
332	Fabricated metal product manufacturing	0.6%	1.0%	1,512	1,572	83	143
333	Machinery manufacturing	0.6%	1.0%	631	656	35	60
334	Computer and electronic product manufacturing	0.6%	1.0%	32	33	2	3
335	Electrical equipment and appliance mfg.	0.6%	1.0%	153	160	8	15
336	Transportation equipment manufacturing	0.6%	1.0%	273	284	15	26
337	Furniture and related product manufacturing	0.6%	1.0%	259	270	14	24
339	Miscellaneous manufacturing	0.6%	1.0%	288	299	16	27
42	Wholesale trade	0.6%	2.0%	4,586	5,264	251	929
423	Merchant wholesalers, durable goods	0.6%	2.0%	2,701	3,100	148	547
424	Merchant wholesalers, nondurable goods	0.6%	2.0%	1,067	1,225	58	216
425	Electronic markets and agents and brokers	0.6%	2.0%	818	939	45	166

**TABLE 3-1  
SOLANO COUNTY EMPLOYMENT PROJECTIONS, 2005 TO 2015**

<b>NAICS Code</b>	<b>Description</b>	<b>ABAG Annual Growth Rate Projection</b>	<b>EDD Annual Growth Rate Projection</b>	<b>Projected 2015 Jobs (ABAG Growth Rates)</b>	<b>Projected 2015 Jobs (EDD Growth Rates)</b>	<b>2005 to 2015 Job Growth (ABAG)</b>	<b>2005 to 2015 Job Growth (EDD 10-Year)</b>
44-45	- Retail trade	0.7%	1.4%	19,658	21,137	1,274	2,753
441	Motor vehicle and parts dealers	0.7%	1.8%	2,837	3,160	184	507
442	Furniture and home furnishings stores	0.7%	1.8%	858	955	56	153
443	Electronics and appliance stores	0.7%	1.8%	545	607	35	97
444	Building material and garden supply stores	0.7%	1.8%	1,708	1,902	111	305
445	Food and beverage stores	0.7%	0.0%	3,396	3,176	220	0
446	Health and personal care stores	0.7%	1.8%	717	799	46	128
447	Gasoline stations	0.7%	1.8%	866	965	56	155
448	Clothing and clothing accessories stores	0.7%	1.8%	2,452	2,730	159	437
451	Sporting goods, hobby, book and music stores	0.7%	1.8%	814	906	53	145
452	General merchandise stores	0.7%	1.4%	4,433	4,784	287	638
453	Miscellaneous store retailers	0.7%	1.8%	782	871	51	140
454	Nonstore retailers	0.7%	1.8%	253	282	16	45
48-49	- Transportation and warehousing	0.6%	2.6%	4,543	5,563	249	1,269
481	Air transportation	0.6%	2.6%	38	47	2	11
482	Rail transportation	0.6%	2.6%	0	0	0	0
483	Water transportation	0.6%	2.6%	11	13	1	3
484	Truck transportation	0.6%	2.6%	1,345	1,647	74	376
485	Transit and ground passenger transportation	0.6%	2.6%	1,167	1,429	64	326
486	Pipeline transportation	0.6%	2.6%	5	6	0	1
487	Scenic and sightseeing transportation	0.6%	2.6%	11	13	1	3
488	Support activities for transportation	0.6%	2.6%	501	614	27	140
492	Couriers and messengers	0.6%	2.6%	181	222	10	51
493	Warehousing and storage	0.6%	2.6%	1,280	1,568	70	358
51	Information	0.4%	0.6%	1,726	1,751	72	97
511	Publishing industries, except Internet	0.4%	0.6%	471	478	20	27
512	Motion picture and sound recording industries	0.4%	0.6%	242	246	10	14
515	Broadcasting, except Internet	0.4%	0.6%	149	151	6	8
516	Internet publishing and broadcasting	0.4%	0.6%	126	128	5	7
517	Telecommunications	0.4%	0.6%	395	401	16	22
518	ISPs, search portals, and data processing	0.4%	0.6%	342	347	14	19
519	Other information services	0.4%	0.6%	0	0	0	0
52	Finance and insurance	0.8%	1.4%	3,961	4,176	320	535
521	Monetary authorities - central bank	0.8%	1.4%	0	0	0	0
522	Credit intermediation and related activities	0.8%	1.4%	2,178	2,296	176	294
523	Securities, commodity contracts, investments	0.8%	1.4%	216	228	17	29
524	Insurance carriers and related activities	0.8%	1.4%	1,543	1,627	125	209
525	Funds, trusts, and other financial vehicles	0.8%	1.4%	23	24	2	3
53	Real estate and rental and leasing	0.8%	1.8%	2,860	3,135	231	506
531	Real estate	0.8%	1.8%	2,127	2,331	172	376
532	Rental and leasing services	0.8%	1.8%	703	770	57	124
533	Lessors of nonfinancial intangible assets	0.8%	1.8%	30	33	2	5
54	Professional and technical services	0.8%	2.6%	3,316	3,929	268	881

**TABLE 3-1  
SOLANO COUNTY EMPLOYMENT PROJECTIONS, 2005 TO 2015**

<b>NAICS Code</b>	<b>Description</b>	<b>ABAG Annual Growth Rate Projection</b>	<b>EDD Annual Growth Rate Projection</b>	<b>Projected 2015 Jobs (ABAG Growth Rates)</b>	<b>Projected 2015 Jobs (EDD Growth Rates)</b>	<b>2005 to 2015 Job Growth (ABAG)</b>	<b>2005 to 2015 Job Growth (EDD 10-Year)</b>
541	Professional and technical services	0.8%	2.6%	3,316	3,929	268	881
55	Management of companies and enterprises	0.8%	2.6%	1,318	1,562	106	350
551	Management of companies and enterprises	0.8%	2.6%	1,318	1,562	106	350
56	Administrative and waste services	0.8%	2.4%	7,696	8,936	622	1,862
561	Administrative and support services	0.8%	2.5%	7,084	8,373	572	1,861
562	Waste management and remediation services	0.8%	0.0%	612	563	49	0
61	Educational services	0.9%	3.6%	1,503	1,964	128	589
611	Educational services	0.9%	3.6%	1,503	1,964	128	589
62	Health care and social assistance	0.9%	2.6%	15,558	18,415	1,327	4,184
621	Ambulatory health care services	0.9%	2.8%	4,503	5,413	384	1,294
622	Hospitals	0.9%	2.8%	6,315	7,590	539	1,814
623	Nursing and residential care facilities	0.9%	2.8%	2,738	3,290	234	786
624	Social assistance	0.9%	1.5%	2,004	2,122	171	289
71	Arts, entertainment, and recreation	0.9%	1.6%	2,338	2,496	199	357
711	Performing arts and spectator sports	0.9%	1.6%	257	274	22	39
712	Museums, historical sites, zoos, and parks	0.9%	1.6%	28	30	2	4
713	Amusements, gambling, and recreation	0.9%	1.6%	2,054	2,192	175	313
72	Accommodation and food services	0.9%	0.6%	11,308	11,034	965	691
721	Accommodation	0.9%	1.2%	762	784	65	87
722	Food services and drinking places	0.9%	0.6%	10,547	10,250	900	603
81	Other services, except public administration	0.9%	0.2%	5,825	5,452	497	124
811	Repair and maintenance	0.9%	0.2%	2,174	2,035	185	46
812	Personal and laundry services	0.9%	0.2%	1,016	951	87	22
813	Membership associations and organizations	0.9%	0.2%	822	769	70	17
814	Private households	0.9%	0.2%	1,813	1,697	154	38

Source: ADE, data from U.S. Census, IMPLAN CEW employment database, Association of Bay Area Governments 2007 Projections, and California EDD LMID



The largest regional growth sectors using the California EDD projections are construction, retail trade, and health care services. Each of these sectors is projected to have an incremental growth of more than 2,700 jobs.

Other industry sectors projected to add more than 1,000 new jobs in Solano County include manufacturing, transportation and warehousing, and administrative services. Professional and technical services will add close to another 900 jobs through 2015.

### **ABAG-BASED GROWTH PROJECTIONS**

In addition to the EDD growth scenario, a lower growth scenario was also projected by applying data from ABAG's projections for Solano County to the detailed employment figures from the CEW employment database. The ABAG projections are generally lower than the California EDD projections, and substantially lower than the recent growth trends for Solano County. It should also be noted that the ABAG growth projections are updated biannually, which is more frequent than the EDD projections.

Under this scenario, the incremental job growth for Solano County expects to total over 7,600 jobs between 2005 and 2015. Compared to the EDD projections, the ABAG growth projections show lower growth in most sectors, and with a much lower growth projection for construction, transportation and warehousing, and health care services.

The slower growth projection for construction activity is probably more accurate to the actual market conditions in Solano County given the severe slowdown in the regional housing market. Only with food services and accommodations does the ABAG projection show a higher growth rate than the EDD projection.

## **3.2 REGIONAL AND LOCAL MARKET CONDITIONS**

The regional market conditions for business space in Solano County has generally varied since 2000, but the strongest conditions in the county have been in the areas surrounding Suisun City. Market data from Colliers International indicates that the business park market in Fairfield was strong through 2006, with low vacancy rates between 2001 (5 percent) and the beginning of 2006 (2.9 percent). During this same time period, Benicia and Vacaville had higher vacancy rates, with Vacaville reporting a vacancy rate of 11.5 percent at the beginning of 2006. Like Fairfield, the Benicia and Vacaville business park markets have had declining vacancy rates, rising land values (generally peaking around \$8.00 per square foot), and continued expansion.

Interviews with commercial brokers indicate that since this time, the office market in Solano County has experienced a significant downturn. There are office vacancies in Suisun City, with several key vacancies in the downtown One Harbor Center office building.

Within Suisun City, the Loopnet commercial real estate database showed a total of 16 spaces for lease and 9 land parcels for sale in late-2007. The available leasable space in Suisun City totaled over 276,900 square feet. The majority of this square footage was industrial, and 217,800 square feet were listed through the Lambie Industrial Park. Over 34,000 of the

available business space was retail, while the remaining 22,900 square feet was office space. Close to half of the vacant office space was in the One Harbor Center, which was not a healthy indicator for the market conditions in that segment for the downtown district. The land area for the parcels for sale totaled over 24,700 square feet, with an additional 302 acres available (most of which are currently used for agriculture).

**TABLE 3-2  
AVAILABLE SUISUN CITY BUSINESS SPACES BY LISTING**

Property	Type of Availability	Square Footage	Acreage	Lease Rate	Purchase Price	Property Type	Vacant Land
NE Corner of Main St and Solano St	Lease	23,939		\$27.00		Retail	No
Lambie Industrial Park	Lease	217,800		\$9.00		Industrial	No
Heritage Park Shopping Center	Lease	2,680				Retail	No
Heritage Park Shopping Center	Lease	1,300				Retail	No
Heritage Park Shopping Center	Lease	1,400				Retail	No
401 Railroad Avenue	Lease	1,400		\$13.80		Office	No
401 Railroad Avenue	Lease	600		\$15.00		Office	No
Suisun Commerce Center	Lease	2,174		\$12.60		Office	No
333 Sunset	Lease	1,150		\$24.00		Office	No
333 Sunset	Lease	4,550		\$24.00		Office	No
333 Sunset	Lease	4,700		\$24.00		Office	No
One Harbor Center	Lease	5,087		\$33.00		Office	No
One Harbor Center	Lease	1,301		\$33.00		Office	No
One Harbor Center	Lease	4,751		\$26.40		Retail	No
One Harbor Center	Lease	1,978		\$33.00		Office	No
409 Railroad Avenue	Lease	2,100		\$7.80		Industrial	No
Hotel Site	Sale		2.5		\$1,900,000	Commercial/Other	Yes
Marine Center Sales & Service	Sale	10,500			\$699,000	Retail	No
McCoy Creek Commercial Condos	Sale	1,475			\$398,250	Office	No
McCoy Creek Commercial Condos	Sale	1,475			\$398,250	Office	No
McCoy Creek Commercial Condos	Sale	1,900			\$513,000	Office	No
McCoy Creek Commercial Condos	Sale	1,900			\$513,000	Office	No
APN 46-010-09 and 32-200-14	Sale		300.0		\$15,000,000	Agricultural	Yes
McCoy Creek Mixed Use Development	Sale	3,263			\$656,000	Retail	No
Wings Landing 300 Acre Duck Club							
Delta Property	Sale	4,200			\$1,500,000	Special Purpose	No

Source: ADE, data from Solano EDC/Loopnet

**TABLE 3-3  
AVAILABLE SUISUN CITY BUSINESS SPACE BY CATEGORY**

Available Space by Category	Space for Lease (Sq.Ft.)	Space for Sale (Sq.Ft.)	Total Available Space
Industrial	219,900	0	219,900
Office	22,940	6,750	29,690
Retail	34,070	13,763	47,833
Special Purpose	0	4,200	4,200
Total	276,910	24,713	301,623

Source: ADE, data from Solano EDC/Loopnet

### 3.3 SUISUN CITY GROWTH ALLOCATION

Suisun City has a total current job base of approximately 4,519 jobs. According to ABAG's projected employment allocation, Suisun City is expected to capture between 3.8 percent and 4.7 percent of the total employment growth in Solano County, depending on the industry sector. Under the higher EDD growth scenario, Suisun City would expect to add just over 900 jobs through 2015. The largest growth expected to occur in construction, retail trade,

and health care services, with each of these sectors adding more than 100 jobs. The broad economic downturn makes this scenario less realistic.

Under the less aggressive ABAG growth scenario, Suisun City is expected to add 332 jobs through 2015. The largest growth sectors include retail trade, health care, and accommodations and food services.

## **SQUARE FOOTAGE AND ACREAGE DEMAND**

The square footage demand created by different industry sectors varies by facility type. The employment density can range from as low as one employee per 2,000 square feet for warehouse-distribution to a high of one employee per 500 square feet for office-oriented sectors such as professional services.

From the EDD job projected job growth, Suisun City is expected to absorb over 840,000 square feet of business space. Much of this is expected to occur in construction, retail trade, and health care, with each of these sectors creating potential demand for more than 100,000 square feet of business space. It should be noted that construction businesses will significantly vary in terms of the amount of space that they need to maintain, depending on how the business operates. In addition, the demand for retail space is more of a projection of expected growth, and does not take into account the specific household spending characteristics and unmet demand that exists in the local market area. A more thorough discussion of business attraction potential for retail businesses is found in Chapter 4.

Using an average floor area ratio (FAR) of .40 to .50 for industrial uses, and .25 for office and commercial uses, the California EDD projection translates into approximately 60.7 acres of land demand in Suisun City. This assumes that all of the new jobs will create potential for new space. In actuality, many of these new jobs will likely be accommodated through existing vacancies, which in Suisun City currently totals over 276,900 square feet of space.

Using the ABAG job projections, Suisun City will absorb approximately 294,100 square feet of business space. The largest demand for new square footage will come from manufacturing, retail trade, health care, and accommodations and food service. Each of these sectors under the ABAG projections are expected to add at least 25,000 square feet of new business demand.

Under this lower growth scenario, the land absorption through 2015 is projected to total 23.5 acres, again assuming that the new job growth will require new business space. Given the existing volume of business vacancies, the ABAG projection will likely require a substantially lower acreage of new development.

**TABLE 3-4  
ESTIMATED SUISUN CITY EMPLOYMENT AND PROJECTED GROWTH, 2005 TO 2015**

<b>Industry Code</b>	<b>Industry Code Description</b>	<b>Estimated 2005 Suisun City Jobs (ZIP Business Patterns)</b>	<b>Suisun City Percent of Countywide Job Growth (ABAG Projection)</b>	<b>2015 Countywide Growth Increment (ABAG 10-Year Projection)</b>	<b>2015 Countywide Growth Increment (EDD Projection)</b>	<b>2015 Suisun City Job Growth (ABAG 10-Year Projection)</b>	<b>2015 Suisun City Job Growth (EDD Projection)</b>
	Total	4,519		7,654	21,475	332	903
23	Construction	632	3.8%	582	4,985	22	192
31	Manufacturing	296	3.9%	535	1,122	21	43
42	Wholesale trade	624	3.9%	251	929	10	36
44	Retail trade	573	4.5%	1,274	2,753	58	124
48	Transportation & warehousing	8	3.9%	249	1,269	10	49
51	Information	45	3.8%	72	97	3	4
52	Finance & insurance	405	4.0%	320	535	13	21
53	Real estate & rental & leasing	56	4.0%	231	506	9	20
54	Professional, scientific & technical service	224	4.0%	268	881	11	35
55	Management of companies & enterprises	412	4.0%	106	350	4	14
56	Admin, support, waste mgt, remediation ser	445	4.0%	622	1,862	25	74
61	Educational services	69	4.7%	128	589	6	28
62	Health care and social assistance	222	4.7%	1,327	4,184	62	197
71	Arts, entertainment & recreation	75	4.7%	199	357	9	17
72	Accommodation & food services	286	4.7%	965	691	45	32
81	Other services (except public administration)	141	4.7%	497	124	23	6

Source: ADE, data from U.S. Census, IMPLAN CEW employment database, Association of Bay Area Governments 2007 Projections, and California EDD LMID

**TABLE 3-5  
ESTIMATED SUISUN CITY SQUARE FOOTAGE DEMAND BY INDUSTRY GROUP, 2005 TO 2015**

Industry Code	Industry Code Description	Sq.Ft. Per Empl.	Floor Area Ratio (FAR)	2015 Cumulative Sq.Ft. Demand (ABAG 10-Year Growth Rate)	2015 Cumulative Sq.Ft. Demand (EDD Annual Growth Rate)	2015 Cumulative Acreage Demand (ABAG 10-Year Growth Rate)	2015 Cumulative Acreage Demand (EDD Annual Growth Rate)
	Total			294,116	840,671	23.5	60.7
23	Construction	1,000	0.40	22,384	191,734	1.3	11.0
31	Manufacturing	1,400	0.40	29,036	60,838	1.7	3.5
42	Wholesale trade	2,000	0.50	19,439	71,959	0.9	3.3
44	Retail trade	1,000	0.25	57,500	124,275	5.3	11.4
48	Transportation & warehousing	2,000	0.50	19,255	98,278	0.9	4.5
51	Information	500	0.25	1,381	1,871	0.1	0.2
52	Finance & insurance	500	0.25	6,398	10,709	0.6	1.0
53	Real estate & rental & leasing	500	0.25	4,620	10,112	0.4	0.9
54	Professional, scientific & technical service	500	0.25	5,356	17,611	0.5	1.6
55	Management of companies & enterprises	500	0.25	2,130	7,003	0.2	0.6
56	Admin, support, waste mgt, remediation ser	500	0.25	12,431	37,231	1.1	3.4
61	Educational services	700	0.25	4,216	19,374	0.4	1.8
62	Health care and social assistance	700	0.25	43,631	137,567	4.0	12.6
71	Arts, entertainment & recreation	1,000	0.25	9,369	16,744	0.9	1.5
72	Accommodation & food services	1,000	0.25	45,301	32,457	4.2	3.0
81	Other services (except public administration)	500	0.25	11,668	2,910	1.1	0.3

Source: ADE, data from U.S. Census, IMPLAN CEW employment database, Association of Bay Area Governments 2007 Projections, California EDD LMID, and Natleson

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## 4. RETAIL MARKET ANALYSIS

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The retail market analysis in this section estimates the household demand for retail goods, and compares this to the sales patterns by Suisun City retail stores. This information provides a baseline estimate of how Suisun City's retail stores currently attract local and regional retail spending. It identifies which store categories comprise the City's strongest regional shopping attractors, and which categories have shortcomings that can potentially be addressed with new retail store attraction. This is an important consideration for identifying business attraction opportunities for downtown Suisun City because it identifies the degree to which new retail space in the downtown district can potentially address existing shortcomings.

The results of the retail analysis indicate that Suisun City loses a significant portion of its household retail spending to stores located in the surrounding communities. Suisun City's retail base is largely limited to local-serving shopping centers, with no regional retail uses that can attract significant numbers of shoppers from outside of the City.

Nearby communities such as Fairfield and Vacaville have built up substantial regional retail centers that are designed to attract spending from a large market area. Fairfield has both an auto mall and an enclosed Westfield shopping center, while Vacaville has developed large-scale power centers along Interstate 80.

Some of the major findings from the Retail Market Analysis are summarized below.

- Suisun City's total retail sales (after accounting for nontaxable sales) comes out to about \$117 million. Grocery stores (\$37 million) and gasoline service stations (\$33 million) account for over half of the total retail sales in Suisun City. Restaurants constitute another \$20 million in retail sales.
- None of the other retail categories generated sales above \$10 million. The retail categories with more than \$500,000 in annual retail sales are as follows: family clothing, drug and proprietary stores, office supplies, miscellaneous specialty retail, liquor stores, furniture/home furnishings, nurseries and garden supply stores, lumber and other building materials, hardware stores, auto parts, and boats/motorcycles.
- Suisun City's current household retail spending demand totals \$220 million. This means that the retail spending leakage by Suisun City households totals \$103 million. Retail leakage represents unmet market demand that currently goes to other communities. This unmet demand represents an existing shortfall as well as a market opportunity.
- The most undersupplied retail categories in Suisun City are new cars (\$51 million) and department/other general merchandise stores (\$33 million). Opportunities to attract new car dealerships to Suisun City are limited because of the City's close proximity to the Fairfield Auto Mall. Opportunities for general merchandise stores can support a new

store from local household spending, and can be further enhanced by attracting spending from residents of neighboring communities, commuters, and visitors.

- Suisun City also has numerous spending gaps in other retail categories, some of which are sufficient to support new retail establishments. The only retail group where Suisun City retailers currently capture the majority of the local household spending is Food, Eating, and Drinking.
- Store categories with more than \$500,000 in unmet demand are as follows: women's apparel, men's apparel, family clothing, shoe stores, drug stores, gift and novelty stores, sporting goods, music stores, books and stationery, office supplies/computer equipment, jewelry, miscellaneous specialty retail, furniture/home furnishings, appliances and electronics, nurseries and garden supply stores, used car dealerships, and boats/motorcycles. Small-scale establishments in some of these categories could potentially work for a transit-oriented development in the downtown Suisun City, which currently accounts for only about 3.9 percent of the total taxable sales in Suisun City.

Many specific types of retail development in Suisun City cannot be supported only by local demand. Many of Suisun City's largest retail leakages occur in retail store categories that often locate in large-scale retail centers. These regional retail centers have not located in Suisun City, and supporting those types of retail centers would require successfully capturing retail spending from Fairfield and Rio Vista residents.

## **4.1 RETAIL MARKET ANALYSIS OVERVIEW**

This retail market analysis consists of two main parts: an estimate of household retail spending and a comparison of overall spending potential and sales by Suisun City retail establishments.

The household retail spending totals are calculated from an analytical model that ADE developed in-house. This model estimates spending for 40 different store types and 100 product categories. The taxable sales data is an annual total listed by retail category. The businesses listed in the analysis encompass all of the retail businesses operating in Suisun City. The retail sales data comes directly from the California State Board of Equalization sales tax allocation records, and the data was audited by the Hinderliter, deLlamas Companies (HdL). Because certain retail items, such as food and prescription drugs, are not taxable, the analysis includes a conversion that calculates nontaxable sales.

As described later in this section, retail leakage represents the gap between household spending by Suisun City households and retail sales by local retail establishments. This leakage represents an existing shortfall, as well as an opportunity for both retail expansion and possible attraction.

## **4.2 SUISUN CITY'S RETAIL SETTING**

Suisun City has a diverse base of retail stores, with a primarily local-serving orientation. The community is located in close proximity to Fairfield and Vacaville, both of which have very



strong concentrations of regional retail centers. Neighboring Fairfield has a large auto mall and an enclosed Westfield shopping mall, while Vacaville has focused on developing a dense corridor of big-box power centers along I-80 and on the site of the former Nut Tree shopping center. Solano County's retail market has grown significantly alongside the increased population, and serves a broader regional market area that includes Napa County and commuters along the I-80 corridor.

Suisun City faces numerous competitive challenges because its larger neighbors have a sufficient population base to support larger scale stores and shopping centers, and have already developed the regional retail assets that attract spending from outside of those communities. Suisun's existing retail shopping areas are oriented towards serving local household demand. Most of the retail store types represented in Suisun are already supplied in other communities, which limits the potential for existing stores to attract retail spending from outside of Suisun City.

Suisun City has three primary retail shopping areas – Old Town Suisun, the Marina Center, and the two community-level shopping centers along Sunset Avenue – Heritage Park Shopping Center and Sunset Center. Old Town Suisun's retail base primarily consists of small-scale restaurants and specialty retail stores. Its pedestrian-orientation and waterfront setting make it an attractive location for drawing visitors from outside of the area.

The Marina Shopping Center is a 99,500 square foot neighborhood-level shopping center, originally developed in 1971.<sup>5</sup> The center has a diverse mix of retail stores and spaces used for religious services; however the shopping center itself is hampered by a relatively high number of vacancies and the lack of any large spaces for anchor stores. The largest space available is 10,000 square feet. Even though the center is listed as having had a renovation in 1999, some of the common areas and vacant spaces appear to have deferred maintenance and require attention to make the center attractive to prospective tenants. A new owner recently acquired Marina Center, and has developed a conceptual plan for revitalizing the property.

The two shopping centers along Sunset Avenue account for the majority of Suisun City's existing retail sales. Both of these retail centers have relatively low vacancies, and consist of local-serving stores and service providers. Heritage Park Shopping Center is the newer and larger of the two centers, with 167,329 square feet of gross leasable area and originally built in 1989. Sunset Center was built in 1981 and has a total GLA of 85,272. However, the closure of the Albertson's location at the Sunset Center has the potential to impact the other stores located in that development, and shift sales towards the Raley's-anchored Heritage Park Shopping Center or even other shopping centers outside of Suisun City.

As mentioned earlier, Suisun City has a population of around 28,000 residents, with 8,768 households. The average annual income for Suisun City households is approximately \$71,121.

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<sup>5</sup> National Research Bureau; 2006 *Shopping Center Directory*; 6-704-6-705.

### **4.3 LOCAL HOUSEHOLD SPENDING**

Based on data from ADE's retail demand model, the estimated annual retail spending by Suisun City households totals about \$220 million, as shown in Table 4-1. It should be noted that much of this spending currently leaves Suisun City because neighboring communities provide retail offerings not available locally.

Household spending among Suisun City residents is distributed across the full range of retail store categories. The three largest retail store spending categories are new car dealers, grocery stores, and department/discount stores with about \$51 million, \$36 million, and \$22 million of annual spending, respectively. Other retail store categories with more than \$10 million of annual spending by Suisun City households include gasoline service stations, eating places/restaurants, and gasoline service stations.

Household retail demand from neighboring Rio Vista totals \$75 million, while Fairfield residents add another \$858 million in household spending. Along with Suisun City residents, this creates a total retail spending potential for the combined market area of more than \$1.1 billion.

**TABLE 4-1  
REGIONAL HOUSEHOLD RETAIL SPENDING, 2006**

<b>Retail Group</b>	<b>Suisun City Household Spending</b>	<b>Rio Vista Household Spending</b>	<b>Fairfield Household Spending</b>	<b>Total Household Demand</b>
<b>Total</b>	\$220,105,053	\$74,898,145	\$857,953,940	\$1,152,957,138
<b>Apparel Store Group</b>	\$11,821,794	\$3,954,766	\$45,705,943	\$61,482,504
Women's Apparel	\$2,611,086	\$874,172	\$10,099,211	\$13,584,468
Men's Apparel	\$929,844	\$303,545	\$3,561,410	\$4,794,799
Family Clothing	\$5,867,167	\$1,961,008	\$22,693,996	\$30,522,172
Shoe Stores	\$2,413,697	\$816,041	\$9,351,327	\$12,581,065
<b>General Merchandise Group</b>	\$40,739,731	\$14,053,324	\$160,078,545	\$214,871,600
Department Stores	\$21,707,577	\$7,312,053	\$84,290,935	\$113,310,565
Other General Merchandise	\$10,945,152	\$3,798,144	\$43,107,541	\$57,850,837
Drug & Proprietary Stores	\$8,086,884	\$2,943,088	\$32,679,610	\$43,709,581
<b>Specialty Retail Group</b>	\$13,612,537	\$4,536,441	\$52,494,953	\$70,643,931
Gifts & Novelties	\$1,000,321	\$337,202	\$3,881,302	\$5,218,825
Sporting Goods	\$1,586,477	\$500,726	\$5,969,634	\$8,056,837
Florists	\$442,102	\$139,698	\$1,638,549	\$2,220,349
Photographic Equipment	\$208,822	\$65,042	\$780,279	\$1,054,144
Records & Music	\$735,249	\$241,445	\$2,816,961	\$3,793,655
Books & Stationery	\$1,218,202	\$408,236	\$4,700,335	\$6,326,773
Office Supplies/Computer Equipment	\$1,826,623	\$601,050	\$7,001,317	\$9,428,990
Office Supplies	\$873,499	\$290,843	\$3,366,347	\$4,530,689
Computer Equipment	\$953,124	\$310,208	\$3,634,970	\$4,898,301
Jewelry	\$1,093,741	\$351,212	\$4,157,389	\$5,602,342
Misc. Specialty Retail	\$5,501,000	\$1,891,830	\$21,549,187	\$28,942,016
Cosmetics/Beauty Supply	\$360,044	\$131,469	\$1,458,191	\$1,949,705
Optical Goods	\$840,695	\$285,464	\$3,279,972	\$4,406,131
Other Health/Personal Care Stores	\$672,245	\$246,515	\$2,727,279	\$3,646,039
Toys & Hobbies	\$1,427,350	\$472,872	\$5,488,475	\$7,388,697
Pet Stores	\$926,184	\$314,011	\$3,588,010	\$4,828,204
Other Misc. Specialty Stores	\$1,274,481	\$441,499	\$5,007,261	\$6,723,241
<b>Food, Eating &amp; Drinking Group</b>	\$56,374,165	\$19,849,539	\$223,692,862	\$299,916,565
Grocery Stores	\$35,508,163	\$12,728,685	\$142,147,442	\$190,384,290
Supermarkets	\$33,992,549	\$12,181,763	\$136,056,382	\$182,230,693
Convenience Stores	\$1,515,584	\$546,911	\$6,090,944	\$8,153,440
Specialty Food Stores	\$1,082,696	\$388,150	\$4,334,068	\$5,804,914
Meat & Fish Markets	\$540,775	\$194,055	\$2,165,922	\$2,900,751
Fruit & Vegetable Markets	\$210,493	\$75,362	\$841,796	\$1,127,651
Misc. Specialty Food	\$331,427	\$118,732	\$1,326,348	\$1,776,508
Liquor Stores	\$1,731,650	\$596,920	\$6,819,967	\$9,148,537
Eating Places	\$18,051,655	\$6,135,784	\$70,391,384	\$94,578,824
Full-Service Restaurants	\$8,623,956	\$2,926,278	\$33,602,534	\$45,152,767
Other Eating Places	\$8,708,093	\$2,976,292	\$34,040,945	\$45,725,329
Drinking Places	\$719,606	\$233,215	\$2,747,906	\$3,700,727
<b>Building Materials &amp; Homefurnishings Group</b>	\$21,139,360	\$6,706,915	\$79,678,787	\$107,525,063
Furniture & Home Furnishings	\$7,821,380	\$2,484,500	\$29,630,715	\$39,936,595
Furniture Stores	\$5,271,653	\$1,657,361	\$19,867,188	\$26,796,203
Other Home Furnishings Stores	\$2,549,726	\$827,139	\$9,763,527	\$13,140,392
Household Appliances & Electronics	\$3,761,602	\$1,238,963	\$14,437,721	\$19,438,286
Used Merchandise	\$522,577	\$173,060	\$2,011,763	\$2,707,401
Nurseries & Garden Supply Stores	\$2,265,726	\$714,449	\$8,382,890	\$11,363,065
Lumber & Other Building Materials	\$4,037,993	\$1,238,626	\$15,001,617	\$20,278,235
Home Centers and Hardware Stores	\$2,592,620	\$812,781	\$9,688,827	\$13,094,228
Paint & Wallpaper	\$137,462	\$44,537	\$525,254	\$707,253
<b>Automotive Group</b>	\$76,417,466	\$25,797,160	\$296,302,849	\$398,517,475
New Cars & RVs	\$50,778,503	\$16,939,009	\$195,515,719	\$263,233,230
Used Car Dealers	\$3,671,227	\$1,229,094	\$14,162,146	\$19,062,467
Gasoline Service Stations	\$19,139,081	\$6,691,657	\$75,736,668	\$101,567,406
Mobile Homes & Trailers	\$13,653	\$4,288	\$51,123	\$69,063
Auto Parts & Accessories	\$1,393,901	\$478,341	\$5,462,443	\$7,334,686
Boats & Motorcycles	\$1,421,100	\$454,772	\$5,374,751	\$7,250,623

Source: ADE, California Department of Finance, ABAG; retail demand model developed from U.S. Economic Census and Bureau of Labor Statistics Consumer Expenditure Survey

## **4.4 SUISUN CITY RETAIL SALES**

In addition to the amount that local households spend at retail stores, the other component that defines the local retail market is the retail sales generated by local stores. Sales tax data from the State Board of Equalization was used to calculate the retail store sales by store category for Suisun City. After adjusting the sales tax data to account for nontaxable item sales, the annual retail sales by businesses in Suisun City total approximately \$117 million, as shown in Table 4-2.

The largest group of retail sales is concentrated in grocery stores, restaurants, and gasoline service stations. Together, these three retail categories account for over \$91 million in annual retail sales, or nearly 78 percent of the total retail sales in Suisun City. The food stores in Suisun City generated over \$37 million in sales in 2006.<sup>6</sup> In addition, gasoline service stations accounted for \$34 million in retail sales, while eating places/restaurants generated about \$20 million in sales. Grocery stores primarily serve a local clientele, while restaurants and gasoline service stations have the potential to also serve daytime commuters and other shoppers passing through.

## **4.5 RETAIL LEAKAGE**

Retail leakage represents the mismatch between household spending by Suisun City residents and the retail sales by local retail establishments. Leakage indicates both an existing shortcoming with the degree to which existing household demand remains unmet by local retailers, as well as an opportunity because unmet retail demand can create potential for new stores as well as sales expansions for existing stores. Those store categories with net capture of regional sales extend their market reach into the surrounding region. The sales leakage trend identified in the analysis shows that Suisun City has an overall net leakage when considering all retail categories as a group, and the majority of individual retail store categories also show leakage.

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<sup>6</sup> The total grocery/liquor store sales in Suisun City includes some sales data from the former Albertson's supermarket, which closed in late-2006.

**TABLE 4-2  
SUISUN CITY RETAIL LEAKAGE ANALYSIS, 2006**

<b>Retail Group</b>	<b>Suisun City Household Spending</b>	<b>Suisun City Retail Sales</b>	<b>Sales Leakages</b>
<b>Total</b>	\$220,105,053	\$117,202,723	\$102,902,330
<b>Apparel Store Group</b>	\$11,821,794	\$847,200	\$10,974,594
Family, Men's, Women's Apparel*	\$9,408,097	\$847,200	\$8,560,897
Shoe Stores	\$2,413,697	\$0	\$2,413,697
<b>General Merchandise/Specialty Retail Group*</b>	\$54,352,269	\$11,665,924	\$42,686,344
Department Stores/Other General Merchant	\$32,652,848	\$53,674	\$32,599,173
Gifts & Novelties	\$1,000,321	\$44,478	\$955,843
Sporting Goods	\$1,586,477	\$408,509	\$1,177,968
Florists	\$442,102	\$0	\$442,102
Photographic Equipment	\$208,822	\$0	\$208,822
Records & Music	\$735,249	\$0	\$735,249
Office Supplies/Books & Stationery*	\$3,044,825	\$1,361,300	\$1,683,525
Jewelry	\$1,093,741	\$0	\$1,093,741
Misc. Specialty Retail/Drug Stores*	\$13,587,884	\$9,797,963	\$3,789,920
<b>Food, Eating and Drinking Group</b>	\$56,374,165	\$57,207,890	(\$833,725)
Food Stores/Liquor Stores*	\$38,322,510	\$37,384,001	\$938,509
Eating Places	\$18,051,655	\$19,823,889	(\$1,772,234)
<b>Building Materials And Homefurnishings Group</b>	\$21,139,360	\$10,092,943	\$11,046,416
Furniture & Home Furnishings	\$7,821,380	\$1,636,473	\$6,184,907
Household Appliances & Electronics	\$3,761,602	\$159,000	\$3,602,602
Used Merchandise	\$522,577	\$82,100	\$440,477
Garden Supply/Lumber/Paint Stores*	\$6,441,181	\$5,710,666	\$730,515
Home Centers and Hardware Stores	\$2,592,620	\$2,504,705	\$87,915
<b>Automotive Group</b>	\$76,417,466	\$37,388,766	\$39,028,700
New Cars & RVs	\$50,778,503	\$0	\$50,778,503
Used Car Dealers	\$3,671,227	\$136,800	\$3,534,427
Gasoline Service Stations	\$19,139,081	\$33,825,866	(\$14,686,785)
Mobile Homes & Trailers	\$13,653	\$0	\$13,653
Auto Parts & Accessories	\$1,393,901	\$2,496,800	(\$1,102,899)
Boats & Motorcycles	\$1,421,100	\$929,300	\$491,800

Source: ADE, California Department of Finance, ABAG; retail demand model developed from U.S. Economic Census and Bureau of Labor Statistics Consumer Expenditure Survey

Notes: Market area defined as the City of Suisun City. Does not include mail-order and other remote retail spending.

Store categories marked with asterisks ("\*") are aggregated due to confidentiality restrictions associated with reporting sales tax data.

Comparing the local household spending with the annual sales by Suisun City retailers, the analysis found that the \$220 million in total retail demand by Suisun City residents is approximately \$103 million greater than the \$117 million in total retail sales. However, the important finding is not in the overall retail leakage, but in which retail categories this leakage occurs.

In general, Suisun City has had greater success at capturing retail sales in some locally oriented categories such as grocery stores, gasoline service stations, and restaurants.

Otherwise, leakages occurred in nearly all retail categories with the largest leakages found in regional retail categories where stores have a minimal presence or do not currently operate in Suisun City.

### **STORE TYPES WITH NET CAPTURE OF RETAIL SALES**

Suisun City had a net capture of retail sales in three categories – restaurants, gasoline service stations, and auto parts. In addition, the grocery store sales in Suisun City came very close to matching the total local household demand for that retail category. For the restaurants and

gasoline service stations, those businesses draw from local demand, but also benefit from Suisun City's location along Highway 12, which draws some commuters that reside or work in neighboring communities. Auto part stores draw from both consumer and business-to-business demand, and the net capture of spending in that category likely reflects the presence of business-to-business demand.

## **STORE TYPES WITH NET LEAKAGE OF RETAIL SALES**

By far the largest retail leakage occurred in new car dealerships, where Suisun City residents generate nearly \$51 million in annual spending and all of this spending currently leaves the community. This category alone accounts for about half of the net retail leakage in Suisun City.

The community also has a large proportion of unmet consumer spending in several general merchandise, specialty retail, apparel, and building materials/home furnishings categories.

As a group, general merchandise and specialty retail stores generated a net leakage of approximately \$43 million. The largest retail leakage in this group occurred in department stores/other general merchandise stores in which nearly all of the \$33 million in household spending for this category currently leaves Suisun City. Sporting goods stores, office supplies/book stores, and miscellaneous specialty retail/drug stores each generate more than \$1 million in retail leakage. In addition, the following specialty retail categories currently generate no retail sales in Suisun City – florists, photographic equipment, music stores, and jewelry stores. Specialty retail stores in other communities have served as a targeted niche for their historic downtown areas, because they are often unique stores that benefit from a more pedestrian-oriented and small-scale shopping district.

Apparel stores as a group generate nearly \$11 million in retail spending leakage. Establishments in Suisun City generate less than \$1 million in annual sales, while the remainder leaves the community.

In the building materials and home furnishings retail group, existing sales account for approximately half of the \$21 million in household demand. The largest leakage in this category occurs in furniture and home furnishings stores, with approximately \$6 million in unmet local demand. Household appliances and electronics stores account for another \$3.6 million in retail leakage. For other categories related to home improvement and building materials, the existing retail sales came close to matching household demand. It should be noted however that these categories likely still have unmet demand because they generally have a large business-to-business customer base.

## **4.6 LINKING RETAIL LEAKAGE TO ATTRACTION POTENTIAL**

With Suisun City's relatively small population base, the community has a more limited capacity to support new retail establishments, unless the community can successfully capture new spending from outside of the community. In those categories where Suisun City has retail sales leakage, the community has potential to recapture some local household spending

that currently goes outside of the area. The potential for supporting new establishments, however, varies by category and even in those categories where Suisun City has enough unmet retail demand to support a new establishment, other market factors affect whether those types of businesses can be brought into the community.

With \$103 million of retail leakage by market area households, this amount of spending can potentially support up to 24 new retail establishments with a total of \$90 million in annual sales, assuming that this retail leakage can be recaptured. In order to support a new retail establishment, the leakage has to be large enough to support a viable business for a given retail category. The analysis established a minimum support level for each retail category by estimating the average sales by store type for retail establishments in Solano County.<sup>7</sup>

**TABLE 4-3  
SUISUN CITY RETAIL LEAKAGE ANALYSIS, 2006**

<b>Retail Group</b>	<b>Sales Leakages</b>	<b>Supportable New Stores</b>	<b>Retail Attraction Potential</b>	<b>Continuing Leakage</b>	<b>Square Footage Potential</b>
<b>Total</b>	\$102,902,330	24	\$90,085,666	\$12,802,981	229,717
<b>Apparel Store Group</b>	\$10,974,594	8	\$10,610,687	\$363,907	48,703
Family, Men's, Women's Apparel*	\$8,560,897	6	\$8,413,289	\$147,608	37,731
Shoe Stores	\$2,413,697	2	\$2,197,398	\$216,299	10,972
<b>General Merchandise/Specialty Retail Group*</b>	\$42,686,344	6	\$28,266,932	\$14,419,412	139,454
Department Stores/Other General Merch.	\$32,599,173	1	\$24,609,681	\$7,989,492	126,203
Gifts & Novelties	\$955,843	1	\$663,275	\$292,568	4,134
Sporting Goods	\$1,177,968	0	\$0	\$1,177,968	0
Florists	\$442,102	1	\$343,960	\$98,143	1,211
Photographic Equipment	\$208,822	0	\$0	\$208,822	0
Records & Music	\$735,249	0	\$0	\$735,249	0
Office Supplies/Books & Stationery*	\$1,683,525	0	\$0	\$1,683,525	0
Jewelry	\$1,093,741	1	\$817,259	\$276,483	1,589
Misc. Specialty Retail/Drug Stores*	\$3,789,920	2	\$1,832,757	\$1,957,163	6,317
<b>Food, Eating &amp; Drinking Group</b>	(\$833,725)	2	\$1,578,897	(\$2,412,652)	4,553
Food Stores/Liquor Stores*	\$938,509	2	\$1,578,897	(\$640,418)	4,553
Eating Places	(\$1,772,234)	0	\$0	(\$1,772,234)	0
<b>Building Materials &amp; Homefurnishings Group</b>	\$11,046,416	6	\$9,615,541	\$1,430,875	37,007
Furniture & Home Furnishings	\$6,184,907	4	\$5,360,959	\$823,948	22,270
Household Appliances & Electronics	\$3,602,602	1	\$3,058,645	\$543,956	8,416
Used Merchandise	\$440,477	0	\$0	\$440,477	0
Garden Supply/Lumber/Paint Stores*	\$730,515	1	\$1,195,937	(\$465,422)	6,321
Home Centers and Hardware Stores	\$87,915	0	\$0	\$87,915	0
<b>Automotive Group</b>	\$39,028,700	2	\$40,013,609	(\$998,562)	0
New Cars & RVs	\$50,778,503	1	\$36,603,266	\$14,175,237	n/a
Used Car Dealers	\$3,534,427	1	\$3,410,343	\$124,085	n/a
Gasoline Service Stations	(\$14,686,785)	0	\$0	(\$14,686,785)	0
Mobile Homes & Trailers	\$13,653	0	n/a	n/a	n/a
Auto Parts & Accessories	(\$1,102,899)	0	\$0	(\$1,102,899)	0
Boats & Motorcycles	\$491,800	0	\$0	\$491,800	0

Source: ADE, California Department of Finance, ABAG; retail demand model developed from U.S. Economic Census and Bureau of Labor Statistics Consumer Expenditure Survey

Notes: Market area defined as the City of Suisun City. Does not include mail-order and other remote retail spending.

Store categories marked with asterisks ("\*") are aggregated due to confidentiality restrictions associated with reporting sales tax data.

<sup>7</sup> Average sales per establishment benchmarks come from the 2002 Economic Census data for Solano County.

The store categories with retail leakage large enough to support potential new retail stores are as follows:

- Family, men's, women's clothing (six establishments)
- Shoe stores (two establishments)
- Department stores/other general merchandise (one establishment)
- Gifts and novelties (one establishment)
- Florist (one establishment)
- Jewelry (one establishment)
- Misc. specialty retail/drug stores (two establishments)
- Food/liquor stores (two establishments)
- Furniture and home furnishings (four establishments)
- Household appliances and electronics (one establishment)
- Garden supply/lumber/paint stores (one establishment)
- New car dealer (one establishment)
- Used car dealer (one establishment)

Using national averages, these 24 establishments (except for the auto dealerships) potentially generates a demand for nearly 230,000 square feet of retail space. This amount of retail square footage does not necessarily mean that new retail developments are feasible in the short-term because some of this demand could presumably be accommodated within existing vacant commercial spaces.

The number of supportable retail establishments could conceivably be greater, and encompass retail categories where the retail leakage does not currently support an average retail establishment. This is because retail stores in Suisun City do not necessarily have to attract sales approaching the countywide average in order to operate as viable businesses. These stores could operate in smaller-than-average spaces or operate profitably on lower sales per square foot, depending on the location and operating characteristics. This would potentially include specialty retail stores such as sporting goods, music, and office supplies/stationery. Each of these categories has over \$735,000 in unmet retail demand, which can potentially support retail spaces of over 3,600 square feet.<sup>8</sup>

However, having a sufficient amount of unmet household spending demand to support this mix of new retail stores does not mean that these stores represent short-term business attraction opportunities for Suisun City. This is due to the presence of strong regional

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<sup>8</sup> This assumes a benchmark sales of \$200 per square foot.



competition in nearby communities, and other site location criteria for certain types of retail stores.

### **APPAREL STORE GROUP**

The apparel store group shows a total attraction potential for eight establishments and over \$10 million in recaptured retail sales. A market impediment to attracting new stores of this type to Suisun City is that most apparel stores locate in regionally positioned retail centers, whereas Suisun City's existing retail centers primarily serve the local market. In addition, there already exists a large concentration of apparel stores in Fairfield, particularly at the Westfield shopping center. Apparel stores that locate in Suisun City would need to successfully compete with those stores. Some apparel stores are oriented towards local-serving community level retail centers, but those types of stores alone are unlikely to recapture all of the apparel store demand in Suisun City.

### **GENERAL MERCHANDISE/SPECIALTY RETAIL GROUP**

The retail attraction potential shows that Suisun City currently has sufficient unmet demand to support one department store/other general merchandise establishment. Currently, the local offerings in this store category are limited, and local households create about \$33 million in unmet spending demand. The \$25 million in attraction potential for department store or other general merchandise store is based on the average sales per store in Solano County for this category. Based on national benchmark sales per square foot data in this category, this attraction potential can support approximately 126,200 square feet of floor area.<sup>9</sup> This accounts for more than half of the total square footage that the retail attraction potential will support.

It should be noted though that this category encompasses the total demand for both traditional department stores and discount stores. Discount stores such as Target or Wal-Mart have located in communities comparable to Suisun City, and will locate in standalone locations or as anchor stores for a community level retail center. However, traditional department stores such as Sears or Nordstrom typically locate only in regional shopping centers that aggregate multiple department stores together.

The specialty retail categories show approximately five new stores that can be supported by existing unmet spending demand. As with other retail categories, these types of stores already exist in neighboring communities. However, specialty retail stores can locate in a wide variety of areas, and the potential store types supportable in Suisun City are not limited to regional shopping center settings.

### **FOOD, EATING, AND DRINKING GROUP**

The attraction potential in this category is limited to two food or liquor store establishments, with a sales support of \$1.6 million. This is well below the typical sales level for a large-scale

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<sup>9</sup> Benchmark data from Urban Land Institute. The sales per square foot reported for specific store chains such as Target and Wal-Mart through public financial filings is generally higher, which reduces the floor area that the local market alone can support.

supermarket, and indicates that the short-term attraction potential for Suisun City in this category consists of small-scale food stores with a total square footage potential of about 4,500 square feet. Food stores of this size are typically limited to convenience retail centers, and do not serve market areas beyond the surrounding neighborhood.

## **BUILDING MATERIALS AND HOME FURNISHINGS GROUP**

Within this retail group, the primary attraction potential is with furniture and home furnishings stores, in which unmet spending demand can support four new establishments with \$5.3 million in retail sales and estimated support for over 22,200 square feet. Furniture and home furnishings stores can vary considerably in their space and locational requirements. In some communities, home furnishings stores are aggregated together into dedicated retail centers that combine multiple home improvement establishments. In other areas, multiple furniture stores are concentrated together into downtown areas, and might include a mix of new furniture and antique stores.

The household appliance and electronics category shows attraction potential for one establishment, with \$3.1 million in sales and 8,400 square feet. This attraction potential accounts for the wide variation in store sales within this category. Household appliance and electronics retailers can range from locations as small as an electronics repair establishment or Radio Shack location, and as large as a Best Buy or Fry's Electronics location.

## **AUTOMOTIVE GROUP**

The attraction potential in the automotive group demonstrates that the buying power of Suisun City residents is large enough to support a new car dealership. This category alone accounts for \$51 million in sales leakages and approximately \$37 million in attraction potential (which represents the average sales for a single auto dealership in Solano County). However, the likelihood of a single automobile dealership locating in Suisun City is relatively low. This is because automobile dealerships will typically aggregate into auto malls that encompass multiple dealerships and multiple auto makes. A large auto mall already exists along Highway 12 in Fairfield. The only potential opportunity for Suisun City would be if any makes not currently represented in Fairfield want to locate in the market area, and land can be set aside for those makes.

## **4.7 EXISTING RETAIL SITES**

In a previous study, ADE identified 269 total acres of land in Suisun City that could be used for economic development projects. Of this acreage, 117 acres were identified as suitable for retail development. Using a sales assumption of \$200 per square foot, this acreage has a total sales potential of \$255 million. Compared to the existing retail leakage of \$103 million, this means that Suisun City already has enough potential retail site acreage to recapture all of the existing unmet spending demand.

Any retail attraction beyond the unmet demand would require Suisun City to transform from a primarily local-serving retail role to a regional retail provider that attracts significant retail spending from surrounding communities. Suisun City will not likely attract the total sales

potential of \$255 million because of the strong regional retail centers already located in Fairfield and Vacaville.

## **4.8 SUPPORT THRESHOLDS FOR NEW RETAIL BASED ON HOUSEHOLD GROWTH**

Retail demand is primarily driven by population growth. As new households come into a community, their added spending power creates potential for new retail establishments. Based on the household spending patterns for current households in Suisun City, Table 4-4 shows the average spending per household, and the number of household required to support an average establishment. This table shows where the “equilibrium” between supply and demand occurs in Suisun City for different retail store types. As implied by the retail leakage analysis, the thresholds required to support new retail establishments will vary significantly because retail store types have different typical sales levels per store, and household demand varies.

For transit-oriented development in particular, this is an important consideration because there has been a tendency with TOD mixed-use projects to overbuild the ground-level commercial component.<sup>10</sup>

In general, most store types require at least 5,000 households to support a new retail establishment. Store types with these thresholds typically locate in larger community-level or regional retail centers. Store types with the lowest support thresholds are typically in retail categories that consumers frequent on a regular basis such as food stores, restaurants, and gasoline service stations. The store types with support thresholds of under 3,000 households are listed below.

- Women’s apparel
- Miscellaneous specialty retail
- Supermarkets
- Convenience stores
- Eating places
- Furniture and home furnishings
- Gasoline service stations

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<sup>10</sup> Cervero, et al; pp.107-109.

**TABLE 4-4  
SUISUN CITY HOUSEHOLD SUPPORT LEVELS FOR NEW RETAIL STORES**

Retail Group	Suisun City Spending Per Household	Average Sales Per Store (Solano County)	Households Needed to Support New Store
<b>Apparel Store Group</b>			
Women's Apparel	\$298	\$846,843	2,844
Men's Apparel	\$106	\$846,843	7,985
Family Clothing	\$669	\$2,512,959	3,755
Shoe Stores	\$275	\$1,098,699	3,991
<b>General Merchandise Group</b>			
Department Stores/Other General Merchant	\$3,724	\$24,609,681	6,608
Drug & Proprietary Stores	\$922	\$5,899,097	6,396
<b>Specialty Retail Group</b>			
Gifts & Novelties	\$114	\$663,275	5,814
Sporting Goods	\$181	\$2,390,157	13,210
Florists	\$50	\$343,960	6,822
Photographic Equipment	\$24	\$1,191,283	50,019
Records & Music	\$84	\$973,052	11,604
Books & Stationery	\$139	\$1,470,782	10,586
Office Supplies/Computer Equipment	\$208	\$3,629,444	17,422
Jewelry	\$125	\$817,259	6,552
Misc. Specialty Retail	\$627	\$916,379	1,461
<b>Food, Eating &amp; Drinking Group</b>			
Grocery Stores	\$4,050	\$9,792,017	2,418
Specialty Food Stores	\$123	\$701,980	5,685
Liquor Stores	\$197	\$876,917	4,440
Eating Places	\$2,059	\$688,376	334
<b>Building Materials &amp; Homefurnishings Group</b>			
Furniture & Home Furnishings	\$892	\$1,340,240	1,502
Household Appliances & Electronics	\$429	\$3,058,645	7,129
Used Merchandise	\$60	\$484,817	8,134
Nurseries & Garden Supply Stores	\$258	\$1,195,937	4,628
Lumber & Other Building Materials	\$461	\$2,626,216	5,703
Home Centers and Hardware Stores	\$296	\$8,844,935	29,913
Paint & Wallpaper	\$16	\$110,590	7,054
<b>Automotive Group</b>			
New Cars & RVs	\$5,791	\$36,603,266	6,320
Used Car Dealers	\$419	\$3,410,343	8,145
Gasoline Service Stations	\$2,183	\$3,051,510	1,398
Auto Parts & Accessories	\$159	\$1,286,390	8,092
Boats & Motorcycles	\$162	\$3,554,382	21,930

Source: ADE, data from U.S. Economic Census and California Department of Finance; retail demand model developed from U.S. Economic Census and Bureau of Labor Statistics Consumer Expenditure Survey

## 4.9 VISITOR MARKET

Solano County as a whole has a total economic impact due to tourism of \$531 million annually.<sup>11</sup> Approximately \$257 million of this visitor spending goes towards retail services, excluding transportation costs (including gasoline).

The train station in downtown Suisun City provides a clear point of entry and a focus of recurring activity. Although trains have served as significant draws for tourism the much

<sup>11</sup> Dean Runyan Associates; California Travel Impacts by County, 1992-2005, p.80.

higher average weekday ridership is an indicator that Suisun City's train station is used primarily for work commutes, rather than tourism.

Annual ridership on the Capitol Corridor totals approximately 124,700 trip-ends (combined inbound and outbound, see tables 4-5 and 4-6) in Suisun, with a total daily average ridership of about 171 round-trips passing through the Suisun train depot. Average daily weekday ridership totals about 217 round-trips, with an average weekend ridership of 55 daily round-trips.

The most popular destination/originating station for Suisun along the Capitol Corridor is Sacramento, with over 32,000 annual trip-ends. Other frequent travel destination/originating stations with more than 10,000 annual trip-ends through Suisun include Emeryville, Martinez, Oakland-Jack London, and Richmond.

**TABLE 4-5  
YEARLY CAPITOL CORRIDOR RIDERSHIP, ORIGINATING FROM SUISUN STATION**

	Oct 06	Nov 06	Dec 06	Jan 07	Feb 07	Mar 07	Apr 07	May 07	Jun 07	Jul 07	Aug 07	Sep 07	Total
Auburn	3	3	7	2	20	13	2	5	30	3	1	19	108
Berkeley	317	278	266	273	198	327	314	439	289	300	305	283	3,589
Davis	439	394	186	302	290	416	408	421	418	435	463	375	4,547
Emeryville	883	853	694	841	640	884	860	997	886	995	954	887	10,374
Fremont/Centerville	128	98	31	78	32	41	42	52	47	50	48	72	719
Santa Clara/Great America	38	123	77	115	126	94	93	52	153	54	77	78	1,080
Hayward	13	11	14	11	21	16	23	14	24	22	21	17	207
Martinez	657	518	604	654	514	663	646	791	569	570	662	551	7,399
Oakland Coliseum	38	29	51	21	15	23	23	40	38	25	37	31	371
Oakland - Jack London	755	712	797	810	632	771	823	934	884	749	941	762	9,570
Richmond	470	410	472	489	477	476	400	478	592	444	474	454	5,636
Rocklin	4	5	2	2	5	4	1	2	4	3	5	0	37
Roseville	72	82	48	73	82	67	92	135	151	91	118	119	1,130
Sacramento	1,445	1,198	1,089	1,024	966	1,330	1,493	1,583	1,678	1,351	1,240	1,258	15,655
San Jose Diridon	86	96	94	88	105	87	115	99	108	106	115	113	1,212
<b>Total</b>	<b>5,348</b>	<b>4,810</b>	<b>4,432</b>	<b>4,783</b>	<b>4,123</b>	<b>5,212</b>	<b>5,335</b>	<b>6,042</b>	<b>5,871</b>	<b>5,198</b>	<b>5,461</b>	<b>5,019</b>	<b>61,634</b>

Source: ADE, Inc., The Capitol Corridor Joint Powers Authority (CCJPA)

**TABLE 4-6  
YEARLY CAPITOL CORRIDOR RIDERSHIP, DESTINATION SUISUN STATION**

	Oct 06	Nov 06	Dec 06	Jan 06	Feb 06	Mar 06	Apr 06	May 06	Jun 06	Jul 06	Aug 06	Sep 06	Total
Auburn	6	8	2	3	22	12	2	6	27	3	2	20	113
Berkeley	437	398	369	275	308	414	396	448	400	376	423	381	4,625
Davis	348	317	244	282	234	357	331	382	307	394	384	328	3,908
Emeryville	825	766	691	802	611	780	813	1,095	806	970	885	832	9,876
Fremont/Centerville	129	84	32	62	37	60	56	58	39	44	57	54	712
Santa Clara/Great America	37	115	61	93	89	90	69	48	144	53	71	80	950
Hayward	23	9	9	14	20	11	10	23	17	30	29	15	210
Martinez	682	568	655	663	524	677	641	777	600	676	723	594	7,780
Oakland Coliseum	43	31	54	20	12	13	21	52	29	55	32	43	405
Oakland - Jack London	726	709	775	714	604	738	756	767	737	730	792	685	8,733
Richmond	548	551	515	533	512	537	546	532	591	548	567	502	6,482
Rocklin	0	0	4	0	0	0	0	1	0	1	2	1	9
Roseville	72	81	46	74	81	64	92	132	154	87	121	122	1,126
Sacramento	1,434	1,372	1,266	1,183	1,209	1,501	1,543	1,553	1,566	1,449	1,414	1,255	16,745
San Jose Diridon	129	122	116	118	118	113	121	122	117	121	137	115	1,449
<b>Total</b>	<b>5,439</b>	<b>5,131</b>	<b>4,839</b>	<b>4,836</b>	<b>4,381</b>	<b>5,367</b>	<b>5,397</b>	<b>5,996</b>	<b>5,534</b>	<b>5,537</b>	<b>5,639</b>	<b>5,027</b>	<b>63,123</b>

Source: ADE, Inc., The Capitol Corridor Joint Powers Authority (CCJPA)

## 4.10 IMPLICATIONS FOR OLD TOWN SUISUN

Currently, Old Town Suisun accounts for approximately four percent of the total taxable sales in Suisun City. The downtown district together accounted for \$3.4 million in total taxable transactions.<sup>12</sup>

**TABLE 4-7  
DOWNTOWN SUISUN SHARE OF OVERALL TAXABLE SALES, 2006**

	Q1 2006	Q2 2006	Q3 2006	Q4 2006	Annual Total
Old Town Suisun	\$813,300	\$894,200	\$848,900	\$921,500	\$3,477,900
Total Citywide Taxable Sales	\$19,206,700	\$24,813,700	\$23,486,200	\$20,858,600	\$88,365,200
Percent of Total	4.2%	3.6%	3.6%	4.4%	3.9%

Source: ADE, data from Hinderliter, deLlamas Associates

Note: Data does not account for sales of non-taxable items such as groceries and prescription drugs.

Some of the attraction categories identified in the retail analysis present potential opportunities for the Old Town. Historic downtowns are attractive locations for food stores, clothing stores, specialty retail stores, and many types of home improvement and home furnishings stores. This fits with many of the retail categories that are currently in short supply in Suisun City. However, with many existing retail vacancies in Marina Center and Sunset Center, and over 100 acres of potential retail sites throughout Suisun City, there is a lot of competition already within the community for any new retail development.

<sup>12</sup> The sales tax audit report did not include data on individual stores for Old Town Suisun, therefore the analysis only accounts for taxable transaction and does not estimate the nontaxable retail sales.

The historic business district has an advantage in its pedestrian orientation, and mix of activity. The presence of the train station provides a recurring focal point of activity, but the existing ridership levels do not indicate any significant economic impact on downtown businesses. Any growth in support for existing downtown businesses, as well as attracting future tenants to the Old Town district will depend on growth in three key constituent groups – local residents, daytime workers, and visitors.

## **DOWNTOWN CONSTITUENT RETAIL DEMAND**

The retail leakage analysis identified the citywide retail attraction potential. This would provide some key opportunities for downtown Suisun, if that area becomes the focus for the City's retail attraction efforts. However, if new retail businesses fill existing vacancies outside the downtown area, or are used to populate new retail developments, then the potential benefit to downtown Suisun City is diminished.

A more sustainable and market-driven approach would be to tie new retail space to downtown housing and office development. Attracting new residents and workers into Old Town would create an internally driven market for local-serving retail and buttress demand for any retail businesses that would need to attract customers from throughout the City and perhaps neighboring communities.

Daytime workers constitute another consumer group that could support retail businesses in the downtown area on an ongoing basis. Typically, daytime workers will run food errands during the day, and occasionally shop for other recurring items.

Visitors support the Solano County economy to the tune of over \$500 million annually. Suisun's train ridership patterns indicate that the downtown area has not yet emerged as a destination, however Suisun City's location along Highway 12 is close to major tourism draws in Fairfield with the Jelly Belly factory and Budweiser brewery. With pending highway expansion and a planned offramp realignment onto Sacramento Street, the access and visibility of Suisun City's downtown area will be greatly enhanced.

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## 5. TRANSIT ORIENTED DEVELOPMENT SCENARIOS

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Based on the market analysis, and a study of the development patterns adjacent to the downtown train station, ADE developed six scenarios. Three of these scenarios present potential alternatives for the downtown study area, while the other three scenarios look at potential alternatives for other sites in the adjacent areas. These scenarios each address different market opportunities, and present slightly different ways for downtown Suisun City to move towards a transit-oriented pattern.

### 5.1 EXISTING CONDITIONS

#### DOWNTOWN STUDY AREA

The downtown study area for developing TOD scenarios generally encompasses the area bordered by Main Street to the east, Sacramento Street to the south, and Highway 12 to the north. The scenarios also include the CalTrans Park & Ride parking lot across Main Street from the train station.

The combined land area for the downtown parcels totals 16.8 acres. The largest portion of this existing acreage is currently used for light industrial uses with more than five acres. These light industrial parcels are primarily located along the railroad right-of-way and parcels immediately adjacent. They are primarily used for auto parts/repair, utilities, and as offices for construction/contracting businesses.

Existing commercial uses comprise approximately 3.6 acres. These uses are primarily located along Main Street, and include retail, service commercial, and food service businesses. Another 3.5 acres are currently used exclusively for parking. Other sites include on-site parking, but are anchored by other uses. The remaining acreage consists of vacant land.

This study area does not include the single-family residential lots located along and adjacent to Sacramento Street. The study area includes the vacant parcel adjoining the One Harbor Center property. The adjacent vacant parcels east of the existing parking lot are analyzed separately.

**TABLE 5-1**  
**SUMMARY OF EXISTING DOWNTOWN LAND USES**

	Existing Uses
Commercial	3.24
Govt.	0.17
Industrial	4.79
Industrial/Commercial	0.39
Parking	3.52
Office	3.05
Vacant	1.62
Total	16.78

Source: ADE, Inc.; data from Parcelquest and field verification.

## OTHER STUDY AREA SITES

Additional development scenarios looks at a 31.8-acre vacant parcel north of Highway 12 known as the Hoffman site, a 5.3-acre site south of Lotz Way along Civic Center Boulevard, and the previously studied Denverton Curve site (2.7 acres) located directly south of the Hoffman site.

FIGURE 1  
STUDY AREA MAP



Source: ADE, Inc., aerial base map from Google Earth.

## 5.2 OVERALL ASSUMPTIONS

In general, jurisdictions enacting TOD plans have generally specified residential densities between approximately 8 dwelling units (DUs) per acre and more than 25 DUs per acre.

Communities typically specify lower densities for TODs located along bus corridors, while the higher densities go with light rail and heavy rail.<sup>13</sup> In addition, the typical Floor Area Ratio (FAR) for non-residential TODs range from 0.5 to 1.0, with substantially higher densities possible when using structured parking or developing in more urban settings.

For this study, the scenarios assumed high densities for new development and parcels with changes to the existing land uses. The analysis used these higher density assumptions to illustrate the square footage and housing units possible under specific land use scenarios. In addition, these higher densities will create greater potential for transit usage.

For residential uses, the analysis used an average density assumption of 25 or 40 DU per acre. Office uses assume a FAR of 0.25 to 1.0, while entertainment uses assume a FAR of 0.4 and R&D/flex spaces assume a FAR of 0.5. Mixed use buildings that incorporate commercial uses below with residential above, assume a FAR of 0.5 for the commercial component, and a threshold of one dwelling unit per 1,000 square feet of commercial space.

### 5.3 IN-FILL DEVELOPMENT SCENARIO

This scenario primarily looks at infilling existing vacant parcels and underutilized spaces within the Downtown Study Area. The in-fill scenario does not propose large-scale changes to the existing land uses, except for two underutilized parcels and two other parcels currently used for parking. The scenario assumes that market conditions will allow for higher densities to develop within existing vacant and underutilized spaces. It also assumes that existing industrial uses located along the rail right-of-way will remain in place for the foreseeable future. Table 5-2 summarizes the distribution of acreage and new development square footage for this scenario.

**TABLE 5-2  
SUMMARY OF IN-FILL SCENARIO LAND USES**

<b>Proposed Uses</b>	<b>Acreage</b>	<b>Commercial Square Footage</b>	<b>Office Square Footage</b>	<b>R&amp;D Flex Square Footage</b>	<b>Housing Units</b>
<b>Continuing Uses</b>					
Commercial	2.82				
Parking	0.21				
Govt.	0.17				
Office	3.05				
Industrial	3.51				
<b>Converted Uses</b>					
Commercial	0.19	4,138	0	0	0
Mixed Use	0.86	20,790	0	0	19
Office	3.31	0	144,184	0	0
Residential	2.27	0	0	0	57
Right of Way	0.39	0	0	0	0
<b>Total</b>	<b>16.78</b>	<b>24,928</b>	<b>144,184</b>	<b>0</b>	<b>76</b>

Source: ADE, Inc.; data from Parcelquest and field verification.

<sup>13</sup> Certero, et al; pp. 62-70.

## **DESCRIPTION OF POTENTIAL PROJECTS**

A total of eight potential project sites were identified for the in-fill development scenario. This encompasses a total of 7.0 acres of new and/or converted land uses. The locations for these sites are shown in Figure 2.

### **Office Site (CalTrans Park & Ride lot at Main Street and Lotz Way)**

The scenario proposes converting the CalTrans Park & Ride lot (across Main Street from the train station) into office uses. Due to the site's proximity to the train station and CalTrans owning and operating the site, this site most closely fits within the typical TOD framework. Many TOD projects involve some form of joint development arrangement with a public transportation agency, and this site would likely require a similar arrangement.

Using a high density assumption with a FAR of 1.0, the square footage potential on this site totals over 144,000 square feet. Because of the high amount of commercial square footage already under construction elsewhere in the downtown area, and the presence of existing and potential commercial and mixed-use development sites within walking distance of this site, the office site does not include any new commercial development.

With 144,000 square feet of office space, an office tower can be developed at four to five stories, with the remaining land area providing sufficient parking space for office workers. A building or cluster of buildings at that square footage with fewer than four stories would need to also develop either an underground garage or above-ground parking structure. While it can be assumed that some of employees working inside the building would take advantage of the building's proximity to both rail and bus transit, the routing and frequency of service will likely still necessitate that most of the workers at this site would drive automobiles to work.

In order to create a focal point of activity that creates a pedestrian flow with the train station and the rest of the downtown business district, the office site should be developed with a primary entrance fronting along Main Street.

### **Commercial Site (One Harbor Center parking lot)**

This vacant 0.19 acre site is currently owned by the Suisun City Redevelopment Agency and located within the parking lot for the One Harbor Center office building. Because the uses immediately surrounding the site consist entirely of surface parking, this is not an appropriate site for mixed use development. The uses proposed for this site entail commercial uses with a FAR of 0.5, which would yield over 4,100 square feet of business space or the rough equivalent of two small retail stores. Because it is not known whether the building management at One Harbor Center will allow for shared parking arrangements, this site will need to incorporate surface parking.

In order to encourage pedestrian activity, the commercial site should be developed with the primary entrance abutting the sidewalk and facing the existing Park & Ride lot/future office site. If a multilevel office building can be developed across the street, then that creates

additional market support for the uses developed at the One Harbor Center commercial site.

**FIGURE 2  
IN-FILL DEVELOPMENT SCENARIO SITE PLAN**



Source: ADE, Inc., aerial base map from Google Earth.

### Mixed Use Sites (Main Street)

Four vacant sites along Main Street were identified as potential locations for mixed use development. Together, these sites total approximately 0.86 acres with a development potential of 20,800 square feet of ground level commercial uses and 19 housing units. The existing streetscape along Main Street emphasizes building footprints that front directly onto the sidewalk. Any new mixed use development should continue that urban form, and create a more contiguous frontage that connects downtown with the waterfront.

Mixed Use Site 1 totals 0.19 acres. A development has been discussed for this site with approximately 4,700 square feet of commercial space, and second story residential units.<sup>14</sup>

<sup>14</sup> For purposes of this analysis, an assumption of four housing units was used.

Mixed Use Site 2 encompasses 0.26 acres, and is located directly adjacent to Site 3. The Suisun City Redevelopment Agency owns this lot, and has cleared the space. A mixed use development on this site would potentially add over 5,600 square feet of commercial space on the ground level with about five residential units above.

Mixed Use Site 3 is the Solis Plaza project, which has been submitted to the City as development proposal. The site area totals approximately 0.16 acres and is currently vacant, with the buildings that formerly occupied the site demolished and cleared out. The proposed project is a mixed use project that will include 5,200 square feet of restaurant space on the ground level with five residential units above.

Mixed Use Site 4 is a 0.24 acre vacant site on a corner lot at Sacramento and Main streets. A mixed use development on this site would potentially result in approximately 5,200 square feet of new commercial space with five housing units.

### **Residential Sites (Travis Court)**

Three sites adjacent to Travis Court were identified as potential locations for residential development. Residential sites 1 and 2 are currently occupied by light industrial buildings, while Site 3 is currently a vacant lot.

Unlike most of the existing industrial buildings located parallel to the rail right-of-way along Benton Court, the existing buildings on sites 1 and 2 have multiple vacancies and appear to be underutilized overall. These sites cover a total of about 1.3 acres. Conversion of these sites into residential uses would potentially result in approximately 32 housing units.

Residential Site 3 is approximately 1.0 acres, and would potentially result in about 25 housing units.

Because these three sites are in direct proximity to one another, many urban design options are available to create attractive public spaces, plazas, and streetscape treatments that visually unify the area. In addition, aggregating the three sites together can create even more possibilities for site configuration and public spaces, particularly if a portion of Travis Court is converted into a pedestrian plaza.

### **Right of Way (Benton Court and Spring Street)**

Benton Court has a dead end on the north side, which blocks vehicular and pedestrian access to the train station and other uses located along Spring Street. The land parcel that creates the dead end is currently occupied by a vacant industrial building and a strip commercial building.

In order to better connect the downtown interior with the train station, some form of pedestrian right-of-way access should be created. This assumes that Benton Court will remain the primary north-south corridor connecting the interior of the downtown district.

This right-of-way could entail an easement through the site, or clearing out the site altogether in order to extend the street right-of-way and connect to Railroad Avenue. These

sites adjacent to the trail station are not included in any potential development scenarios because some additional land dedication might be required to accommodate an extended street right-of-way, as well as a potential terminus for a future frontage road that parallels the rail right-of-way.

### Future Sacramento Street Realignment

The City’s transportation plan identifies a future connector to Highway 12 that terminates at Sacramento Street. This would open up Sacramento Street as an access road to Highway 12. A route alignment that runs parallel to the rail right-of-way, as shown in Figure 3, would require using land areas currently owned by the BNSF railroad. An alternative alignment would use the existing Benton Court street alignment and extend the street so that it connects with Sacramento Street.

## 5.4 RESIDENTIAL CONVERSION SCENARIO

This scenario presents more intensified residential development within the Downtown Study Area by expanding on the in-fill development scenario and assuming further conversion of existing light industrial uses into residential development. In addition, this scenario increases the housing density on most of the new residential parcels to 40 DU per acre. Table 5-3 summarizes the distribution of acreage and new development square footage for this scenario.

**TABLE 5-3  
SUMMARY OF RESIDENTIAL CONVERSION SCENARIO LAND USES**

Proposed Uses	Acreage	Commercial Square Footage	Office Square Footage	R&D Flex Square Footage	Housing Units
<b>Continuing Uses</b>					
Commercial	2.82				
Parking	0.21				
Office	3.05				
Industrial	0.4				
Govt.	0.17				
<b>Converted Uses</b>					
Commercial	0.19	4,138	0	0	0.0
Mixed Use	3.97	20,790	33,868	0	153
Office	3.31	0	144,184	0	0
Residential	2.27	0	0	0	91
Right of Way	0.39	0	0	0	0
<b>Total</b>	<b>16.78</b>	<b>24,928</b>	<b>178,052</b>	<b>0</b>	<b>244</b>

Source: ADE, Inc.; data from Parcelquest and field verification.

### DESCRIPTION OF POTENTIAL PROJECTS

A total of 10 potential project sites were identified for the residential conversion scenario. This encompasses a total of 10.5 acres of new and/or converted land uses. The assumptions for the street right-of-way realignments remain the same as the in-fill scenario. The locations for these sites are shown in Figure 3.

## **Residential Uses**

This scenario assumes that the residential sites 1, 2, and 3 would increase the density to 40 DU per acre. Altogether, this acreage can potentially create 91 potential units on sites 1, 2, and 3. By focusing residential activity towards Benton Court and Travis Court, this development pattern can create more of a village setting that directs activity towards Main Street, and adds to the pedestrian vitality of the waterfront.

## **Office Uses**

The office projects in the residential conversion scenario would use the same assumptions as the in-fill development scenario.

## **Mixed Use Development**

The mixed use development projects in the residential conversion scenario would use the same assumptions as the in-fill development scenario.

## **Additional Residential/Office Frontage Development**

The mixed use totals on Table 5-3 also include the conversion of an additional 3.1 acres of existing industrial uses along Benton Court into primarily residential uses. The scenario assumes that a frontage road along the railroad right-of-way will eventually connect Sacramento Avenue to Railroad Avenue. This frontage road creates additional access to those land parcels, enabling a wide range of uses.

Because of potential noise intrusions into any residential development that fronts onto the railroad, other uses should be included as a buffer for the residential uses. The scenario assumes that these uses will be offices, developed at approximately a .25 FAR, along with housing occupying an average density of 40 DU per acre. Together, these combine to create potential for 124 housing units and nearly 34,000 square feet of office space. Depending on market conditions, other uses could also potentially occupy the frontage road spaces.



**FIGURE 3  
RESIDENTIAL CONVERSION SCENARIO SITE PLAN**



Source: ADE, Inc., aerial base map from Google Earth.

## 5.5 R&D/FLEX SPACE CONVERSION SCENARIO

This scenario assumes that the existing light industrial uses parallel to the rail right-of-way will be converted into higher density R&D/flex spaces. This would take advantage of the new street right-of-way proposed to run along the western boundary of the downtown district, and connect Sacramento Street with Highway 12 using a new off-ramp. These types of uses would include light manufacturing, environmental/professional services, information technology, and administrative support functions. Using a 0.5 FAR, the addition of R&D/flex spaces will likely create a pattern of multi-level buildings and a higher density than the existing industrial spaces. Table 5-4 summarizes the distribution of acreage and new development square footage for this scenario.

**TABLE 5-4  
SUMMARY OF R&D/FLEX SPACE CONVERSION LAND USES**

<b>Proposed Uses</b>	<b>Acreage</b>	<b>Commercial Square Footage</b>	<b>Office Square Footage</b>	<b>R&amp;D Flex Square Footage</b>	<b>Housing Units</b>
<b>Continuing Uses</b>					
Commercial	2.82				
Parking	0.21				
Govt.	0.17				
Office	3.05				
Industrial	0.4				
<b>Converted Uses</b>					
Commercial	0.19	4,138	0	0	0.0
Mixed Use	0.86	20,790	0	0	19
Office	3.31	0	144,184	0	0
R&D/Flex	3.11	0	0	67,736	0
Residential	2.27	0	0	0	57
Right of Way	0.39	0	0	0	0
<b>Total</b>	<b>16.78</b>	<b>24,928</b>	<b>144,184</b>	<b>67,736</b>	<b>76</b>

Source: ADE, Inc.; data from Parcelquest and field verification.

### DESCRIPTION OF POTENTIAL PROJECTS

A total of 10 potential project sites were identified for the R&D/flex space conversion scenario. The assumptions for the street right-of-way realignments remain the same as the in-fill scenario. The locations for these sites are shown in Figure 4.

#### Office Uses

The office projects in the R&D/flex space scenario would use the same assumptions as the in-fill development scenario.

#### Mixed Use Development

The mixed use development projects in the R&D/flex space scenario would use the same assumptions as the in-fill development scenario.

## R&D/Flex Space

Conversion of 3.1 acres of existing light industrial uses into higher density R&D/flex spaces would result in 67,000 square feet of new business space. These types of uses would be more compatible with a new frontage road and connectivity to Highway 12, while creating a density and proximity to bus and rail transit that would also work for mass transit usage.

**FIGURE 4**  
**R&D/FLEX SPACE CONVERSION SCENARIO**



Source: ADE, Inc., aerial base map from Google Earth

## 5.6 HOFFMAN SITE DEVELOPMENT SCENARIO

The Hoffman site encompasses 31.6 acres of vacant property. This site was analyzed separately from the others because it does not have any current uses, and is a single contiguous site for potential future development.

At TOD densities, the Hoffman site could support a greater square footage of new uses, primarily because the vacant acreage is greater than the potentially converted acreage from any of the three downtown development scenarios. A potential development for the site would encompass a combination of housing, retail, and service/commercial uses. The potential land use summary for the Hoffman site shown in Table 5-5 allocates more than half of the site acreage to housing uses. Densities for this scenario uses similar TOD densities as the other downtown scenarios (25 DU per acre for housing uses, and 0.5 FAR for the other uses)

**TABLE 5-5  
SUMMARY OF HOFFMAN SITE DEVELOPMENT SCENARIO LAND USES**

<b>Proposed Uses</b>	<b>Acreage</b>	<b>Retail Square Footage</b>	<b>Service/ Commercial Square Footage</b>	<b>Housing Units</b>
Service/Commercial	5.9	0	128,502	0.0
Retail	2.8	60,984	0	0
Residential	16.8	0	0	420
Park/Public Facilities	2.9	0	0	0
Right of Way	3.2	0	0	0
<b>Total</b>	<b>31.6</b>	<b>60,984</b>	<b>128,502</b>	<b>420</b>

Source: ADE, Inc.; data from City of Suisun

## **DESCRIPTION OF POTENTIAL PROJECTS**

### **Residential Uses**

This scenario assumes that 16.8 acres on the site will be developed at an average density of 25 DU per acre. At this density, the site can potentially support 420 housing units.

### **Service/Commercial Uses**

Service/commercial uses would potentially encompass a variety of light industrial, repair services, business support services, and wholesale trade activities. At a typical TOD density of 0.5 FAR, the 5.9 acres allocated to these uses would potentially support over 128,500 square feet of new building space.

### **Retail Development**

The 2.9 acres allocated to retail uses would potentially support nearly 61,000 square feet of new retail space.

## **5.7 FUTURE PLANNED UNIT DEVELOPMENT (PUD) SITE**

This 5.3-acre site encompasses a total of 17 parcels, and covers the area bounded by Lotz Way to the north, and Civic Center Boulevard to the east. Bay Drive and Driftwood Drive are streets running east-west that run through the site. These parcels are owned by the Suisun City Redevelopment Agency, and except for a parking lot along Driftwood Drive, the site is currently vacant. The parcels north of Driftwood Drive encompass a total of 1.9

acres. This site was analyzed separately from the others because it does not have existing uses, and is a contiguous site for potential future development under a single ownership.

## **DESCRIPTION OF POTENTIAL PROJECTS**

### **Residential Uses**

This scenario assumes that the 5.3 acres could be developed at an average density of 25 DU per acre. At this density, the site would potentially support 133 housing units.

### **Retail Development**

The 1.9 acres north of Driftwood Drive would be allocated to retail development. Under mixed use development, this would potentially support about 13,700 square feet of new retail space.

## **5.8 DENVERTON CURVE SITE DEVELOPMENT SCENARIO**

The Denverton Curve site was the subject of a previous fiscal study in 2007. That analysis identified the Denverton Curve site as a potential location for office development, or replacement site for parking if the Park & Ride lot is converted to other land uses. The development scenario for the Denverton Curve site assumed about 29,500 square feet of office development.

## **5.9 OPTIONAL PROJECTS**

This section describes additional potential projects that can be considered for future downtown development. These uses assume densities appropriate to transit-oriented development.

### **ENTERTAINMENT USES**

The TOD scenarios have the Park & Ride lot configured for office space. As an alternative, the site can be divided between office spaces and entertainment uses. This takes advantage of the site's proximity to the proposed waterfront hotel development, and it shortens the potential time needed to fully occupy the site by reducing the amount of office square footage. With entertainment uses also occupying the site, office space would total approximately 76,700 square feet. As with the TOD scenarios, building development averaging fewer than four stories would require constructing underground or multilevel parking structures.

If these entertainment uses focus on a movie theater, a supportable theater configuration with six screens would require about 27,000 square feet, with the remaining land area used for parking. The preferred urban form would place the building footprints close to the street with the parking access towards the back.

### **TRAVIS COURT COMMERCIAL SPACE**

Residential Site 3 at the end of Travis Court could potentially serve as a location for additional ground level commercial space. Due to the commercial spaces under construction

along Main Street and proposed with the mixed use developments, the TOD scenarios do not propose any new commercial space along Travis and Benton Court. However, with higher density housing, particularly as proposed under the Residential Conversion scenario, commercial spaces in close proximity to the new housing can meet a variety of local needs. These spaces can also function as a focal point for the neighborhood and attract outside patrons if integrated into an attractive environment.

## **SACRAMENTO STREET REALIGNMENT AND REUSE**

The proposed realignment of the Highway 12 off-ramp onto Sacramento Street creates numerous challenges and potential opportunities. This project would basically turn Sacramento Street into a primary entry for downtown Suisun City. The existing street alignment consists of two vehicular traffic lanes, with single-family residences as the primary adjacent uses. Currently, Sacramento Street provides limited access to the interior of the downtown district. Benton and Travis Courts do not connect directly to Sacramento Street, and travel from Sacramento Street to other parts of downtown require either turning onto Main Street or using alleyways.

Funneling traffic onto Sacramento Street from Highway 12 would conflict with these existing uses and transportation patterns. As downtown Suisun City transitions into a high density neighborhood, the uses along Sacramento Street will likely also transition into other uses. As planning for the downtown area moves forward, the new role of Sacramento Street needs to be taken into account. Potential issues under consideration would include how to connect Travis or Benton Court with Sacramento Street, whether to encourage commercial development and/or higher densities along Sacramento Street, and whether to acquire selected parcels.

## **MAIN STREET PARKING LOT REUSE**

The parking lot at the corner of Driftwood Drive and Main Street would be a suitable site for future mixed use development. As in-fill development moves forward along the rest of Main Street, this site could be developed in order to create a building frontage more consistent with other higher density developments and existing buildings. Alternatively, the prevalence of higher density development would create more demand for off-street parking sites.

## **5.10 ASSESSMENT OF SCENARIOS**

### **COMMERCIAL USES (INCLUDING COMMERCIAL PORTION OF MIXED USE DEVELOPMENTS)**

The retail market analysis identifies several categories for new commercial business attraction, and the thresholds necessary to support new retail development. The retail categories most appropriate for downtown development, with sufficient unmet market demand to new establishments, include specialty retail categories (such as a florist, jeweler, and miscellaneous specialty retail), food stores, furniture/home furnishings, and household appliances/electronics.

In addition, as new households and other businesses come into the downtown area, this creates additional demand for new retail stores. The store types with relatively low market thresholds to support new establishments include eating places, food stores, and miscellaneous specialty stores.

The amount of new commercial space in the three downtown scenarios is less than 25,000 square feet, with the Hoffman site supporting an additional 61,000 square feet and about 13,700 square feet at the future PUD site. The amount of supportable retail space identified in the retail market analysis totaled nearly 230,000 square feet. While this would seem to indicate a large amount of market potential for the downtown area, the majority of the square footage potential is in general merchandise, which requires a large-scale building footprint that is inappropriate for a downtown transit-oriented development configuration. In addition, the amount of commercial square footage in Suisun City is already due for a large increase with over 31,000 square feet of new commercial space (located along Main Street, south of Sacramento Street) already under construction or under review in the downtown area, and a proposed Wal-Mart recently approved by the City. Furthermore, substantial vacancies already exist in the Marina Center and former Albertson's site at Sunset Center.

Because of these existing conditions, any of the commercial space (including those spaces that are part of mixed use developments) identified in the scenarios beyond those projects already under construction or under discussion will not likely come online until 2013 at the earliest. Assuming that market conditions by 2013 allow for sufficient commercial growth, buildout of these uses could potentially occur within a five-year time period afterwards.

## **OFFICE USES**

The projected 10-year growth for office uses totals approximately 91,800 square feet using the ABAG 10-year growth rates, and approximately 244,400 square feet using the EDD growth rates. The 144,200 to 207,000 square feet of designated office space in the TOD scenarios exceeds the lower ten-year office demand projection, while full development of that square footage would still be below the total growth projected using the EDD growth rates.

Much of the projected market potential for office uses is in health care. The Park & Ride lot site is likely too small for a major medical center, but would be an appropriate size for a medical professional office building or primary care facility. Both Sutter Health and Kaiser Permanente have had large operational expansions in Solano County in recent years, with Sutter Health constructing a major facility expansion in Fairfield along Highway 12. The ability to attract health care operations affects the overall potential for office uses. If these types of uses cannot be attracted to Suisun City, then the market potential for office uses will require a longer time frame.

Interviews with local commercial brokers indicate that Solano County's stagnant office market will take at least two more years before market conditions become favorable for new

projects. In addition, three projects located south of Sacramento Street along Main Street, with approximately 21,600 square feet of office space, are currently under construction or under plan review. With this in mind, the office uses identified in all the development scenarios will not likely be able to start coming online until around 2013. Unless a large single-user can be attracted to the site, buildout of the site would potentially need to be phased in over several years with multiple buildings. Developing the entire Park & Ride site as a phased-in office development would require a potential buildout time out to 2027. The additional potential office spaces identified along the proposed frontage road would require a similarly long buildout phase.

As an optional project that incorporates entertainment uses, using the Park & Ride site for 76,700 square feet of office space would require a buildout time period through 2018, with the remaining acreage allocated for entertainment uses. The existing market potential for entertainment uses can support about a six-screen movie theater. While this theater configuration fits the market and can serve as a good anchor use for the downtown area, these types of smaller theater configurations face competitive pressures from the larger megaplexes that currently dominate the market, and the major theater chains generally do not develop theaters with as few as six screens. The City has already been in contact with potential theater operators, and they indicated that competitive pressures from existing movie theaters elsewhere in Solano County limit the feasibility of developing a theater in Suisun City.

## **R&D/FLEX SPACE**

The projected 10-year growth for R&D/flex space uses totals approximately 48,200 square feet using the ABAG 10-year growth rates, and approximately 117,500 square feet using the EDD growth rates.<sup>15</sup> The R&D/Flex Conversion Scenario has a total buildout of 67,000 square feet. This indicates that these uses could potentially be filled within this time period, but economic conditions that have negatively affected the office and industrial markets are likely to extend the time required. In addition, many R&D/flex uses can be accommodated in more traditional office or industrial spaces. Industrial space in Suisun City and Solano County in particular is plentiful. Because of these underlying conditions, the analysis assumes that R&D/flex space is more of a long-term initiative, with buildout not occurring until around 2032.

The market for these types of uses would potentially bring higher value added jobs into Suisun City because they can include technology-driven industries and support activities that serve those industries. The R&D/Flex Conversion Scenario assumes that this type of development would be at a density that can support transit ridership, while also connecting to Highway 12 using a new connector ramp. This scenario would potentially create a regionally focused employment center, and benefit from the visibility and connectivity to Highway 12.

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<sup>15</sup> The square footage potential for some R&D/flex space uses (information technology, professional services, and administrative services) overlaps with office uses.



## **SERVICE/COMMERCIAL**

The projected 10-year growth for service/commercial space totals about 72,500 square feet using the ABAG 10-year growth rates, and about 172,900 square feet using the EDD growth rates. The Hoffman Site Development scenario identifies over 129,300 square feet of potential service/commercial development, if these uses are developed at typical TOD densities. This indicates that the potential uses could be filled within the 10-year time frame. However, as with the R&D/flex space uses, the market potential for service/commercial uses is negatively impacted by the economic downturn and the plentiful supply of industrial space that exists throughout Solano County. Therefore, the scenario assumes that development potential would not begin until 2013, and the uses would be phased in over a four year period thereafter.

## **RESIDENTIAL**

The market for residential uses in Solano County will remain weak for the foreseeable future, therefore any major residential projects for the downtown area should be considered long-term prospects. Aside from the mixed use developments already proposed or under discussion, the analysis anticipates that market conditions will allow for new residential downtown residential development by 2013. The time to buildout for 81 housing units projected in the In-Fill Development and R&D/Flex Conversion scenarios goes through 2020. The time to buildout for the 244 housing units projected in the Residential Conversion Scenario extends through at least 2027. For the Hoffman site, the scenario assumed that the site would be developed beginning in 2013, with 420 housing units phased in over a period of four years. Similar assumptions were used for the 133 units identified for the future PUD site.

## **5.11 JOB CREATION AND TARGET INCOME GROUP BENEFIT**

This section identifies the potential job creation and Target Income Group benefit from each of the development scenarios. Because some of these scenarios present different alternatives for the same geographic area, the TIG benefit identified in Table 5-6 should not be considered cumulative.

### **DOWNTOWN DEVELOPMENT SCENARIOS**

The three downtown development scenarios will potentially create between 313 and 449 jobs, with the highest potential job creation in the R&D/Flex space scenario. The calculations assume 500 square feet per job for office and R&D/Flex space uses, and 1,000 square feet per job for the commercial and retail positions.

Occupations in the sales, clerical, services, or production and laborer positions are the ones that typically benefit workers in the target income group. Out of the potential new jobs that would be created in the three downtown development scenarios, between 173 and 258 of these jobs would be in the target income group occupations. This represents 55 to 58 percent of the total job creation under these development scenarios. Overall, the largest TIG occupational category under these scenarios is clerical.

## HOFFMAN SITE

Development of the Hoffman Site will result in about 153 new jobs. Most of these jobs will be in service/commercial industries, using an assumption of 1,400 square feet per job. Of the 153 jobs that would be created at the Hoffman Site, 127 of them (83 percent) potentially benefit workers in the Target Income Group. The largest TIG occupation categories are sales and production occupations.

## PUD SITE

The PUD site will potentially create 14 new retail jobs. Of this total, 12 of the new positions (90 percent) would benefit workers in the Target Income Group. The largest occupational category is with sales positions.

## DENVERTON CURVE

Full development of the Denver Curve site will result in 59 new jobs in office-based industry sectors. Among these jobs, about 31 of the positions (52 percent) will benefit workers in the Target Income Group. The largest TIG occupational category is with clerical positions.

**TABLE 5-6  
TARGET INCOME BENEFIT**

Business Type	Total Job Potential	Managers/ Admin.	Prof./ Technical	TARGET INCOME GROUP OCCUPATIONS				TIG Total
				Sales	Clerical	Services	Production/ Ag.	
<b>JOB POTENTIAL FROM IN-FILL DEVELOPMENT SCENARIO</b>								
Commercial Jobs	25	2	1	15	3	1	4	22
Office Jobs	288	27	111	14	88	31	18	150
<b>Scenario Total</b>	<b>313</b>	<b>28</b>	<b>112</b>	<b>28</b>	<b>90</b>	<b>33</b>	<b>21</b>	<b>173</b>
<b>JOB POTENTIAL FROM RESIDENTIAL CONVERSION SCENARIO</b>								
Commercial Jobs	25	2	1	15	3	1	4	22
Office Jobs	356	33	137	17	108	38	22	186
<b>Scenario Total</b>	<b>381</b>	<b>35</b>	<b>138</b>	<b>32</b>	<b>111</b>	<b>40</b>	<b>26</b>	<b>208</b>
<b>JOB POTENTIAL FROM R&amp;D/FLEX SPACE SCENARIO</b>								
Commercial Jobs	25	2	1	15	3	1	4	22
Office Jobs	288	27	111	14	88	31	18	150
R&D/Flex Space Jobs	135	13	37	9	41	23	13	86
<b>Scenario Total</b>	<b>449</b>	<b>42</b>	<b>149</b>	<b>37</b>	<b>131</b>	<b>55</b>	<b>34</b>	<b>258</b>
<b>JOB POTENTIAL FROM HOFFMAN SITE DEVELOPMENT</b>								
Retail Jobs	61	4	2	36	7	4	9	55
Service Commercial Jobs	92	8	12	8	15	1	47	72
<b>Scenario Total</b>	<b>153</b>	<b>12</b>	<b>14</b>	<b>44</b>	<b>22</b>	<b>5</b>	<b>56</b>	<b>127</b>
<b>JOB POTENTIAL FROM PUD SITE DEVELOPMENT</b>								
Retail Jobs	14	1	1	8	2	1	2	12
<b>JOB POTENTIAL FROM DENVERTON CURVE SITE</b>								
Office Jobs	59	5	23	3	18	6	4	31

Source: ADE, Inc., data from California EDD Occupational Employment Statistics

## 6. FISCAL ANALYSIS

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Using the Suisun City fiscal model developed by ADE in 2006 and 2007, we have prepared a comparative analysis of the development scenarios. The fiscal model analyzes the phasing projections for each scenario and calculates a net present value for the cumulative fiscal effects in 2008 dollars. The phasing scenarios have been previously described in the report and are shown in Tables A-1, A-3, A-5, and A-7 in the appendix. The ability of the Hoffman Site Development and Residential Conversion scenarios to develop more quickly, by focusing on residential development, is one factor in helping to generate the best fiscal return for the City among the four scenarios.

The fiscal analysis is summarized in Table 6-1, based on the more detailed fiscal projections shown in the appendix (Tables A-2, A-4, A-6, and A-8). The main portion of the table shows the annual revenue/cost balance in the year 2032. At the bottom of the table, the cumulative net revenue (revenue minus costs) is also shown for the entire 2008-2032 period. The cumulative net revenue is then converted to net present value figures. At the very bottom of the table, the annual redevelopment tax increment is projected for each scenario. This is shown separately, because these revenues accrue to the Redevelopment Agency and would not be part of the City General Fund, which is the focus of the other figures in the table.

In terms of total revenue, the Hoffman Site Development scenario produced the highest annual total with \$1.4 million. Among the downtown development scenarios, the Residential Conversion scenario produces the highest revenue total with \$786,132. Compared to the other scenarios, the Hoffman Site and Residential Conversion scenarios generates higher revenues through inter-governmental agencies such as motor vehicle in-lieu and gas tax. In addition, the development pattern in this scenario also collects more fees for services. Because of its higher retail component, the Hoffman Site scenario generates considerably higher sales and use tax revenues than the other scenarios.

As noted above, this area of town is within the City's Redevelopment Project Area, and thus the net growth in assessed value does not generate additional property tax revenue for the General Fund, but rather is accumulated as tax increment for the Redevelopment Agency. Hence the \$0 property tax revenue in the first line of the table.

For the sales tax calculation, it should be noted that we assumed that the retail included in the mixed use developments in the scenarios would capture about 25 percent of the household spending from the new residential units in the scenario. The model calculates sales tax based on the commercial square footage in each scenario, plus 75 percent of household spending, which is anticipated to be captured elsewhere in Suisun. This is somewhat of a departure from the approach taken in the previous Revenue-Based Land Use study, in which sales tax in mixed use projects was only calculated on the basis of the new retail space. With the approval of the Wal-Mart project in eastern Suisun, it is much more likely now that the City would gain the full benefit of household spending within its borders.

Because of its large size and mix of uses, the Hoffman Site has a higher overall cost, while still generating the highest net revenue and redevelopment tax increment. Among the other three scenarios, Residential Conversion scenarios have the highest overall cost, primarily due to the increased residential development in these scenarios. However, among the three downtown scenarios, the R&D/Flex Conversion scenario has the highest annual and cumulative net revenue. The Residential Conversion scenario generates more tax increment for the Redevelopment Agency due to higher assessed values. Because of these higher expenditures, the R&D/Flex Space scenario has a higher annual and cumulative net revenue, and ranks first among the three downtown scenarios.

**TABLE 6-1  
YEAR 2032 SUMMARY OF FISCAL IMPACTS OF TRANSIT-ORIENTED  
DEVELOPMENT SCENARIOS**

<b>ANNUAL FISCAL EFFECT YEAR 2032</b>	<b>Infill Scenario</b>	<b>Residential Conversion Scenario</b>	<b>R&amp;D/Flex Conversion Scenario</b>
<b>REVENUES</b>			
TAXES AND FINES			
General Fund Property Tax	\$0	\$0	\$0
Sales & Use Tax	\$190,407	\$207,527	\$281,548
Franchise Fees	\$18,161	\$34,315	\$23,710
Real Property Tsf. Tax	\$2,045	\$3,984	\$2,257
Transient Occupancy Tax	\$0	\$0	\$0
USE OF MONEY OR PROPERTY:			
Investment Income	\$10,517	\$15,276	\$14,690
INTER-GOVERNMENTAL AGENCIES			
Motor Vehicle-in-lieu	\$21,099	\$67,836	\$21,099
Gas Tax	\$4,874	\$15,672	\$4,874
FEES FOR SERVICES			
Finance	\$5,490	\$10,373	\$7,167
Police Protection	\$6,028	\$11,389	\$7,869
Fire Protection	\$213	\$402	\$277
Engineering	\$1,081	\$2,042	\$1,411
Recreation	\$11,157	\$21,081	\$14,566
Senior Center	\$2,018	\$6,488	\$2,018
OTHER REVENUE	\$632	\$1,195	\$826
COMMUNITY FACILITIES DISTRICT	\$260,624	\$388,552	\$349,097
<b>TOTAL REVENUES</b>	<b>\$534,346</b>	<b>\$786,132</b>	<b>\$731,410</b>
<b>EXPENDITURES</b>			
GENERAL GOVERNMENT			
BUILDING DEPARTMENT	\$45,371	\$85,724	\$59,232
Public Facilities	\$19,517	\$36,876	\$25,480
POLICE DEPARTMENT	\$105,211	\$198,789	\$137,355
FIRE DEPARTMENT	\$33,209	\$62,745	\$43,354
COMMUNITY DEVELOPMENT			
Planning	\$11,015	\$20,812	\$14,380
PUBLIC WORKS			
Engineering	\$1,757	\$3,319	\$2,293
Streets Maintenance	\$13,153	\$24,851	\$17,171
Parks Maintenance	\$14,544	\$27,480	\$18,987
RECREATION & COMMUNITY SERVICES			
Recreation	\$24,676	\$46,624	\$32,215
Community Center	\$1,818	\$5,847	\$1,818
Senior Center	\$1,501	\$4,825	\$1,501
<b>TOTAL EXPENDITURES</b>	<b>\$271,772</b>	<b>\$517,892</b>	<b>\$353,788</b>
<b>NET REVENUE 2032</b>	<b>\$262,575</b>	<b>\$268,239</b>	<b>\$377,622</b>
CUMULATIVE NET REVENUE 2008-2032	<b>\$3,819,579</b>	<b>\$3,928,574</b>	<b>\$4,305,163</b>
NET PRESENT VALUE 2008-2032	<b>\$1,079,187</b>	<b>\$1,107,866</b>	<b>\$1,147,580</b>
Redevelopment Tax Increment	\$128,312	\$218,300	\$148,365

Source: ADE, Inc.

**TABLE 6-1 (CONT.)**  
**YEAR 2032 SUMMARY OF FISCAL IMPACTS OF TRANSIT-ORIENTED**  
**DEVELOPMENT SCENARIOS**

ANNUAL FISCAL EFFECT YEAR 2032	Hoffman Site	Denver-ton Curve Site	Future PUD Site
<b>REVENUES</b>			
TAXES AND FINES			
General Fund Property Tax	\$0	\$0	\$0
Sales & Use Tax	\$664,205	0	114,079
Franchise Fees	\$48,483	2,083	11,649
Real Property Tsf. Tax	\$6,621	253	1,938
Transient Occupancy Tax	\$0	0	0
USE OF MONEY OR PROPERTY:			
Investment Income	\$37,548	155	7,689
INTER-GOVERNMENTAL AGENCIES			
Motor Vehicle-in-lieu	\$116,600	0	36,923
Gas Tax	\$26,938	0	8,530
FEES FOR SERVICES			
Finance	\$14,656	514	3,521
Police Protection	\$16,091	995	3,866
Fire Protection	\$567	63	136
Engineering	\$2,885	3	693
Recreation	\$29,785	540	7,156
Senior Center	\$11,152	0	3,532
OTHER REVENUE	\$1,688	884	406
COMMUNITY FACILITIES DISTRICT	\$457,627	38,922	83,875
<b>TOTAL REVENUES</b>	<b>\$1,434,847</b>	<b>\$44,412</b>	<b>283,994</b>
<b>EXPENDITURES</b>			
GENERAL GOVERNMENT	\$121,118	3,782	\$29,101
BUILDING DEPARTMENT			
Public Facilities	\$52,102	2,424	12,518
POLICE DEPARTMENT	\$280,865	14,237	67,482
FIRE DEPARTMENT	\$88,651	3,771	21,300
COMMUNITY DEVELOPMENT			
Planning	\$29,405	1,754	7,065
PUBLIC WORKS			
Engineering	\$4,689	616	1,127
Streets Maintenance	\$35,112	1,644	8,436
Parks Maintenance	\$38,825	3,319	9,328
RECREATION & COMMUNITY SERVICES			
Recreation	\$65,874	1,412	15,827
Community Center	\$10,049	0	3,182
Senior Center	\$8,293	0	2,626
<b>TOTAL EXPENDITURES</b>	<b>\$734,984</b>	<b>32,958</b>	<b>177,993</b>
<b>NET REVENUE 2032</b>	<b>\$699,862</b>	<b>11,454</b>	<b>106,001</b>
CUMULATIVE NET REVENUE 2008-2032	<b>\$9,760,569</b>	<b>154,389</b>	<b>1,617,539</b>
NET PRESENT VALUE 2008-2032	<b>\$2,444,111</b>	<b>35,963</b>	<b>440,125</b>
Redevelopment Tax Increment	\$318,833	\$21,225	\$84,847

Source: ADE, Inc.

## **7. IMPLEMENTATION APPROACHES**

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This section identifies implementation approaches and potential action items that would be applied towards transitioning downtown Suisun City towards more of transit-oriented development pattern. Even though downtown Suisun City does not share many of the characteristics typical of areas that have implemented transit-oriented development plans, some of the implementation used in those projects and processes can be applied towards creating a more vibrant downtown, and better utilizing the transit assets that are already in place. Other implementation items look at existing conditions that should be addressed in order to work towards a TOD pattern.

### **7.1 PHYSICAL ENVIRONMENT ENHANCEMENTS**

#### **EXPLORE OPTIONS FOR ENHANCING PEDESTRIAN ACTIVITY WITHIN DOWNTOWN SUISUN CITY**

All three development scenarios propose conversion of existing light industrial areas west of Main Street into residential blocks. The existing streetscape along the north-south streets (Benton and Travis courts) presents some obstacles to pedestrian activity. Many of the pedestrian pathways directly front onto parking lots, and some sidewalks are not contiguous. In addition, the rights-of-way do not connect to Sacramento Street to the south and Spring Street to the north. This forms a barrier that forces pedestrians and vehicles alike onto Main Street where they need to walk/drive around the block in order to go to the train station and bus stops.

The Suisun Waterfront has had numerous streetscape improvements already done. Extending these types of improvements into the blocks west of Main Street will create a more pedestrian-friendly environment while helping to unify the overall design theme for the downtown area and connect the waterfront with the areas of downtown that run closer to the railroad.

Implementation actions that should be considered include a design concept plan for streetscape improvements and updating any existing circulation improvement plans.

#### **ADDRESS ACCESS OPTIONS FOR CONNECTING SACRAMENTO STREET TO BENTON COURT AND THE TRAIN STATION**

Sacramento Street has been identified as a potential connector route to Highway 12. Construction of this project would transform Sacramento Street, currently a two-lane residential street consisting of single-family houses, into a primary downtown access route that funnels traffic onto Main Street. A connector ramp that terminates at Sacramento Street presents an opportunity to create another north-south access road that would supplement Main Street. The options for this route would include creating a new frontage road parallel to the railroad, or extending the Benton Court right-of-way so that it directly connects with Sacramento Street.

Creating a new frontage road would potentially require considerable effort and expense, because the right-of-way is currently owned and operated by the BNSF railroad.

## **ADDRESS OPTIONS FOR CONNECTING SPRING STREET AND RAILROAD AVENUE WITH BENTON COURT**

The three development scenarios propose a pedestrian right-of-way that connects Benton Court with Spring Street and Railroad Avenue. Currently, a land parcel with a vacant industrial building and strip commercial building forms a dead end on Benton Court. Options for connecting Benton Court with Spring Street and Railroad Avenue include the following:

- Creating a narrow pedestrian access way using an easement that maintains one or both of the existing land uses;
- Acquiring the entire parcel and using the land to extend Benton Court all the way through to Spring Street and/or Railroad Avenue;
- Focus the north-south access onto a new frontage road parallel to the railroad.

## **7.2 BUSINESS ATTRACTION ACTIVITIES**

### **TARGET INDUSTRY ATTRACTION EFFORTS TOWARDS SECTORS THAT SUPPORT AND EXPAND UPON REGIONAL STRENGTHS**

Industry attraction efforts should focus on those sectors that have the best growth prospects in the region. This entails targeting businesses that complement large industries that already have a strong presence in Solano County, as identified by their economic roles in Section 2.4. For example, health services have shown tremendous historical and projected growth. In turn, they generate demand for supplier businesses that provide support services and equipment. Attracting the supplier businesses is one way of capitalizing on an existing advantage.

### **COORDINATE RETAIL ATTRACTION EFFORTS**

As indicated in the retail market analysis, Suisun City has a very large proportion of local spending that leaves the community. However, the community also has numerous retail attraction opportunities, and has begun to attract developer interest in new commercial spaces. These new retail projects include the Wal-Mart in eastern Suisun City, and the new mixed use commercial projects in downtown Suisun. In addition, other retail commercial development sites throughout Suisun City have been identified.

As these retail projects move forward, and additional commercial sites are proposed for the downtown area, it is important that the City coordinate these efforts and ensure that they do not overlap and go beyond the market's ability to support these uses. This is an especially important consideration if the Marina Shopping Center is retained as a retail center.



## **IDENTIFY OPTIONS FOR ATTRACTING HEALTH CARE USES**

Even though Suisun City is a potential location for a wide range of different office uses, the most prominent business attraction prospects center on health care. Suisun City does not have a large existing base of health care providers and facilities, while Fairfield and Vacaville have had major facility expansions in recent years. Downtown Suisun would make a suitable site for professional medical offices or a primary care facility. The City should establish contact with the major health care providers in Solano County, including Kaiser Permanente and Sutter Health. In other communities, these providers have supplemented their large-scale medical hospitals with smaller neighborhood facilities, and Suisun City could potentially be promoted as suitable location for any community health initiatives that these health care providers might have.

## **IDENTIFY ALTERNATIVE LOCATIONS FOR TRANSITIONING EXISTING INDUSTRIAL USES FROM DOWNTOWN LOCATIONS**

In each of the three development scenarios, many of the existing industrial uses in downtown Suisun City will be transitioned into housing and/or R&D/flex space. While some of these spaces are underutilized, many other industrial parcels are currently occupied by viable businesses that generate employment and create revenue for the City. For these light industrial businesses, alternative locations should be identified and promoted. This would help retain viable local businesses in Suisun City, while helping to transition the downtown area towards a new more urban vision.

Currently, service commercial and light industrial businesses are located at Railroad Avenue opposite the intersection with Marina Avenue. Additional land for similar development exists southwest of the current development along the railroad tracks.

## **7.3 POLICY CONSIDERATIONS**

### **PRIORITIZE IN-FILL DEVELOPMENT AND RIGHT-OF-WAY ACCESS ISSUES**

In-fill developments on existing vacant properties are included with all three development scenarios. These are the projects that should be prioritized first before conversion of existing uses. The vacant properties along Main Street are prominent due to their visibility from the waterfront. In addition, the vacant parcel at the south end of Travis Court (Residential Site 3) should be targeted as the first high density residential project west of Main Street. Concurrent to the development process beginning for these projects, the City should also resolve right-of-way access issues, particularly with connecting Benton Court with Spring Street and Railroad Avenue.

### **CONSIDER OPTIONS FOR USING FORM-BASED CODES AS A MECHANISM FOR CREATING DESIRED URBAN FORM**

Form-based codes are an increasingly used planning mechanism that emphasizes urban form and design standards, rather than traditional codes based on land use and density. The advantage to this approach is that it grants considerable flexibility to planning projects,

allowing for a multitude of uses and densities, so long as the building form follows an established set of design guidelines. In addition, form-based codes allow for developments to more rapidly address changes in the local market conditions. Rather than dictate that an entire district conform to a particular land use, a form-based code would potentially allow for housing to be located on the same block with office uses and even light manufacturing, depending on which land use best addresses existing market opportunities. As long as the building design fits into the context of a particular district, this juxtaposition of uses is allowed.

The disadvantage to this approach is that there is less certainty over the type of land use that will emerge within an area using a form-based code. This makes modeling of fiscal scenarios very difficult. For transit-oriented development, a form-based code can be an effective tool for creating walkable neighborhoods with an urban presence. While it does not create any assurance that the resultant development will occur at a density that will potentially increase transit ridership, form-based codes can still result in the kind of density that is often spelled out in TOD plans.

Whether to go with this type of approach is a question to be answered during a general plan update or specific planning process. For any planning initiative that includes the downtown district, going to a form-based should be considered as an option.

## **7.4 SITE PREPARATION**

### **EXPLORE DEVELOPMENT OPTIONS FOR UNDERUTILIZED PROPERTIES**

Residential sites 1 and 2 along Travis Court were identified as potentially underutilized parcels. These sites are the only ones with existing uses identified as potential projects in all three development scenarios. Because they have existing uses and are currently under private ownership, the City should identify and prioritize potential approaches for transitioning these sites towards residential uses. Options would include approaches such as financing incentives, property acquisition, assisting the property owner with parcel assemblage, public area improvements, infrastructure improvements, and property swaps.

### **EXPLORE SHARED PARKING OPTIONS WITHIN DOWNTOWN SUISUN CITY**

Many of the projects proposed in the three development scenarios entail densities much higher than the existing land use pattern. Currently, parking is not an issue in downtown Suisun City. Most businesses provide on-site parking, and there is generally an excess of parking spaces in the downtown area. If new projects are built to densities typical of transit-oriented development, this places a strain on the available land for surface parking.

With this in mind, the City should look into potential locations for shared parking options. Some spaces for shared parking could be created within areas currently used as public rights-of-way, such as Common Street and Travis Court. Neither of these streets are used as prominent access ways, and the reconfiguration of residential sites 1 and 2 can potentially create space for a shared surface parking lot or structure. Another site for shared parking

would be the office and entertainment uses site (currently used as the CalTrans Park & Ride lot).

## **EXPLORE OPTIONS FOR REPLACEMENT OF PARK & RIDE LOT PARKING SPACES, AND JOINT DEVELOPMENT OPTIONS WITH CALTRANS**

The Park & Ride lot has been identified as a potential development opportunity site. The primary constraint is its existing usage, and the fact that CalTrans has full control over the site. A common practice among transit agencies is to engage in joint development arrangements in order to facilitate TOD projects. The City should establish contact with CalTrans to identify any TOD projects that the agency would potentially participate in.

If CalTrans does not want to participate in a joint development project, then the City can arrange to swap the land for another parcel to be used as surface parking, or identify options for assisting with developing a parking structure to replace the existing surface parking. The land area freed up by the parking structure can then be used for the recommended office and/or entertainment uses identified in the three development scenarios.

A land swap would most likely involve the Denverton Curve parcel. This 2.7 acre site is currently under private ownership and was identified in a previous study as a potential commercial site or as a parking site to replace the existing Park & Ride lot, which would be developed as a commercial center. With new commercial development activity already ongoing in other locations, this site would likely better serve as a replacement parking site in the event that the existing Park & Ride parking spaces cannot be accommodated after new development occurs on the site. The City should consider acquisition or land swap options in conjunction with the current land owner and CalTrans.

## **7.5 FUNDING RESOURCES**

### **IDENTIFY FUNDING RESOURCES FOR TRANSIT-ORIENTED DEVELOPMENT AND RELATED ENABLING ACTIVITIES**

A variety of funding sources can be used in conjunction with TOD projects, and related infrastructure and development projects. Some of the funding resources that can be used to implement some of the projects described in the development scenarios are described below.

#### **Local Funds**

Redevelopment funds are the most common way that municipalities participate in TOD projects. This usually entails using tax-increment financing to construct streetscape, utilities, parking structures, and other infrastructure improvements, as well as acquiring land.

Downtown Suisun City lies within a redevelopment project area, and the Redevelopment Agency already owns several parcels in the downtown area, including most of the site for the proposed waterfront hotel. Other funding sources often used by local governments to assist

with TOD projects include special assessments and providing matching funds for grant-funded improvement projects.<sup>16</sup>

### **State Community Development Block Grant (CDBG)**

California's State Small Cities CDBG Program is administered through the Department of Housing and Community Development as Federal pass-through funds that originate with US Department of Housing and Urban Development (HUD). CDBG provides grants opportunities for economic development activities that result in the creation and/or retention of jobs for low-income workers within the period of the grant. For Suisun City, this is relevant to development projects that create jobs. The Over-the-Counter (OTC) component provides funds to eligible city and/or county governments to carry out economic development activities in support of specific businesses that must be identified in the grant application. The OTC Component provides funds for the following activities in support of specific businesses:

- Grants for public infrastructure (with private sector Fair Share repayment obligations)
- Loans or loan guarantees to businesses for construction, on-site improvements, equipment purchase, working capital, and site acquisition
- Loans for business start-ups
- Loans or grants for small business incubators

### **California Infrastructure and Economic Development Bank (I-Bank)**

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. Loan funds may be used for projects incorporating:

- City streets
- County and state highways
- Drainage
- Water supply and flood control
- Educational facilities
- Environmental mitigation measures
- Parks and recreation facilities
- Port facilities
- Public transit

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<sup>16</sup> Cervero, et al; pp.79-80.

- Sewage collection and treatment
- Solid waste collection and disposal
- Water treatment and distribution
- Defense conversion
- Public safety facilities
- Power and communications facilities

Loan terms are set for the project's useful life or 30 years, whichever is less; and, in most cases, there is no prepayment penalty. The transaction also includes a fee due at loan closing; however, it can also be financed as part of the loan.

### **Federal Transportation Funds**

Since 1991, the landmark ISTEA and follow-up TEA-21 funding bills have been used for funding a broad range of activities related to transit-oriented developments. These activities include rail safety projects, streetscape improvements, bond financing, and construction. Typically, these funds were administered by state governments and distributed through metropolitan planning organizations (such as MTC) under a competitive application process. The most recent reauthorization of the TEA-21 program is called the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU). This reauthorizes funding for the program through 2009.

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# APPENDIX A: FISCAL TABLES

TABLE A-1  
DEVELOPMENT PHASING FOR INFILL SCENARIO

ANNUAL	Buildout	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>Units - Annual</b>													
Single Family	0	0	0	0	0	0	0	0	0	0	0	0	0
Multi-family	81	0	5	4	0	0	30	0	6	0	0	11	10
<b>Sq.Ft. - Annual</b>													
Office	144,184	0	0	0	0	0	36,046	0	0	0	0	36,046	0
Retail	24,928	0	5,200	4,700	0	0	5,700	0	5,190	0	4,138	0	0
R&D/Flex	0	0	0	0	0	0	0	0	0	0	0	0	0
Service/Commercial	0	0	0	0	0	0	0	0	0	0	0	0	0
	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>2030</b>	<b>2031</b>	<b>2032</b>
<b>Units - Annual</b>													
Single Family	0	0	0	0	0	0	0	0	0	0	0	0	0
Multi-family	10	0	0	0	0	0	0	0	0	0	0	0	0
<b>Sq.Ft. - Annual</b>													
Office	0	0	36,046	0	0	0	0	36,046	0	0	0	0	0
Retail	0	0	0	0	0	0	0	0	0	0	0	0	0
R&D/Flex	0	0	0	0	0	0	0	0	0	0	0	0	0
Service/Commercial	0	0	0	0	0	0	0	0	0	0	0	0	0

Source: ADE, Inc.

**TABLE A-2  
INFILL SCENARIO FISCAL IMPACT 2008-2020**

<b>REVENUES</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>
<b>TAXES AND FINES</b>													
General Fund Property Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Sales & Use Tax	\$0	\$19,566	\$38,341	\$39,491	\$40,676	\$67,457	\$69,481	\$94,945	\$97,794	\$120,191	\$124,537	\$128,965	\$133,547
Franchise Fees	\$0	\$366	\$695	\$716	\$737	\$3,840	\$3,956	\$4,560	\$4,696	\$4,998	\$7,470	\$8,248	\$9,066
Real Property Tsf. Tax	\$0	\$327	\$333	\$132	\$134	\$2,097	\$623	\$1,018	\$723	\$738	\$1,493	\$1,718	\$1,832
Transient Occupancy Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>USE OF MONEY OR PROPERTY:</b>													
Investment Income	\$0	\$867	\$1,680	\$1,722	\$1,773	\$3,468	\$3,511	\$4,664	\$4,791	\$5,728	\$6,284	\$6,659	\$7,047
<b>INTER-GOVERNMENTAL AGENCIES</b>													
Motor Vehicle-in-lieu	\$0	\$703	\$1,304	\$1,343	\$1,383	\$6,175	\$6,360	\$7,558	\$7,785	\$8,019	\$10,278	\$12,477	\$14,798
Gas Tax	\$0	\$162	\$301	\$310	\$320	\$1,426	\$1,469	\$1,746	\$1,799	\$1,853	\$2,375	\$2,883	\$3,419
<b>FEES FOR SERVICES</b>													
Finance	\$0	\$110	\$210	\$216	\$223	\$1,161	\$1,196	\$1,378	\$1,420	\$1,511	\$2,258	\$2,493	\$2,741
Police Protection	\$0	\$121	\$231	\$237	\$245	\$1,275	\$1,313	\$1,513	\$1,559	\$1,659	\$2,479	\$2,737	\$3,009
Fire Protection	\$0	\$4	\$8	\$8	\$9	\$45	\$46	\$53	\$55	\$58	\$87	\$97	\$106
Engineering	\$0	\$22	\$41	\$43	\$44	\$229	\$235	\$271	\$279	\$297	\$445	\$491	\$539
Recreation	\$0	\$225	\$427	\$440	\$453	\$2,359	\$2,430	\$2,801	\$2,885	\$3,070	\$4,589	\$5,067	\$5,570
Senior Center	\$0	\$67	\$125	\$128	\$132	\$591	\$608	\$723	\$745	\$767	\$983	\$1,193	\$1,415
OTHER REVENUE	\$0	\$13	\$24	\$25	\$26	\$134	\$138	\$159	\$164	\$174	\$260	\$287	\$316
COMMUNITY FACILITIES DISTRICT	\$0	\$4,728	\$9,137	\$9,411	\$9,694	\$49,844	\$51,340	\$58,817	\$60,581	\$65,902	\$102,905	\$109,360	\$116,109
<b>TOTAL REVENUE</b>	<b>\$0</b>	<b>\$27,281</b>	<b>\$52,857</b>	<b>\$54,223</b>	<b>\$55,848</b>	<b>\$140,100</b>	<b>\$142,705</b>	<b>\$180,207</b>	<b>\$185,275</b>	<b>\$214,965</b>	<b>\$266,442</b>	<b>\$282,676</b>	<b>\$299,515</b>
<b>EXPENDITURES</b>													
GENERAL GOVERNMENT	\$0	\$869	\$1,656	\$1,709	\$1,764	\$9,213	\$9,509	\$10,985	\$11,339	\$12,093	\$18,112	\$20,041	\$22,076
BUILDING DEPARTMENT													
Public Facilities	\$0	\$374	\$712	\$735	\$759	\$3,963	\$4,091	\$4,725	\$4,878	\$5,202	\$7,791	\$8,621	\$9,497
POLICE DEPARTMENT	\$0	\$2,016	\$3,840	\$3,964	\$4,091	\$21,364	\$22,052	\$25,473	\$26,293	\$28,042	\$42,001	\$46,475	\$51,193
FIRE DEPARTMENT	\$0	\$636	\$1,212	\$1,251	\$1,291	\$6,743	\$6,960	\$8,040	\$8,299	\$8,851	\$13,257	\$14,669	\$16,158
COMMUNITY DEVELOPMENT													
Planning	\$0	\$211	\$402	\$415	\$428	\$2,237	\$2,309	\$2,667	\$2,753	\$2,936	\$4,397	\$4,866	\$5,360
PUBLIC WORKS													
Engineering	\$0	\$34	\$64	\$66	\$68	\$357	\$368	\$425	\$439	\$468	\$701	\$776	\$855
Streets Maintenance	\$0	\$252	\$480	\$496	\$511	\$2,671	\$2,757	\$3,184	\$3,287	\$3,506	\$5,251	\$5,810	\$6,400
Parks Maintenance	\$0	\$279	\$531	\$548	\$566	\$2,953	\$3,048	\$3,521	\$3,635	\$3,876	\$5,806	\$6,424	\$7,077
RECREATION & COMMUNITY SERVICES													
Recreation	\$0	\$473	\$901	\$930	\$960	\$5,011	\$5,172	\$5,974	\$6,167	\$6,577	\$9,851	\$10,900	\$12,007
Community Center	\$0	\$58	\$107	\$111	\$114	\$511	\$527	\$628	\$648	\$669	\$860	\$1,046	\$1,243
Senior Center	\$0	\$48	\$88	\$91	\$94	\$422	\$435	\$518	\$535	\$552	\$709	\$863	\$1,026
<b>TOTAL EXPENDITURES</b>	<b>\$0</b>	<b>\$5,250</b>	<b>\$9,994</b>	<b>\$10,316</b>	<b>\$10,648</b>	<b>\$55,444</b>	<b>\$57,229</b>	<b>\$66,143</b>	<b>\$68,272</b>	<b>\$72,772</b>	<b>\$108,738</b>	<b>\$120,492</b>	<b>\$132,890</b>
<b>NET (COST)/REVENUE</b>	<b>\$0</b>	<b>\$22,031</b>	<b>\$42,863</b>	<b>\$43,907</b>	<b>\$45,200</b>	<b>\$84,657</b>	<b>\$85,476</b>	<b>\$114,065</b>	<b>\$117,003</b>	<b>\$142,193</b>	<b>\$157,704</b>	<b>\$162,184</b>	<b>\$166,625</b>
CUMULATIVE (COST)/REVENUE		\$22,031	\$64,894	\$108,801	\$154,001	\$238,658	\$324,134	\$438,198	\$555,201	\$697,394	\$855,098	\$1,017,282	\$1,183,906
<b>NET PRESENT VALUE</b>													
Redevelopment Tax Increment	\$0	\$8,127	\$15,179	\$15,229	\$15,492	\$69,706	\$69,922	\$79,358	\$74,286	\$76,860	\$105,856	\$111,935	\$119,985

Source: ADE, Inc.



**TABLE A-2 CONT'**  
**INFILL SCENARIO FISCAL IMPACT 2021-2032**

<b>REVENUES</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>2030</b>	<b>2031</b>	<b>2032</b>
<b>TAXES AND FINES</b>												
General Fund Property Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Sales & Use Tax	\$137,554	\$141,680	\$145,931	\$150,309	\$154,818	\$159,463	\$164,246	\$169,174	\$174,249	\$179,477	\$184,861	\$190,407
Franchise Fees	\$9,338	\$11,566	\$11,913	\$12,270	\$12,638	\$13,018	\$15,666	\$16,136	\$16,620	\$17,119	\$17,633	\$18,161
Real Property Tsf. Tax	\$1,300	\$1,328	\$1,527	\$1,558	\$1,594	\$1,630	\$1,667	\$1,873	\$1,911	\$1,955	\$2,000	\$2,045
Transient Occupancy Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>USE OF MONEY OR PROPERTY:</b>												
Investment Income	\$7,235	\$7,635	\$7,870	\$8,106	\$8,349	\$8,599	\$9,068	\$9,347	\$9,626	\$9,915	\$10,212	\$10,517
<b>INTER-GOVERNMENTAL AGENCIES</b>												
Motor Vehicle-in-lieu	\$15,242	\$15,700	\$16,171	\$16,656	\$17,155	\$17,670	\$18,200	\$18,746	\$19,309	\$19,888	\$20,485	\$21,099
Gas Tax	\$3,521	\$3,627	\$3,736	\$3,848	\$3,963	\$4,082	\$4,205	\$4,331	\$4,461	\$4,595	\$4,732	\$4,874
<b>FEES FOR SERVICES</b>												
Finance	\$2,823	\$3,496	\$3,601	\$3,709	\$3,821	\$3,935	\$4,736	\$4,878	\$5,024	\$5,175	\$5,330	\$5,490
Police Protection	\$3,099	\$3,839	\$3,954	\$4,072	\$4,195	\$4,320	\$5,200	\$5,355	\$5,516	\$5,682	\$5,852	\$6,028
Fire Protection	\$109	\$135	\$139	\$144	\$148	\$152	\$183	\$189	\$194	\$200	\$206	\$213
Engineering	\$556	\$688	\$709	\$730	\$752	\$775	\$932	\$960	\$989	\$1,019	\$1,049	\$1,081
Recreation	\$5,737	\$7,105	\$7,319	\$7,538	\$7,764	\$7,997	\$9,624	\$9,913	\$10,211	\$10,517	\$10,832	\$11,157
Senior Center	\$1,458	\$1,502	\$1,547	\$1,593	\$1,641	\$1,690	\$1,741	\$1,793	\$1,847	\$1,902	\$1,959	\$2,018
<b>OTHER REVENUE</b>	\$325	\$403	\$415	\$427	\$440	\$453	\$546	\$562	\$579	\$596	\$614	\$632
<b>COMMUNITY FACILITIES DIST.</b>	\$119,593	\$158,554	\$163,311	\$168,210	\$173,257	\$178,454	\$224,816	\$231,561	\$238,508	\$245,663	\$253,033	\$260,624
<b>TOTAL REVENUE</b>	<b>\$307,890</b>	<b>\$357,259</b>	<b>\$368,142</b>	<b>\$379,171</b>	<b>\$390,535</b>	<b>\$402,239</b>	<b>\$460,831</b>	<b>\$474,818</b>	<b>\$489,044</b>	<b>\$503,701</b>	<b>\$518,798</b>	<b>\$534,346</b>
<b>EXPENDITURES</b>												
<b>GENERAL GOVERNMENT</b>	\$22,787	\$28,284	\$29,195	\$30,135	\$31,105	\$32,107	\$38,722	\$39,969	\$41,256	\$42,584	\$43,955	\$45,371
<b>BUILDING DEPARTMENT</b>												
Public Facilities	\$9,802	\$12,167	\$12,559	\$12,963	\$13,381	\$13,811	\$16,657	\$17,193	\$17,747	\$18,319	\$18,908	\$19,517
<b>POLICE DEPARTMENT</b>	\$52,841	\$65,589	\$67,701	\$69,881	\$72,131	\$74,453	\$89,793	\$92,685	\$95,669	\$98,750	\$101,929	\$105,211
<b>FIRE DEPARTMENT</b>	\$16,679	\$20,702	\$21,369	\$22,057	\$22,767	\$23,500	\$28,342	\$29,255	\$30,197	\$31,169	\$32,173	\$33,209
<b>COMMUNITY DEVELOPMENT</b>												
Planning	\$5,532	\$6,867	\$7,088	\$7,316	\$7,552	\$7,795	\$9,401	\$9,704	\$10,016	\$10,339	\$10,672	\$11,015
<b>PUBLIC WORKS</b>												
Engineering	\$882	\$1,095	\$1,130	\$1,167	\$1,204	\$1,243	\$1,499	\$1,547	\$1,597	\$1,649	\$1,702	\$1,757
Streets Maintenance	\$6,606	\$8,199	\$8,463	\$8,736	\$9,017	\$9,308	\$11,225	\$11,587	\$11,960	\$12,345	\$12,742	\$13,153
Parks Maintenance	\$7,305	\$9,067	\$9,359	\$9,660	\$9,971	\$10,292	\$12,413	\$12,812	\$13,225	\$13,651	\$14,090	\$14,544
<b>RECREATION &amp; COMMUNITY SERVICES</b>												
Recreation	\$12,393	\$15,383	\$15,878	\$16,390	\$16,918	\$17,462	\$21,060	\$21,738	\$22,438	\$23,161	\$23,906	\$24,676
Community Center	\$1,283	\$1,325	\$1,367	\$1,411	\$1,457	\$1,504	\$1,552	\$1,602	\$1,654	\$1,707	\$1,762	\$1,818
Senior Center	\$1,059	\$1,093	\$1,128	\$1,165	\$1,202	\$1,241	\$1,281	\$1,322	\$1,364	\$1,408	\$1,454	\$1,501
<b>TOTAL EXPENDITURES</b>	<b>\$137,169</b>	<b>\$169,770</b>	<b>\$175,237</b>	<b>\$180,880</b>	<b>\$186,704</b>	<b>\$192,716</b>	<b>\$231,945</b>	<b>\$239,413</b>	<b>\$247,123</b>	<b>\$255,080</b>	<b>\$263,293</b>	<b>\$271,772</b>
<b>NET (COST)/REVENUE</b>	<b>\$170,721</b>	<b>\$187,489</b>	<b>\$192,905</b>	<b>\$198,291</b>	<b>\$203,831</b>	<b>\$209,523</b>	<b>\$228,886</b>	<b>\$235,404</b>	<b>\$241,922</b>	<b>\$248,622</b>	<b>\$255,504</b>	<b>\$262,575</b>
<b>CUMULATIVE (COST)/REVENUE</b>	<b>\$1,354,627</b>	<b>\$1,542,116</b>	<b>\$1,735,021</b>	<b>\$1,933,312</b>	<b>\$2,137,143</b>	<b>\$2,346,666</b>	<b>\$2,575,552</b>	<b>\$2,810,956</b>	<b>\$3,052,878</b>	<b>\$3,301,500</b>	<b>\$3,557,004</b>	<b>\$3,819,579</b>
<b>NET PRESENT VALUE</b>												\$1,079,187
Redevelopment Tax Increment	\$119,553	\$139,793	\$139,051	\$138,145	\$137,104	\$134,632	\$150,989	\$145,660	\$143,622	\$141,377	\$135,054	\$128,312

Source: ADE, Inc.

**TABLE A-3  
DEVELOPMENT PHASING FOR RESIDENTIAL CONVERSION SCENARIO**

<b>ANNUAL</b>	<b>Buildout</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
<b>Units - Annual</b>													
<b>Single Family</b>	0	0	0	0	0	0	0	0	0	0	0	0	0
Multi-family	244	0	8	6	0	0	48	0	12	0	0	19	19
<b>Sq.Ft. - Annual</b>													
Office	178,052	0	0	0	0	0	44,513	0	0	0	0	44,513	0
Retail	24,928	0	5,200	4,700	0	0	5,700	0	5,190	0	4,138	0	0
R&D/Flex	0	0	0	0	0	0	0	0	0	0	0	0	0
Service/Commercial	0	0	0	0	0	0	0	0	0	0	0	0	0
	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>2030</b>	<b>2031</b>	<b>2032</b>
<b>Units - Annual</b>													
Single Family	0	0	0	0	0	0	0	0	0	0	0	0	0
Multi-family	19	0	19	19	19	19	20	20	0	0	0	0	0
<b>Sq.Ft. - Annual</b>													
Office	0	0	44,513	0	0	0	0	44,513	0	0	0	0	0
Retail	0	0	0	0	0	0	0	0	0	0	0	0	0
R&D/Flex	0	0	0	0	0	0	0	0	0	0	0	0	0
Service/Commercial	0	0	0	0	0	0	0	0	0	0	0	0	0

Source: ADE, Inc.

**TABLE A-4  
RESIDENTIAL CONVERSION SCENARIO FISCAL IMPACT 2008-2020**

<b>REVENUES</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>
<b>TAXES AND FINES</b>													
General Fund Property Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Sales & Use Tax	\$0	\$19,708	\$38,603	\$39,761	\$40,954	\$68,759	\$70,822	\$96,720	\$99,622	\$122,074	\$126,987	\$132,085	\$137,374
Franchise Fees	\$0	\$479	\$905	\$932	\$960	\$5,232	\$5,389	\$6,351	\$6,542	\$6,899	\$10,243	\$11,581	\$12,989
Real Property Tsf. Tax	\$0	\$466	\$466	\$169	\$172	\$3,033	\$834	\$1,584	\$993	\$1,012	\$2,174	\$2,569	\$2,759
Transient Occupancy Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>USE OF MONEY OR PROPERTY:</b>													
Investment Income	\$0	\$909	\$1,753	\$1,794	\$1,847	\$3,877	\$3,902	\$5,183	\$5,313	\$6,265	\$7,024	\$7,583	\$8,160
<b>INTER-GOVERNMENTAL AGENCIES</b>													
Motor Vehicle-in-lieu	\$0	\$1,090	\$2,021	\$2,082	\$2,144	\$9,729	\$10,021	\$12,404	\$12,776	\$13,160	\$16,968	\$20,993	\$25,245
Gas Tax	\$0	\$252	\$467	\$481	\$495	\$2,248	\$2,315	\$2,866	\$2,952	\$3,040	\$3,920	\$4,850	\$5,832
<b>FEES FOR SERVICES</b>													
Finance	\$0	\$145	\$274	\$282	\$290	\$1,582	\$1,629	\$1,920	\$1,978	\$2,085	\$3,096	\$3,501	\$3,927
Police Protection	\$0	\$159	\$300	\$309	\$319	\$1,737	\$1,789	\$2,108	\$2,171	\$2,290	\$3,400	\$3,844	\$4,311
Fire Protection	\$0	\$6	\$11	\$11	\$11	\$61	\$63	\$74	\$77	\$81	\$120	\$136	\$152
Engineering	\$0	\$28	\$54	\$55	\$57	\$311	\$321	\$378	\$389	\$411	\$610	\$689	\$773
Recreation	\$0	\$294	\$556	\$573	\$590	\$3,214	\$3,311	\$3,902	\$4,019	\$4,238	\$6,293	\$7,115	\$7,980
Senior Center	\$0	\$104	\$193	\$199	\$205	\$931	\$958	\$1,186	\$1,222	\$1,259	\$1,623	\$2,008	\$2,415
OTHER REVENUE	\$0	\$17	\$32	\$32	\$33	\$182	\$188	\$221	\$228	\$240	\$357	\$403	\$452
<b>COMMUNITY FACILITIES</b>													
DISTRICT	\$0	\$5,417	\$10,415	\$10,727	\$11,049	\$62,545	\$64,421	\$74,205	\$76,432	\$82,227	\$129,588	\$139,740	\$150,384
<b>TOTAL REVENUE</b>	<b>\$0</b>	<b>\$29,074</b>	<b>\$56,049</b>	<b>\$57,408</b>	<b>\$59,128</b>	<b>\$163,441</b>	<b>\$165,962</b>	<b>\$209,103</b>	<b>\$214,712</b>	<b>\$245,282</b>	<b>\$312,403</b>	<b>\$337,096</b>	<b>\$362,753</b>
<b>EXPENDITURES</b>													
GENERAL GOVERNMENT	\$0	\$1,139	\$2,157	\$2,226	\$2,298	\$12,552	\$12,956	\$15,302	\$15,794	\$16,692	\$24,836	\$28,139	\$31,629
<b>BUILDING DEPARTMENT</b>													
Public Facilities	\$0	\$490	\$928	\$958	\$989	\$5,400	\$5,574	\$6,582	\$6,794	\$7,180	\$10,684	\$12,105	\$13,606
POLICE DEPARTMENT	\$0	\$2,641	\$5,002	\$5,163	\$5,329	\$29,108	\$30,045	\$35,483	\$36,626	\$38,707	\$57,594	\$65,253	\$73,347
FIRE DEPARTMENT	\$0	\$834	\$1,579	\$1,630	\$1,682	\$9,188	\$9,483	\$11,200	\$11,561	\$12,217	\$18,179	\$20,596	\$23,151
<b>COMMUNITY DEVELOPMENT</b>													
Planning	\$0	\$277	\$524	\$541	\$558	\$3,047	\$3,146	\$3,715	\$3,835	\$4,052	\$6,030	\$6,832	\$7,679
<b>PUBLIC WORKS</b>													
Engineering	\$0	\$44	\$84	\$86	\$89	\$486	\$502	\$592	\$611	\$646	\$962	\$1,089	\$1,225
Streets Maintenance	\$0	\$330	\$625	\$645	\$666	\$3,639	\$3,756	\$4,436	\$4,579	\$4,839	\$7,200	\$8,157	\$9,169
Parks Maintenance	\$0	\$365	\$691	\$714	\$737	\$4,024	\$4,153	\$4,905	\$5,063	\$5,351	\$7,961	\$9,020	\$10,139
<b>RECREATION &amp; COMMUNITY SERVICES</b>													
Recreation	\$0	\$619	\$1,173	\$1,211	\$1,250	\$6,827	\$7,047	\$8,322	\$8,590	\$9,078	\$13,508	\$15,305	\$17,203
Community Center	\$0	\$89	\$166	\$172	\$177	\$805	\$831	\$1,031	\$1,064	\$1,098	\$1,419	\$1,760	\$2,121
Senior Center	\$0	\$74	\$137	\$142	\$146	\$664	\$686	\$851	\$878	\$906	\$1,171	\$1,452	\$1,750
<b>TOTAL EXPENDITURES</b>	<b>\$0</b>	<b>\$6,903</b>	<b>\$13,065</b>	<b>\$13,486</b>	<b>\$13,920</b>	<b>\$75,740</b>	<b>\$78,179</b>	<b>\$92,420</b>	<b>\$95,396</b>	<b>\$100,768</b>	<b>\$149,545</b>	<b>\$169,710</b>	<b>\$191,018</b>
<b>NET (COST)/REVENUE</b>	<b>\$0</b>	<b>\$22,171</b>	<b>\$42,984</b>	<b>\$43,922</b>	<b>\$45,207</b>	<b>\$87,701</b>	<b>\$87,783</b>	<b>\$116,684</b>	<b>\$119,317</b>	<b>\$144,513</b>	<b>\$162,859</b>	<b>\$167,386</b>	<b>\$171,734</b>
<b>CUMULATIVE (COST)/REVENUE</b>													
NET PRESENT VALUE		\$22,171	\$65,155	\$109,077	\$154,285	\$241,986	\$329,769	\$446,453	\$565,770	\$710,283	\$873,141	\$1,040,528	\$1,212,262
Redevelopment Tax Increment	\$0	\$9,859	\$18,326	\$18,391	\$18,711	\$89,822	\$90,119	\$103,966	\$97,340	\$99,892	\$137,963	\$148,497	\$161,631

Source: ADE, Inc.

**TABLE A-4 CONT'**  
**RESIDENTIAL CONVERSION SCENARIO FISCAL IMPACT 2021-2032**

<b>REVENUES</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>2030</b>	<b>2031</b>	<b>2032</b>
<b>TAXES AND FINES</b>												
General Fund Property Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Sales & Use Tax	\$141,495	\$147,148	\$153,012	\$159,095	\$165,406	\$172,084	\$179,014	\$184,385	\$189,916	\$195,614	\$201,482	\$207,527
Franchise Fees	\$13,379	\$17,312	\$18,990	\$20,754	\$22,607	\$24,658	\$29,600	\$30,488	\$31,403	\$32,345	\$33,315	\$34,315
Real Property Tsf. Tax	\$1,839	\$2,997	\$3,412	\$3,621	\$3,840	\$4,157	\$4,400	\$3,643	\$3,719	\$3,806	\$3,894	\$3,984
Transient Occupancy Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>USE OF MONEY OR PROPERTY:</b>												
Investment Income	\$8,365	\$9,252	\$9,919	\$10,609	\$11,332	\$12,126	\$13,216	\$13,577	\$13,983	\$14,401	\$14,832	\$15,276
<b>INTER-GOVERNMENTAL AGENCIES</b>												
Motor Vehicle-in-lieu	\$26,002	\$30,625	\$35,501	\$40,642	\$46,060	\$52,127	\$58,516	\$60,272	\$62,080	\$63,942	\$65,860	\$67,836
Gas Tax	\$6,007	\$7,075	\$8,202	\$9,390	\$10,641	\$12,043	\$13,519	\$13,924	\$14,342	\$14,772	\$15,216	\$15,672
<b>FEES FOR SERVICES</b>												
Finance	\$4,044	\$5,233	\$5,741	\$6,274	\$6,834	\$7,454	\$8,948	\$9,216	\$9,493	\$9,778	\$10,071	\$10,373
Police Protection	\$4,440	\$5,746	\$6,303	\$6,888	\$7,503	\$8,184	\$9,824	\$10,119	\$10,422	\$10,735	\$11,057	\$11,389
Fire Protection	\$157	\$203	\$222	\$243	\$265	\$289	\$346	\$357	\$367	\$379	\$390	\$402
Engineering	\$796	\$1,030	\$1,130	\$1,235	\$1,345	\$1,467	\$1,761	\$1,814	\$1,869	\$1,925	\$1,982	\$2,042
Recreation	\$8,219	\$10,635	\$11,667	\$12,750	\$13,889	\$15,148	\$18,185	\$18,730	\$19,292	\$19,871	\$20,467	\$21,081
Senior Center	\$2,487	\$2,929	\$3,396	\$3,887	\$4,405	\$4,986	\$5,597	\$5,765	\$5,938	\$6,116	\$6,299	\$6,488
<b>OTHER REVENUE</b>	\$466	\$603	\$661	\$723	\$787	\$859	\$1,031	\$1,062	\$1,094	\$1,126	\$1,160	\$1,195
<b>COMMUNITY FACILITIES</b>												
DISTRICT	\$154,895	\$210,071	\$223,423	\$237,387	\$251,989	\$267,894	\$335,169	\$345,224	\$355,580	\$366,248	\$377,235	\$388,552
<b>TOTAL REVENUE</b>	<b>\$372,593</b>	<b>\$450,857</b>	<b>\$481,578</b>	<b>\$513,500</b>	<b>\$546,903</b>	<b>\$583,476</b>	<b>\$679,126</b>	<b>\$698,576</b>	<b>\$719,498</b>	<b>\$741,057</b>	<b>\$763,262</b>	<b>\$786,132</b>
<b>EXPENDITURES</b>												
GENERAL GOVERNMENT	\$32,648	\$42,334	\$46,539	\$50,971	\$55,640	\$60,817	\$73,162	\$75,518	\$77,949	\$80,459	\$83,050	\$85,724
BUILDING DEPARTMENT												
Public Facilities	\$14,044	\$18,211	\$20,020	\$21,926	\$23,935	\$26,162	\$31,472	\$32,486	\$33,532	\$34,611	\$35,726	\$36,876
POLICE DEPARTMENT	\$75,708	\$98,171	\$107,921	\$118,198	\$129,025	\$141,030	\$169,658	\$175,121	\$180,760	\$186,580	\$192,588	\$198,789
FIRE DEPARTMENT	\$23,896	\$30,986	\$34,064	\$37,308	\$40,725	\$44,514	\$53,550	\$55,275	\$57,054	\$58,892	\$60,788	\$62,745
COMMUNITY DEVELOPMENT												
Planning	\$7,926	\$10,278	\$11,299	\$12,375	\$13,508	\$14,765	\$17,762	\$18,334	\$18,925	\$19,534	\$20,163	\$20,812
PUBLIC WORKS												
Engineering	\$1,264	\$1,639	\$1,802	\$1,973	\$2,154	\$2,355	\$2,832	\$2,924	\$3,018	\$3,115	\$3,215	\$3,319
Streets Maintenance	\$9,464	\$12,273	\$13,492	\$14,776	\$16,130	\$17,631	\$21,209	\$21,892	\$22,597	\$23,325	\$24,076	\$24,851
Parks Maintenance	\$10,466	\$13,571	\$14,918	\$16,339	\$17,836	\$19,495	\$23,453	\$24,208	\$24,987	\$25,792	\$26,622	\$27,480
RECREATION & COMMUNITY SERVICES												
Recreation	\$17,757	\$23,025	\$25,312	\$27,722	\$30,261	\$33,077	\$39,791	\$41,073	\$42,395	\$43,760	\$45,170	\$46,624
Community Center	\$2,189	\$2,584	\$3,002	\$3,444	\$3,911	\$4,436	\$4,990	\$5,151	\$5,316	\$5,488	\$5,664	\$5,847
Senior Center	\$1,806	\$2,132	\$2,477	\$2,842	\$3,227	\$3,660	\$4,118	\$4,250	\$4,387	\$4,528	\$4,674	\$4,825
<b>TOTAL EXPENDITURES</b>	<b>\$197,169</b>	<b>\$255,203</b>	<b>\$280,845</b>	<b>\$307,874</b>	<b>\$336,352</b>	<b>\$367,942</b>	<b>\$441,998</b>	<b>\$456,230</b>	<b>\$470,921</b>	<b>\$486,084</b>	<b>\$501,736</b>	<b>\$517,892</b>
<b>NET (COST)/REVENUE</b>	<b>\$175,424</b>	<b>\$195,654</b>	<b>\$200,733</b>	<b>\$205,626</b>	<b>\$210,551</b>	<b>\$215,534</b>	<b>\$237,129</b>	<b>\$242,346</b>	<b>\$248,578</b>	<b>\$254,973</b>	<b>\$261,526</b>	<b>\$268,239</b>
<b>CUMULATIVE (COST)/REVENUE</b>	<b>\$1,387,686</b>	<b>\$1,583,339</b>	<b>\$1,784,073</b>	<b>\$1,989,698</b>	<b>\$2,200,250</b>	<b>\$2,415,784</b>	<b>\$2,652,913</b>	<b>\$2,895,258</b>	<b>\$3,143,836</b>	<b>\$3,398,809</b>	<b>\$3,660,335</b>	<b>\$3,928,574</b>
<b>NET PRESENT VALUE</b>												
\$1,905,209												
Redevelopment Tax Increment	\$161,080	\$196,237	\$205,182	\$213,566	\$221,405	\$227,250	\$256,366	\$247,428	\$244,061	\$240,339	\$229,679	\$218,300

Source: ADE, Inc.

**TABLE A-5  
DEVELOPMENT PHASING FOR R&D/FLEX CONVERSION SCENARIO**

<b>ANNUAL</b>	<b>Buildout</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
<b>Units - Annual</b>													
<b>Single Family</b>	0	0	0	0	0	0	0	0	0	0	0	0	0
Multi-family	76	0	5	4	0	0	30	0	6	0	0	11	10
<b>Sq.Ft. - Annual</b>													
Office	144,184	0	0	0	0	0	38,342	0	0	0	0	38,342	0
Retail	24,928	0	5,200	4,700	0	0	5,000	0	9,801	0	4,138	0	0
R&D/Flex	67,082	0	0	0	0	0	0	0	0	0	0	0	0
Service/Commercial	0	0	0	0	0	0	0	0	0	0	0	0	0
	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>2030</b>	<b>2031</b>	<b>2032</b>
<b>Units - Annual</b>													
Single Family	0	0	0	0	0	0	0	0	0	0	0	0	0
Multi-family	10	0	0	0	0	0	0	0	0	0	0	0	0
<b>Sq.Ft. - Annual</b>													
Office	0	0	0	0	0	0	0	0	0	0	0	0	0
Retail	0	0	0	0	0	0	0	0	0	0	0	0	0
R&D/Flex	0	0	0	0	0	8,385	8,385	8,385	8,385	8,385	8,385	8,385	8,385
Service/Commercial	0	0	0	0	0	0	0	0	0	0	0	0	0

Source: ADE, Inc.

**TABLE A-6  
R&D/FLEX CONVERSION SCENARIO FISCAL IMPACT 2008-2020**

<b>REVENUES</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>
<b>TAXES AND FINES</b>													
General Fund Property Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Sales & Use Tax	\$0	\$19,566	\$38,341	\$39,491	\$40,676	\$67,457	\$69,481	\$94,945	\$97,794	\$120,191	\$124,537	\$128,965	\$133,547
Franchise Fees	\$0	\$366	\$695	\$716	\$737	\$3,840	\$3,956	\$4,560	\$4,696	\$4,998	\$7,470	\$8,248	\$9,066
Real Property Tsf. Tax	\$0	\$327	\$333	\$132	\$134	\$2,097	\$623	\$1,018	\$723	\$738	\$1,493	\$1,718	\$1,832
Transient Occupancy Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>USE OF MONEY OR PROPERTY:</b>													
Investment Income	\$0	\$867	\$1,680	\$1,722	\$1,773	\$3,468	\$3,511	\$4,664	\$4,791	\$5,728	\$6,284	\$6,659	\$7,047
<b>INTER-GOVERNMENTAL AGENCIES</b>													
Motor Vehicle-in-lieu	\$0	\$703	\$1,304	\$1,343	\$1,383	\$6,175	\$6,360	\$7,558	\$7,785	\$8,019	\$10,278	\$12,477	\$14,798
Gas Tax	\$0	\$162	\$301	\$310	\$320	\$1,426	\$1,469	\$1,746	\$1,799	\$1,853	\$2,375	\$2,883	\$3,419
<b>FEES FOR SERVICES</b>													
Finance	\$0	\$110	\$210	\$216	\$223	\$1,161	\$1,196	\$1,378	\$1,420	\$1,511	\$2,258	\$2,493	\$2,741
Police Protection	\$0	\$121	\$231	\$237	\$245	\$1,275	\$1,313	\$1,513	\$1,559	\$1,659	\$2,479	\$2,737	\$3,009
Fire Protection	\$0	\$4	\$8	\$8	\$9	\$45	\$46	\$53	\$55	\$58	\$87	\$97	\$106
Engineering	\$0	\$22	\$41	\$43	\$44	\$229	\$235	\$271	\$279	\$297	\$445	\$491	\$539
Recreation	\$0	\$225	\$427	\$440	\$453	\$2,359	\$2,430	\$2,801	\$2,885	\$3,070	\$4,589	\$5,067	\$5,570
Senior Center	\$0	\$67	\$125	\$128	\$132	\$591	\$608	\$723	\$745	\$767	\$983	\$1,193	\$1,415
<b>OTHER REVENUE</b>	\$0	\$13	\$24	\$25	\$26	\$134	\$138	\$159	\$164	\$174	\$260	\$287	\$316
<b>COMMUNITY FACILITIES DISTRICT</b>	\$0	\$4,728	\$9,137	\$9,411	\$9,694	\$49,844	\$51,340	\$58,817	\$60,581	\$65,902	\$102,905	\$109,360	\$116,109
<b>TOTAL REVENUE</b>	<b>\$0</b>	<b>\$27,281</b>	<b>\$52,857</b>	<b>\$54,223</b>	<b>\$55,848</b>	<b>\$140,100</b>	<b>\$142,705</b>	<b>\$180,207</b>	<b>\$185,275</b>	<b>\$214,965</b>	<b>\$266,442</b>	<b>\$282,676</b>	<b>\$299,515</b>
<b>EXPENDITURES</b>													
<b>GENERAL GOVERNMENT</b>	\$0	\$869	\$1,656	\$1,709	\$1,764	\$9,213	\$9,509	\$10,985	\$11,339	\$12,093	\$18,112	\$20,041	\$22,076
<b>BUILDING DEPARTMENT</b>													
Public Facilities	\$0	\$374	\$712	\$735	\$759	\$3,963	\$4,091	\$4,725	\$4,878	\$5,202	\$7,791	\$8,621	\$9,497
<b>POLICE DEPARTMENT</b>	\$0	\$2,016	\$3,840	\$3,964	\$4,091	\$21,364	\$22,052	\$25,473	\$26,293	\$28,042	\$42,001	\$46,475	\$51,193
<b>FIRE DEPARTMENT</b>	\$0	\$636	\$1,212	\$1,251	\$1,291	\$6,743	\$6,960	\$8,040	\$8,299	\$8,851	\$13,257	\$14,669	\$16,158
<b>COMMUNITY DEVELOPMENT</b>													
Planning	\$0	\$211	\$402	\$415	\$428	\$2,237	\$2,309	\$2,667	\$2,753	\$2,936	\$4,397	\$4,866	\$5,360
<b>PUBLIC WORKS</b>													
Engineering	\$0	\$34	\$64	\$66	\$68	\$357	\$368	\$425	\$439	\$468	\$701	\$776	\$855
Streets Maintenance	\$0	\$252	\$480	\$496	\$511	\$2,671	\$2,757	\$3,184	\$3,287	\$3,506	\$5,251	\$5,810	\$6,400
Parks Maintenance	\$0	\$279	\$531	\$548	\$566	\$2,953	\$3,048	\$3,521	\$3,635	\$3,876	\$5,806	\$6,424	\$7,077
<b>RECREATION &amp; COMMUNITY SERVICES</b>													
Recreation	\$0	\$473	\$901	\$930	\$960	\$5,011	\$5,172	\$5,974	\$6,167	\$6,577	\$9,851	\$10,900	\$12,007
Community Center	\$0	\$58	\$107	\$111	\$114	\$511	\$527	\$628	\$648	\$669	\$860	\$1,046	\$1,243
Senior Center	\$0	\$48	\$88	\$91	\$94	\$422	\$435	\$518	\$535	\$552	\$709	\$863	\$1,026
<b>TOTAL EXPENDITURES</b>	<b>\$0</b>	<b>\$5,250</b>	<b>\$9,994</b>	<b>\$10,316</b>	<b>\$10,648</b>	<b>\$55,444</b>	<b>\$57,229</b>	<b>\$66,143</b>	<b>\$68,272</b>	<b>\$72,772</b>	<b>\$108,738</b>	<b>\$120,492</b>	<b>\$132,890</b>
<b>NET (COST)/REVENUE</b>	<b>\$0</b>	<b>\$22,031</b>	<b>\$42,863</b>	<b>\$43,907</b>	<b>\$45,200</b>	<b>\$84,657</b>	<b>\$85,476</b>	<b>\$114,065</b>	<b>\$117,003</b>	<b>\$142,193</b>	<b>\$157,704</b>	<b>\$162,184</b>	<b>\$166,625</b>
<b>CUMULATIVE (COST)/REVENUE</b>		\$22,031	\$64,894	\$108,801	\$154,001	\$238,658	\$324,134	\$438,198	\$555,201	\$697,394	\$855,098	\$1,017,282	\$1,183,906
<b>NET PRESENT VALUE</b>													
Redevelopment Tax Increment	\$0	\$8,127	\$15,179	\$15,229	\$15,492	\$69,706	\$69,922	\$79,358	\$74,286	\$76,860	\$105,856	\$111,935	\$119,985

Source: ADE, Inc.

**TABLE A-6 CONT'**  
**ACCESS SCENARIO FISCAL IMPACT 2021-2032**

<b>REVENUES</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>2030</b>	<b>2031</b>	<b>2032</b>
<b>TAXES AND FINES</b>												
General Fund Property Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Sales & Use Tax	\$137,554	\$141,680	\$145,931	\$150,309	\$164,081	\$178,545	\$193,729	\$209,663	\$226,379	\$243,909	\$262,287	\$281,548
Franchise Fees	\$9,338	\$11,566	\$11,913	\$12,270	\$13,202	\$14,179	\$17,461	\$18,601	\$19,794	\$21,042	\$22,346	\$23,710
Real Property Tsf. Tax	\$1,300	\$1,328	\$1,527	\$1,558	\$1,594	\$1,659	\$1,725	\$1,960	\$2,029	\$2,103	\$2,179	\$2,257
Transient Occupancy Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>USE OF MONEY OR PROPERTY:</b>												
Investment Income	\$7,235	\$7,635	\$7,870	\$8,106	\$8,772	\$9,472	\$10,418	\$11,200	\$12,013	\$12,864	\$13,756	\$14,690
<b>INTER-GOVERNMENTAL AGENCIES</b>												
Motor Vehicle-in-lieu	\$15,242	\$15,700	\$16,171	\$16,656	\$17,155	\$17,670	\$18,200	\$18,746	\$19,309	\$19,888	\$20,485	\$21,099
Gas Tax	\$3,521	\$3,627	\$3,736	\$3,848	\$3,963	\$4,082	\$4,205	\$4,331	\$4,461	\$4,595	\$4,732	\$4,874
<b>FEES FOR SERVICES</b>												
Finance	\$2,823	\$3,496	\$3,601	\$3,709	\$3,991	\$4,286	\$5,278	\$5,623	\$5,984	\$6,361	\$6,755	\$7,167
Police Protection	\$3,099	\$3,839	\$3,954	\$4,072	\$4,382	\$4,706	\$5,795	\$6,174	\$6,569	\$6,984	\$7,417	\$7,869
Fire Protection	\$109	\$135	\$139	\$144	\$154	\$166	\$204	\$218	\$232	\$246	\$261	\$277
Engineering	\$556	\$688	\$709	\$730	\$786	\$844	\$1,039	\$1,107	\$1,178	\$1,252	\$1,330	\$1,411
Recreation	\$5,737	\$7,105	\$7,319	\$7,538	\$8,111	\$8,711	\$10,727	\$11,427	\$12,160	\$12,927	\$13,728	\$14,566
Senior Center	\$1,458	\$1,502	\$1,547	\$1,593	\$1,641	\$1,690	\$1,741	\$1,793	\$1,847	\$1,902	\$1,959	\$2,018
<b>OTHER REVENUE</b>	\$325	\$403	\$415	\$427	\$460	\$494	\$608	\$648	\$689	\$733	\$778	\$826
<b>COMMUNITY FACILITIES</b>												
<b>DISTRICT</b>	\$119,593	\$158,554	\$163,311	\$168,210	\$182,249	\$196,978	\$253,435	\$270,864	\$289,111	\$308,209	\$328,192	\$349,097
<b>TOTAL REVENUE</b>	<b>\$307,890</b>	<b>\$357,259</b>	<b>\$368,142</b>	<b>\$379,171</b>	<b>\$410,541</b>	<b>\$443,482</b>	<b>\$524,566</b>	<b>\$562,355</b>	<b>\$601,753</b>	<b>\$643,013</b>	<b>\$686,205</b>	<b>\$731,410</b>
<b>EXPENDITURES</b>												
<b>GENERAL GOVERNMENT</b>	\$22,787	\$28,284	\$29,195	\$30,135	\$32,493	\$34,972	\$43,158	\$46,074	\$49,133	\$52,342	\$55,706	\$59,232
<b>BUILDING DEPARTMENT</b>												
Public Facilities	\$9,802	\$12,167	\$12,559	\$12,963	\$13,978	\$15,044	\$18,565	\$19,820	\$21,136	\$22,516	\$23,963	\$25,480
<b>POLICE DEPARTMENT</b>	\$52,841	\$65,589	\$67,701	\$69,881	\$75,349	\$81,098	\$100,081	\$106,843	\$113,937	\$121,377	\$129,178	\$137,355
<b>FIRE DEPARTMENT</b>	\$16,679	\$20,702	\$21,369	\$22,057	\$23,783	\$25,597	\$31,589	\$33,724	\$35,963	\$38,311	\$40,773	\$43,354
<b>COMMUNITY DEVELOPMENT</b>												
Planning	\$5,532	\$6,867	\$7,088	\$7,316	\$7,889	\$8,491	\$10,478	\$11,186	\$11,929	\$12,708	\$13,524	\$14,380
<b>PUBLIC WORKS</b>												
Engineering	\$882	\$1,095	\$1,130	\$1,167	\$1,258	\$1,354	\$1,671	\$1,784	\$1,902	\$2,026	\$2,157	\$2,293
Streets Maintenance	\$6,606	\$8,199	\$8,463	\$8,736	\$9,420	\$10,138	\$12,511	\$13,357	\$14,244	\$15,174	\$16,149	\$17,171
Parks Maintenance	\$7,305	\$9,067	\$9,359	\$9,660	\$10,416	\$11,211	\$13,835	\$14,769	\$15,750	\$16,779	\$17,857	\$18,987
<b>RECREATION &amp; COMMUNITY SERVICES</b>												
Recreation	\$12,393	\$15,383	\$15,878	\$16,390	\$17,672	\$19,021	\$23,473	\$25,059	\$26,723	\$28,468	\$30,297	\$32,215
Community Center	\$1,283	\$1,325	\$1,367	\$1,411	\$1,457	\$1,504	\$1,552	\$1,602	\$1,654	\$1,707	\$1,762	\$1,818
Senior Center	\$1,059	\$1,093	\$1,128	\$1,165	\$1,202	\$1,241	\$1,281	\$1,322	\$1,364	\$1,408	\$1,454	\$1,501
<b>TOTAL EXPENDITURES</b>	<b>\$137,169</b>	<b>\$169,770</b>	<b>\$175,237</b>	<b>\$180,880</b>	<b>\$194,916</b>	<b>\$209,669</b>	<b>\$258,194</b>	<b>\$275,539</b>	<b>\$293,734</b>	<b>\$312,814</b>	<b>\$332,819</b>	<b>\$353,788</b>
<b>NET (COST)/REVENUE</b>	<b>\$170,721</b>	<b>\$187,489</b>	<b>\$192,905</b>	<b>\$198,291</b>	<b>\$215,625</b>	<b>\$233,813</b>	<b>\$266,372</b>	<b>\$286,816</b>	<b>\$308,020</b>	<b>\$330,199</b>	<b>\$353,386</b>	<b>\$377,622</b>
<b>CUMULATIVE (COST)/REVENUE</b>	\$1,354,627	\$1,542,116	\$1,735,021	\$1,933,312	\$2,148,937	\$2,382,750	\$2,649,121	\$2,935,937	\$3,243,957	\$3,574,155	\$3,927,542	\$4,305,163
<b>NET PRESENT VALUE</b>												\$1,147,580
Redevelopment Tax Increment	\$119,553	\$139,793	\$139,051	\$138,145	\$140,383	\$141,004	\$160,346	\$157,559	\$158,126	\$158,319	\$153,727	\$148,365

Source: ADE, Inc.

**TABLE A-7  
DEVELOPMENT PHASING FOR HOFFMAN SITE DEVELOPMENT SCENARIO**

<b>ANNUAL</b>	<b>Buildout</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
<b>Units - Annual</b>													
<b>Single Family</b>	0	0	0	0	0	0	0	0	0	0	0	0	0
Multi-family	420	0	0	0	0	0	0	100	100	100	120	0	0
<b>Sq.Ft. - Annual</b>													
Office	0	0	0	0	0	0	0	0	0	0	0	0	0
Retail	60,984	0	0	0	0	0	0	0	0	0	60,984	0	0
R&D/Flex	0	0	0	0	0	0	0	0	0	0	0	0	0
Service/Commercial	128,502	0	0	0	0	43,560	43,560	41,382	0	0	0	0	0
	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>2030</b>	<b>2031</b>	<b>2032</b>
<b>Units - Annual</b>													
Single Family	0	0	0	0	0	0	0	0	0	0	0	0	0
Multi-family	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Sq.Ft. - Annual</b>													
Office	0	0	0	0	0	0	0	0	0	0	0	0	0
Retail	0	0	0	0	0	0	0	0	0	0	0	0	0
R&D/Flex	0	0	0	0	0	0	0	0	0	0	0	0	0
Service/Commercial	0	0	0	0	0	0	0	0	0	0	0	0	0

Source: ADE, Inc.



**TABLE A-8  
HOFFMAN SITE DEVELOPMENT SCENARIO FISCAL IMPACT 2008-2020**

<b>REVENUES</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>
<b>TAXES AND FINES</b>													
General Fund Property Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Sales & Use Tax	\$0	\$0	\$0	\$0	\$32,768	\$67,502	\$108,526	\$117,935	\$127,810	\$426,328	\$439,118	\$452,291	\$465,860
Franchise Fees	\$0	\$0	\$0	\$0	\$1,995	\$4,109	\$11,021	\$16,273	\$21,830	\$31,119	\$32,053	\$33,014	\$34,005
Real Property Tsf. Tax	\$0	\$0	\$0	\$0	\$0	\$150	\$6,831	\$7,936	\$8,903	\$11,206	\$4,814	\$4,897	\$5,016
Transient Occupancy Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>USE OF MONEY OR PROPERTY:</b>													
Investment Income	\$0	\$0	\$0	\$0	\$1,497	\$3,090	\$6,511	\$8,342	\$10,268	\$24,379	\$24,841	\$25,584	\$26,350
<b>INTER-GOVERNMENTAL AGENCIES</b>													
Motor Vehicle-in-lieu	\$0	\$0	\$0	\$0	\$0	\$0	\$16,307	\$33,593	\$51,901	\$74,841	\$77,086	\$79,399	\$81,781
Gas Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$3,767	\$7,761	\$11,991	\$17,290	\$17,809	\$18,343	\$18,894
<b>FEEES FOR SERVICES</b>													
Finance	\$0	\$0	\$0	\$0	\$603	\$1,242	\$3,332	\$4,919	\$6,599	\$9,407	\$9,689	\$9,980	\$10,279
Police Protection	\$0	\$0	\$0	\$0	\$662	\$1,364	\$3,658	\$5,401	\$7,245	\$10,328	\$10,638	\$10,957	\$11,286
Fire Protection	\$0	\$0	\$0	\$0	\$23	\$48	\$129	\$190	\$255	\$364	\$375	\$386	\$398
Engineering	\$0	\$0	\$0	\$0	\$119	\$245	\$656	\$968	\$1,299	\$1,852	\$1,907	\$1,965	\$2,023
Recreation	\$0	\$0	\$0	\$0	\$1,226	\$2,525	\$6,771	\$9,997	\$13,411	\$19,118	\$19,691	\$20,282	\$20,890
Senior Center	\$0	\$0	\$0	\$0	\$0	\$0	\$1,560	\$3,213	\$4,964	\$7,158	\$7,373	\$7,594	\$7,822
<b>OTHER REVENUE</b>													
COMMUNITY FACILITIES DISTRICT	\$0	\$0	\$0	\$0	\$31,809	\$65,526	\$128,601	\$162,381	\$198,073	\$293,734	\$302,546	\$311,622	\$320,971
<b>TOTAL REVENUE</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$70,771</b>	<b>\$145,944</b>	<b>\$298,053</b>	<b>\$379,477</b>	<b>\$465,311</b>	<b>\$928,207</b>	<b>\$949,057</b>	<b>\$977,465</b>	<b>\$1,006,759</b>
<b>EXPENDITURES</b>													
<b>GENERAL GOVERNMENT</b>													
BUILDING DEPARTMENT	\$0	\$0	\$0	\$0	\$4,775	\$9,858	\$26,496	\$39,205	\$52,705	\$75,293	\$77,717	\$80,219	\$82,802
Public Facilities	\$0	\$0	\$0	\$0	\$2,054	\$4,241	\$11,398	\$16,865	\$22,672	\$32,389	\$33,432	\$34,508	\$35,619
POLICE DEPARTMENT	\$0	\$0	\$0	\$0	\$11,074	\$22,861	\$61,442	\$90,914	\$122,220	\$174,598	\$180,220	\$186,024	\$192,013
FIRE DEPARTMENT	\$0	\$0	\$0	\$0	\$3,495	\$7,216	\$19,393	\$28,696	\$38,577	\$55,110	\$56,884	\$58,716	\$60,607
<b>COMMUNITY DEVELOPMENT</b>													
Planning	\$0	\$0	\$0	\$0	\$1,159	\$2,393	\$6,433	\$9,518	\$12,796	\$18,280	\$18,868	\$19,476	\$20,103
<b>PUBLIC WORKS</b>													
Engineering	\$0	\$0	\$0	\$0	\$185	\$382	\$1,026	\$1,518	\$2,040	\$2,915	\$3,009	\$3,106	\$3,206
Streets Maintenance	\$0	\$0	\$0	\$0	\$1,384	\$2,858	\$7,681	\$11,365	\$15,279	\$21,827	\$22,530	\$23,255	\$24,004
Parks Maintenance	\$0	\$0	\$0	\$0	\$1,531	\$3,160	\$8,493	\$12,567	\$16,895	\$24,136	\$24,913	\$25,715	\$26,543
<b>RECREATION &amp; COMMUNITY SERVICES</b>													
Recreation	\$0	\$0	\$0	\$0	\$2,597	\$5,362	\$14,411	\$21,323	\$28,666	\$40,950	\$42,269	\$43,630	\$45,035
Community Center	\$0	\$0	\$0	\$0	\$0	\$0	\$1,353	\$2,792	\$4,323	\$6,247	\$6,448	\$6,656	\$6,870
Senior Center	\$0	\$0	\$0	\$0	\$0	\$0	\$1,116	\$2,304	\$3,567	\$5,155	\$5,321	\$5,492	\$5,669
<b>TOTAL EXPENDITURES</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$28,256</b>	<b>\$58,331</b>	<b>\$159,240</b>	<b>\$237,068</b>	<b>\$319,742</b>	<b>\$456,899</b>	<b>\$471,611</b>	<b>\$486,797</b>	<b>\$502,472</b>
<b>NET (COST)/REVENUE</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$42,515</b>	<b>\$87,613</b>	<b>\$138,813</b>	<b>\$142,409</b>	<b>\$145,569</b>	<b>\$471,309</b>	<b>\$477,446</b>	<b>\$490,668</b>	<b>\$504,288</b>
<b>CUMULATIVE (COST)/REVENUE</b>													
<b>NET PRESENT VALUE</b>													
Redevelopment Tax Increment	\$0	\$0	\$0	\$0	\$24,489	\$48,543	\$146,251	\$223,947	\$278,445	\$391,423	\$388,068	\$387,216	\$393,537

Source: ADE, Inc.

**TABLE A-8 CONT'**  
**HOFFMAN SITE DEVELOPMENT SCENARIO FISCAL IMPACT 2021-2032**

<b>REVENUES</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>2030</b>	<b>2031</b>	<b>2032</b>
<b>TAXES AND FINES</b>												
General Fund Property Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Sales & Use Tax	\$479,836	\$494,231	\$509,058	\$524,330	\$540,060	\$556,261	\$572,949	\$590,138	\$607,842	\$626,077	\$644,859	\$664,205
Franchise Fees	\$35,025	\$36,076	\$37,158	\$38,273	\$39,421	\$40,603	\$41,822	\$43,076	\$44,368	\$45,700	\$47,071	\$48,483
Real Property Tsf. Tax	\$5,133	\$5,253	\$5,376	\$5,502	\$5,631	\$5,762	\$5,897	\$6,035	\$6,177	\$6,321	\$6,469	\$6,621
Transient Occupancy Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>USE OF MONEY OR PROPERTY:</b>												
Investment Income	\$27,139	\$27,952	\$28,789	\$29,652	\$30,540	\$31,455	\$32,397	\$33,367	\$34,366	\$35,396	\$36,456	\$37,548
<b>INTER-GOVERNMENTAL AGENCIES</b>												
Motor Vehicle-in-lieu	\$84,234	\$86,761	\$89,364	\$92,045	\$94,806	\$97,651	\$100,580	\$103,598	\$106,705	\$109,907	\$113,204	\$116,600
Gas Tax	\$19,460	\$20,044	\$20,646	\$21,265	\$21,903	\$22,560	\$23,237	\$23,934	\$24,652	\$25,392	\$26,153	\$26,938
<b>FEEES FOR SERVICES</b>												
Finance	\$10,588	\$10,905	\$11,233	\$11,570	\$11,917	\$12,274	\$12,642	\$13,022	\$13,412	\$13,815	\$14,229	\$14,656
Police Protection	\$11,624	\$11,973	\$12,332	\$12,702	\$13,083	\$13,476	\$13,880	\$14,297	\$14,726	\$15,167	\$15,622	\$16,091
Fire Protection	\$410	\$422	\$435	\$448	\$461	\$475	\$489	\$504	\$519	\$535	\$551	\$567
Engineering	\$2,084	\$2,147	\$2,211	\$2,277	\$2,346	\$2,416	\$2,489	\$2,563	\$2,640	\$2,719	\$2,801	\$2,885
Recreation	\$21,517	\$22,163	\$22,828	\$23,512	\$24,218	\$24,944	\$25,693	\$26,463	\$27,257	\$28,075	\$28,917	\$29,785
Senior Center	\$8,057	\$8,298	\$8,547	\$8,804	\$9,068	\$9,340	\$9,620	\$9,909	\$10,206	\$10,512	\$10,828	\$11,152
OTHER REVENUE	\$1,220	\$1,256	\$1,294	\$1,333	\$1,373	\$1,414	\$1,456	\$1,500	\$1,545	\$1,591	\$1,639	\$1,688
COMMUNITY FACILITIES DISTRICT	\$330,600	\$340,518	\$350,733	\$361,255	\$372,093	\$383,256	\$394,753	\$406,596	\$418,794	\$431,358	\$444,299	\$457,627
<b>TOTAL REVENUE</b>	<b>\$1,036,928</b>	<b>\$1,068,000</b>	<b>\$1,100,004</b>	<b>\$1,132,968</b>	<b>\$1,166,919</b>	<b>\$1,201,888</b>	<b>\$1,237,905</b>	<b>\$1,275,002</b>	<b>\$1,313,210</b>	<b>\$1,352,564</b>	<b>\$1,393,098</b>	<b>\$1,434,847</b>
<b>EXPENDITURES</b>												
<b>GENERAL GOVERNMENT</b>												
<b>BUILDING DEPARTMENT</b>												
Public Facilities	\$36,766	\$37,950	\$39,172	\$40,434	\$41,736	\$43,079	\$44,467	\$45,898	\$47,376	\$48,902	\$50,476	\$52,102
POLICE DEPARTMENT	\$198,196	\$204,578	\$211,166	\$217,965	\$224,984	\$232,228	\$239,706	\$247,424	\$255,391	\$263,615	\$272,103	\$280,865
FIRE DEPARTMENT	\$62,558	\$64,572	\$66,652	\$68,798	\$71,013	\$73,300	\$75,660	\$78,096	\$80,611	\$83,207	\$85,886	\$88,651
<b>COMMUNITY DEVELOPMENT</b>												
Planning	\$20,750	\$21,418	\$22,108	\$22,820	\$23,555	\$24,313	\$25,096	\$25,904	\$26,738	\$27,599	\$28,488	\$29,405
<b>PUBLIC WORKS</b>												
Engineering	\$3,309	\$3,415	\$3,525	\$3,639	\$3,756	\$3,877	\$4,002	\$4,131	\$4,264	\$4,401	\$4,543	\$4,689
Streets Maintenance	\$24,777	\$25,575	\$26,398	\$27,248	\$28,126	\$29,031	\$29,966	\$30,931	\$31,927	\$32,955	\$34,016	\$35,112
Parks Maintenance	\$27,398	\$28,280	\$29,190	\$30,130	\$31,101	\$32,102	\$33,136	\$34,203	\$35,304	\$36,441	\$37,614	\$38,825
<b>RECREATION &amp; COMMUNITY SERVICES</b>												
Recreation	\$46,485	\$47,982	\$49,527	\$51,122	\$52,768	\$54,467	\$56,221	\$58,031	\$59,899	\$61,828	\$63,819	\$65,874
Community Center	\$7,092	\$7,320	\$7,556	\$7,799	\$8,050	\$8,309	\$8,577	\$8,853	\$9,138	\$9,432	\$9,736	\$10,049
Senior Center	\$5,852	\$6,040	\$6,235	\$6,435	\$6,643	\$6,857	\$7,077	\$7,305	\$7,540	\$7,783	\$8,034	\$8,293
<b>TOTAL EXPENDITURES</b>	<b>\$518,651</b>	<b>\$535,352</b>	<b>\$552,590</b>	<b>\$570,384</b>	<b>\$588,750</b>	<b>\$607,708</b>	<b>\$627,276</b>	<b>\$647,474</b>	<b>\$668,323</b>	<b>\$689,843</b>	<b>\$712,056</b>	<b>\$734,984</b>
<b>NET (COST)/REVENUE</b>	<b>\$518,276</b>	<b>\$532,648</b>	<b>\$547,414</b>	<b>\$562,584</b>	<b>\$578,169</b>	<b>\$594,180</b>	<b>\$610,629</b>	<b>\$627,527</b>	<b>\$644,887</b>	<b>\$662,721</b>	<b>\$681,042</b>	<b>\$699,862</b>
CUMULATIVE (COST)/REVENUE	\$3,018,905	\$3,551,554	\$4,098,967	\$4,661,551	\$5,239,720	\$5,833,900	\$6,444,529	\$7,072,056	\$7,716,943	\$8,379,665	\$9,060,707	\$9,760,569
<b>NET PRESENT VALUE</b>												
Redevelopment Tax Increment	\$392,290	\$390,730	\$388,835	\$386,586	\$383,952	\$377,304	\$373,729	\$360,756	\$356,003	\$350,724	\$335,311	\$318,833

Source: ADE, Inc.