## Advance Agenda Material

Please Retain For September 10, 2019
Board Meeting



## **Inter Office Memo**

DATE:

September 6, 2019

TO:

Board of Supervisors

FROM:

Jean M. Rousseau, County Administrative Officer

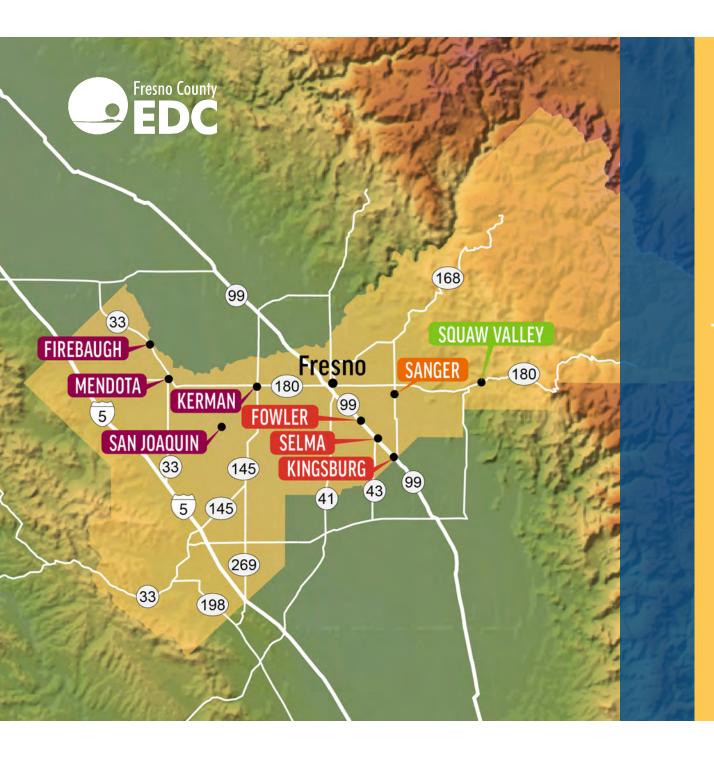
SUBJECT:

Advance Agenda Materials - September 10, 2019

On September 10, 2019, the Economic Development Corporation (EDC) and a team of experts in the field of economic development, corporate site selection, infrastructure finance, and market analysis, will present an Opportunity Analysis to your Board.

The project goal was to work with the small cities and rural communities along key transportation corridors within Districts 1, 4 and 5 to identify specific catalyst properties that have development opportunities and outline the steps needed to make these sites "shovel-ready" for development, allowing the EDC, County of Fresno and participating cities to market to target industries.

The report is 270 pages; therefore, it is provided to your Board digitally for review via an emailed attachment as well as a CD.



# FRESNO COUNTY OPPORTUNITY ANALYSIS

HIGHWAY 99 CORRIDOR WESTSIDE SANGER HIGHWAY 180

SEPTEMBER 2019 ]

## **ACKNOWLEDGMENTS**

## **City and County** stakeholders/interviewees

FIREBAUGH - Ben Gallegos, City Manager

FRESNO COUNTY - Chris Motta. Kristi Johnson, Bernard Jimenez

FRESNO COUNTY SUPERVISOR - Nathan Magsig

**FOWLER** – Randy Uyeda, Acting City Manager

KERMAN - Marci Reyes, City Clerk; John Kunkel, City Manager; Olivia Pimentel, Assistant Planner; Rhonda Armstrong, Mayor

KINGSBURG – Jolene Polyack, Economic Development

MENDOTA - Matt Flood, Economic **Development Director** 

**REEDLEY** - Nicole Zieba, City Manager

SAN JOAQUIN - Elizabeth Nunez, City Manager; Noe Martinez, Principal Engineer, Gouvela Engineering; Mario Gouvela, President, Gouvela Engineering; Eric VonBerg, Rincon Consulting; Stan Bulla, Public Works Director

**SANGER** – Tom Navarro, Community Development Director; Tim Chapa, City Manager

SELMA - Isaac Moreno, Asst. City Manager; Tereasa Gallavan, City Manager

## Community stakeholders/interviewees

**BEAR MOUNTAIN PIZZA** – Kim Castillo

**CALTRANS** - Michael Navarro, Chief Transportation Planning – North, Local Programs & Environmental Analysis; David Padilla, Associate Transportation Planner, Caltrans Office of Planning & Local Assistance

CAT HAVEN - Dale Anderson

**CLINGANS JUNCTION COFFEE AND CABINS** – Mimi Dysart

CSU FRESNO - Mark Salwasser

**DIVERSIFIED DEVELOPERS GROUP -**John Brelsford, President; Mathew Walker, Project Manager

**DUNLAP SCHOOL** – Keith Merrihew

FARM BUREAU - Ryan Jacobson

FRESNO COUNTY CVB - Layla Forstedt, Gay Fontana

FRESNO STATE WINERY DEPARTMENT-VITICULTURE & ENOLOGY - Kevin Smith

FRESNO YOSEMITE INTERNATIONAL AIRPORT - Claudia Arguelles-Miller

G3 DEVELOPMENT COMPANY -Leland Parnagian, President

**GENA'S SIERRA INN** - Gena Bulman

GINGER AND BOB'S VINEYARD AND **DESCHUTES BREWERY** - Bob and Ginger Clingan

KINGS RIVER PACKING - Brad Bishel

KIPER AND KIPER TRUE VALUE **HARDWARE** 

LOCAL AREA FORMATION COMMISSION

LOVEWELL'S PROPANE

MODERN BROKER **REALTY** – Josh Morrison

NATIONAL PARK SERVICE -Woody Smeck

**NEWMARK PEARSON REALITY -**Nick Audino, Senior Vice President

PG&E - Bob Riding, Economic **Development Specialist** 

SANGER CHAMBER OF COMMERCE -Karen Pearson

SAN JOAQUIN VALLEY RAILROAD

SELMA-KINGSBURG-FOWLER **SANITATION DISTRICT -**

Veronica Cazares, PE, District Engineer

SIERRA GATEWAY TRUST - BJ Spitze

SIERRA PEAKS WINERY - Christine and Chuck Flannigan

SIERRA RESOURCE CONSERVATION **DISTRICT** - Steve Haze

SQUAW VALLEY REALTY/MOTEL -**Lonnie Work** 

USDA RURAL DEVELOPMENT OFFICE

VALLEY DEVELOPMENT COMPANY, LLC -Timothy Jones; Nick Bruno, P.E., Project Manager

**VINTNERS** – Tammy and Raymond Ahumada, Stacy Denbow, Sheryl and Ken Mercier

WONDER VALLEY RESORT AND **CONFERENCE CENTER** – Ray Oken, Stan Oken, Kalene Ramirez



Lee Ann Eager, President/CEO Will Oliver, Director of Business Services

Tracy Tosta, *Economic Development* Specialist

Amanda Bosland, Retail Business Development Specialist

**Fresno County Economic Development** Corporation

906 N. Street, Ste. 120 Fresno, CA 93721 Tel: (559) 476-2500 www.fresnoedc.com



September 5, 2019

Dear Chairman Magsig and Members of the Fresno County Board of Supervisors:

On behalf of the Fresno County Economic Development Corporation, we are pleased to submit to you the 2019 Fresno County Opportunity Analysis.

First, we would like to extend our thanks to the project sponsors, Chairman Nathan Magsig (District 5), Supervisor Buddy Mendes (District 4), and Supervisor Brian Pacheco (District 1) for their foresight and investment in this project. The Opportunity Analysis received many contributions in helping guide this work, including but not limited to, Chief Administrative Officer Jean Rousseau, Assistant Director Bernard Jimenez and County of Fresno staff, city leaders, Caltrans, utility providers, community members, and industry representatives. The project team was led by consultants Chabin Concepts, DSG Advisors, Marketek, Inc. and Keyser Marston Associates. With such involvement and insights provided, the Opportunity Analysis represents an unprecedented effort focused on our small cities and rural communities in realizing their community and economic development goals.

In summary, the Opportunity Analysis' primary objectives and outcomes are fourfold:

- Inventory the unique assets and strengths in our small communities and within key transportation corridors through the lens of a corporate site selector and economic development experts in helping shape the value proposition and possibilities for each community;
- Evaluate prospective catalytic undeveloped sites that can support future job generators through direct input from the project sponsors, cities and communities represented;
- Begin to identify next steps required to ready properties for development; and
- Conduct an order of magnitude financial analysis that looks at new infrastructure financing tools, such as Enhanced Infrastructure Financing Districts, that are available to local governments to make way for project investments in the near future.

While Fresno County is home to the fifth largest city in the world's fifth largest economy, the future of Fresno County rests in our small cities, and rural communities, where quality of life and business prosperity meet. We hope that you find the Opportunity Analysis to be a useful tool in guiding our collective economic development efforts, strategic priorities, and funding potential to support future job generating investment in our small cities and rural communities.

Again, we would like to extend our appreciation to the project sponsors, Board of Supervisors, county staff, project team, community members, and all who contributed to this project.

Sincerely,

Lee Ann Eager President/CEO

Ju fun lager

Fresno County Economic Development Corporation

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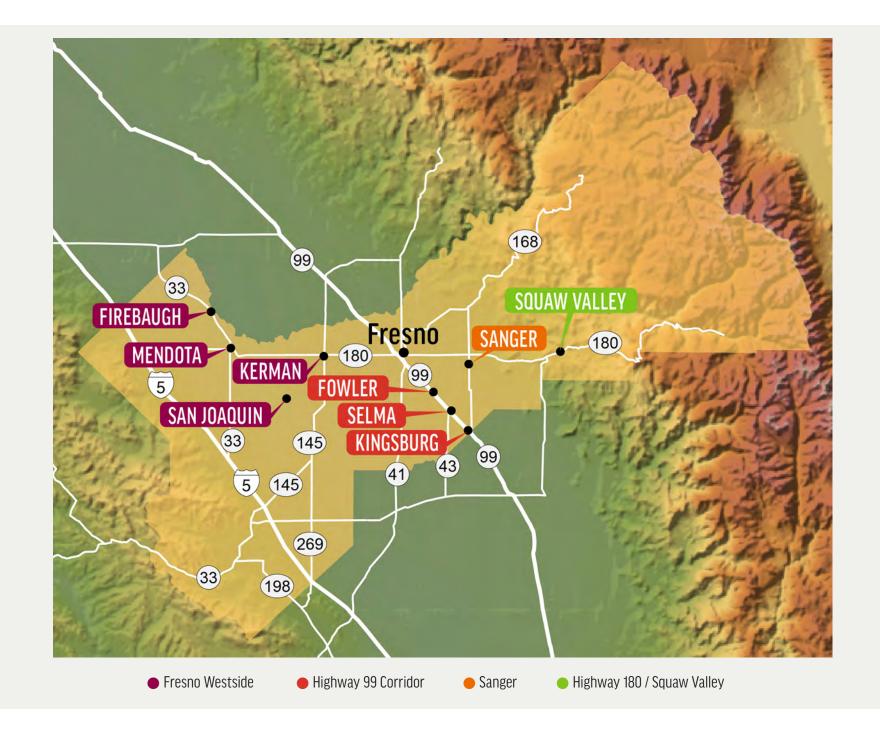
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## **OVERVIEW**

In collaboration with the County of Fresno, local cities, and community partners, the mission of the Fresno County Economic Development Corporation (Fresno EDC) is to market Fresno County as the premier location for business prosperity. The EDC facilitates both site selection for new businesses and assists in the retention and expansion of businesses through alliances with collaborative partners. It is within the spirit of this mission that an Opportunity Analysis of selected county communities and properties is undertaken.

**Opportunity Analysis objectives** are twofold: 1) Identify sites in each community that can support job creating investments that will catalyze investments on other area properties, and 2) Compile a list of community and property assets that offer a value proposition each community can use to pursue development opportunities. The ultimate goal is to attract projects that put each community on a trajectory for continuous growth.

## **Project Study Area**

The word *Opportunity* has multiple meanings in this effort. *Opportunity Analysis* is the name given to the overall study. The analysis involves looking at physical assets (e.g. land, transportation and utility infrastructure), community attributes (e.g. zoning, general plan, local economy), and development trends (e.g. local, county, region).

The countywide initiative includes areas with markedly different social, economic, infrastructure, and development characteristics. Consequently, the investigation was divided in four distinct groupings (**Fig. 1**):

- 1. **Highway 99 Corridor Communities** Selma, Kingsburg, Fowler
- 2. Westside Communities Kerman, Firebaugh, Mendota, San Joaquin
- 3. Sanger
- 4. Highway 180 / Squaw Valley

**Opportunity Sites** are the properties that survive a screening of available properties in each community. Two Opportunity Sites in each community were selected for detailed investigation. To qualify as an Opportunity Site, properties had to meet the following criteria:

- Site size is sufficient to support a catalyst project.
- Site is well-located for industrial, office, or commercial use.

The term *Opportunity Zone* appears occasionally in this report. An Opportunity Zone is defined by the U.S. Department of the Treasury as an economically-distressed community where new investments, under certain conditions, may be eligible for preferential tax treatment. Opportunity Zone boundaries coincide with census tracts which have been designated as eligible to receive private investments through qualified Opportunity Funds. Opportunity Funds are a private investment vehicle, certified by the U.S. Treasury, to aggregate and deploy capital in Opportunity Zones for eligible uses.

Opportunity Zones in the investigated communities and sites are summarized below:

- Selma none
- Kingsburg none
- Fowler yes, 1 site, census tract 001700
- Kerman none
- Firebaugh none
- Mendota yes, 1 site, census tract 008302
- San Joaquin yes, 2 sites, census tract 008200
- Sanger yes, 2 sites, census tracts 006201 & 006202
- Highway 180 / Squaw Valley none

## **Project Approach**

Execution of the Opportunity Analysis involved a highly collaborative process that included the Chabin consulting team, Fresno EDC leadership and staff, community administrators and staff, private sector developers, utility companies, Caltrans, and other engaged stakeholders. Identification and analysis of Opportunity Sites followed these steps:

- Documents outlining project steps, data requirements, and proposed schedule were prepared for each community and sent to Fresno EDC for review prior to sending to the communities.
- 2. **The EDC-approved project documents** were sent by the Chabin team to each city. The documents listed property data required for sites to be considered for Opportunity Site designation. City representatives uploaded data to the project online database, *Basecamp*. Information requested included:
  - City map showing the location of sites
  - Parcel maps and aerial photos of each site
  - Property address and assessor parcel number(s)
  - Property profile if available
  - Utility services to each site
  - Environmental status; if known
  - Zoning
  - Transportation overview including road serving property, traffic counts if available
  - Specific plans
  - General plans
  - Transportation plans
  - Land use maps
  - Brownfield reports
  - Long term planning for site neighborhood

- 3. **Communities' proposed properties were reviewed** by the Chabin Team and Fresno EDC. A short list of candidates was developed and put into a PowerPoint for review with each community.
- 4. **Go-to-Meeting calls** were scheduled with city managers, city staff, and Fresno EDC to review project objectives, procedures, schedule, and the list of Opportunity Site candidates. The review resulted in a further narrowing of candidates to two finalist properties.
- 5. **Maps** were prepared using Geographic Information System (GIS) prior to field investigation. The objective was to better understand the infrastructure context of priority sites and where there are infrastructure needs benefiting neighboring properties.
- 6. Field investigation occurred January 22-23, 2019. Field investigation involved on-site meetings with city managers and staff (engineering, planning, public works) to discuss details of each site, infrastructure, community vision of site, and community context capital improvement plans, economic development plans, trends, industry targets, workforce, and incentives.
- 7. **Interviews** were also conducted with community stakeholders to better understand development trends, infrastructure needs, and challenges and opportunities in the region.
- 8. **Separate reports** were prepared for each of the four Fresno County areas, detailing characteristics of each Opportunity Site and community. Each section addresses the following points:
  - Overview of the sites and community
  - Transportation and utility infrastructure
  - Property data
  - Property strengths and weaknesses
  - Land use and neighboring business operations
  - Actions required to ready property for development

## Fresno County Industry Trends

An assessment of each Opportunity Site was conducted within the context of Fresno County economic trends. Trends were identified through a review of published reports and from interviews with community stakeholders.

### **Agricultural Sector**

The Fresno-Madera Metropolitan Statistical Area (MSA) has seen its farming employment consistently shrink since 1990. Total farming employment has contracted by a Compounded Average Annual Growth Rate (CAAGR) of -0.48 percent from 1990 to 2016 and a CAAGR of -0.50 percent from 2011 to 2016. In contrast, California and the United States have experienced growth of farming employment, with a CAAGR of 0.49 percent and 0.56 percent respectively from 1990 to 2016. From 2011 to 2016 the growth in farming employment was even more pronounced for California and the United States with 1.72 percent and 1.64 percent increases of CAAGR respectively (see **Table 1**).

The agricultural sector average wage in Fresno-Madera has shown a steady rise over recent years. While the sector has consistently seen a decline in employment, the average wage of the farming sector has experienced the highest growth in real average wages versus all other sectors and industries following the Great Recession. From 2011 to 2016, the real average wage in farming in Fresno-Madera grew by a CAAGR of nearly 5 percent, more than three times the growth rate of the second highest sector, Other Goods Producing, which grew by a CAAGR of nearly 1.5%.

Fresno County Farm Bureau representative Ryan Jacobson provided insights into Fresno County's shrinking ag sector employment and rising

wages. Mr. Jacobson reports that the ag sector in the Central Valley continues to evolve and is changing Fresno County's position as a major food producing region. Mr. Jacobson noted the substantial decline of the ag economy in Fresno, reporting that there is an array of developments impacting Fresno's ag economy resulting in a shift in crops being grown and a reduction of land in cultivation. Among the factors bringing change to the economy are:

- Sustainable Groundwater Management Act (SGMA)
- \$15 minimum wage
- AB 1060 overtime rules
- 800% increase in fees over the last 20 years
- High cost of energy

TABLE 1
Composition of Employment Growth in Fresno-Madera MSA (1990-2016)

Industry Sector Type	Area	CAAGR 1990-2016	CAAGR 2011-2016	Y-o-Y 2015-2016
	United States	0.56%	1.64%	0.81%
Farming	Fresno	-0.48%	-0.50%	-0.95%
	California	0.49%	1.72%	0.61%
	USA	-1.42%	1.00%	0.05%
Manufacturing	Fresno	-0.09%	1.13%	-1.38%
	California	-1.79%	0.90%	0.81%
	USA	0.65%	1.61%	1.25%
Utilities, Trade, Transportation	Fresno	0.81%	2.51%	3.36%
	California	0.49%	2.14%	1.79%

According to Mr. Jacobson, the result is an evolving ag economy as fruits and vegetables, cotton, grapes, sweet potatoes, among others, are leaving Fresno and being replaced by permanent crops including almonds and pistachios. These shifts are bringing lower levels of employment and increasing worker skill requirements as automation continues to be introduced.

Ryan Jacobson notes that West Hills Community College – Farm of the Future – is delivering valuable education resources to the market. He goes on to say there is the need for more training resources to address evolving workforce needs. Increased training resources in Fresno County, and particularly in Westside communities, include the following:

- Robotics, automation skills
- Basic work skills show up on time, work responsibility, safety
- Tractor drivers, forklift drivers
- Mechanics, welders
- Information technology, coding
- Transportation and logistics, truck drivers

### **Manufacturing Sector**

The manufacturing sector has experienced a long-standing decline in employment that dates back decades across the Fresno-Madera MSA, California, and the United States. This sector, however, did experience a recovery following the Great Recession. Even though manufacturing was contracting from 1990 to 2016, the Fresno-Madera MSA's manufacturing performance exceeded that of California and the United States, which gave the regional economy an advantage in this sector. During this time period, the Fresno-Madera MSA contracted by a CAAGR of -0.09 percent, while California and the United States contracted by 20 and 16 times more respectively (see **Table 1**).

Real average annual wages of the Fresno-Madera manufacturing sector have outperformed the overall regional economy. From 2011 to 2016, the real average annual wage across all industries in Fresno-Madera grew by a CAAGR of 0.72 percent, while the manufacturing real average wage grew by a CAAGR of 1.06 percent. Arguably more important, the average annual wage for manufacturing exceeded the average annual wage across all industries in Fresno-Madera by over \$4,600 in 2016. For that year manufacturing reported an average annual wage of \$46,323 compared to the average annual wage across all industries in Fresno-Madera of \$41,710.

## **Development Trends**

Area development stakeholders were interviewed to gain insights into challenges and opportunities facing economic growth in the Fresno region. Below are key findings from the interviews:

### **Countywide Observations**

**Deliveries** – The Fresno region is well positioned to serve the growing demand for expedited deliveries to customers in California and the western US. The population in California and the west is still growing and the demand for delivery continues to grow as well.

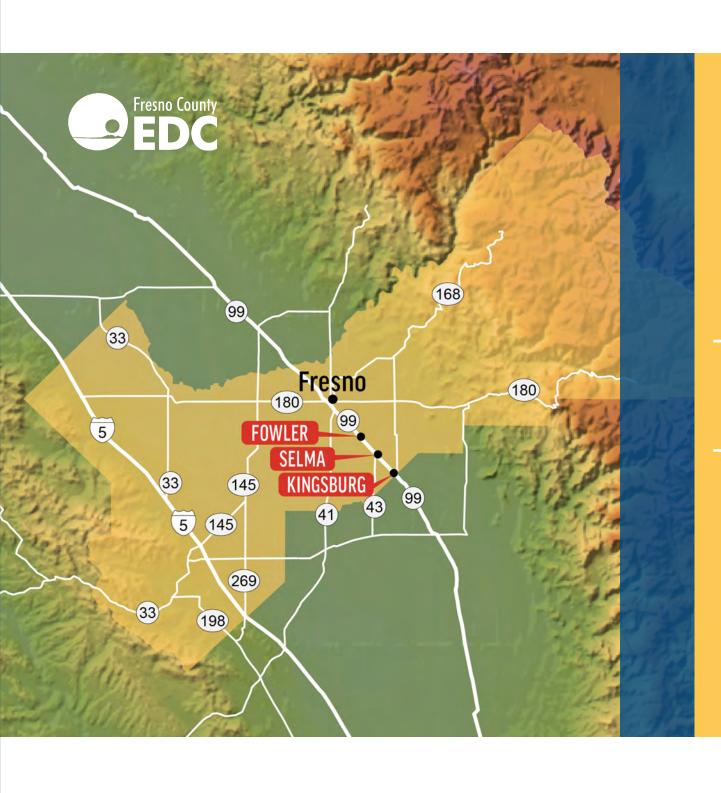
**Distribution Demand** – With the growing population in California and the Western United States, there is a need for logistics and distribution companies and companies with growing e-commerce demands to locate in the region. These companies want to be near Highway 99 and prefer the area just south of the City of Fresno (Fowler Sphere of Influence).

Cost Advantage – Governor Newsom's statement about California's Central Valley high growth potential is concurrent with the region's current economic landscape. The cost of land, operating costs, and the cost of living are all low in the Valley compared to other population centers.

**High Speed Rail** – The full benefits from a working high-speed-rail network will likely be delayed, resulting in economic activity being felt from short-term construction activity.

**Future** – The future for industrial development in Fresno County includes a mix of activities:

- Big box e-commerce and logistics and distribution
- Smaller facilities (10,000 to 100,000 square feet) for service companies – forklift, safety supply, specialty packaging
- Large packaging facilities
- Ag processing and finished food product manufacturing
- Manufacturing of ag focused robotics vision systems, field automation



# FRESNO COUNTY OPPORTUNITY ANALYSIS

HIGHWAY 99 CORRIDOR

FOWLER KINGSBURG SFLMA

SEPTEMBER 2019 ]

# OVERVIEW HIGHWAY 99 CORRIDOR

#### **Recent Announcements**

**FOWLER** - New Adventist/Valley Children's Medical Plaza

**KINGSBURG** - T-Mobile Call Center announced, pending merger

**SELMA** - Amberwood residential project



#### **INDUSTRIAL SPACE**

Inventory: 4.3M SF

Vacancy Rate: 3.7%

Space Pipeline: **154,000 SF** 



#### **RETAIL SPACE**

Inventory: 2.6M SF

Vacancy Rate: 1.6%

Space Pipeline: **5,300 SF** 

Space Source: CoStar Analytics. Accessed July 2019.



MEDIAN SINGLE FAMILY DETACHED HOMES (2018)

\$245,258

MEDIAN ALL HOMES (2018)

\$153/SF

RESIDENTIAL PERMITS (2012–2017)

657

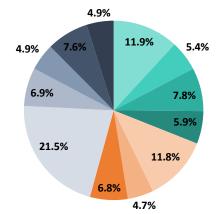
**IOBS:HOUSING RATIO** 

1.36

TAXABLE SALES (2016)

\$678.6 M

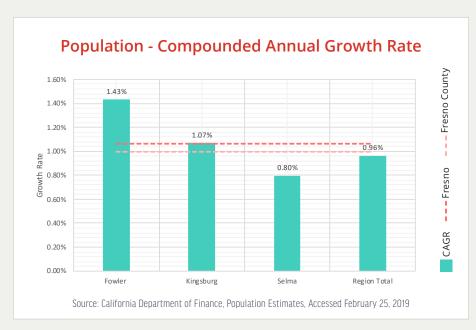


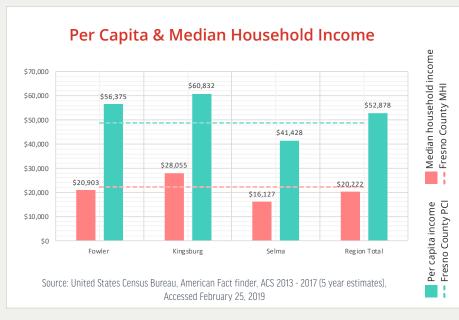


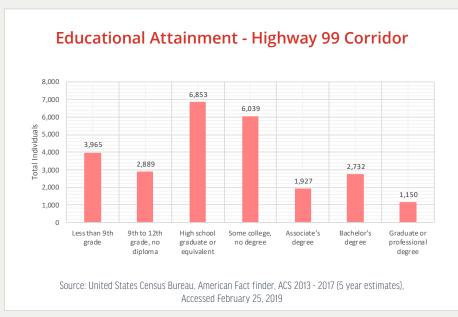
- Agriculture, forestry, fishing and hunting, and mining
- Construction
- Manufacturing
- Wholesale trade
- Retail trade
- Transportation and warehousing, and utilities
- Finance and insurance, and real estate and rental and leasing
- Professional, scientific, and management, and administrative and waste management services
- Educational services, and health care and social assistance
- Public administration
- Other

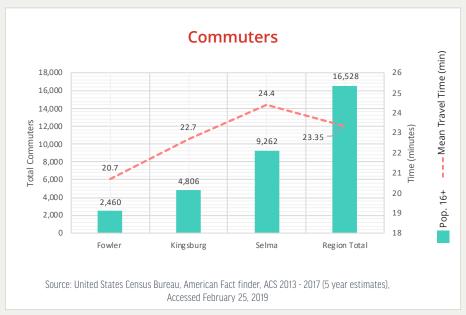
Note: **Other** includes (i) Information, (ii) Arts, entertainment, and recreation, and accommodation and food services, and (iii) Other service

Source: United States Census Bureau, American Fact finder, ACS 2013 - 2017 (5 year estimates), Accessed February 25, 2019









## SITE SELECTOR INSIGHTS

## **HIGHWAY 99 CORRIDOR**

One of the goals of this opportunity analysis was to receive critical feedback on these properties and the region through the eyes of a site selector who evaluates and short-lists sites for corporate executives making decisions for new business and industry locations. The purpose of the site selector insights is to highlight areas that are strengths, gaps or weaknesses for site selection that may need further action.

During the examination of Fresno County's economic trends it emerged that forces shaping development across the county are not uniform but vary from one area to the next. Consequently, separate reports were prepared for each area. The remainder of this report focuses exclusively on the *Highway 99 Corridor*. See **Table 2** for a summary of development forces and investment opportunities in this area. Additional observations:

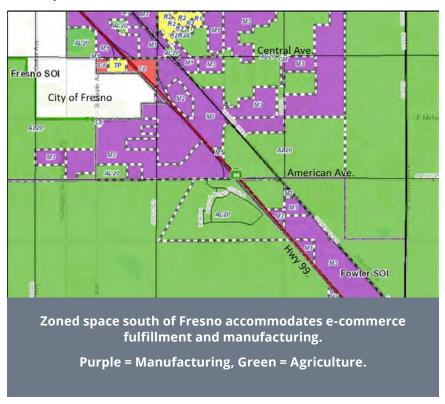
**Big Box** – There is planned zoned land along the Highway 99 corridor south of the City of Fresno that is well-suited for companies with a growing need for e-commerce fulfillment space (e.g., large retailers or Big Box stores) and manufacturing (see **Figure 1**). From a site selector's perspective, Fowler's northern sphere of influence along Highway 99 is a logical place to develop land for warehousing, logistics and distribution, and industrial facilities because it's a virtual extension of the rapid industrial expansion south of Fresno.

Workforce Availability – Fowler offers superior access to labor compared

to areas farther south because it's closer to the Fresno population cluster. Access to a skilled workforce is critical; e-commerce companies need to be able to tap a trained workforce and ramp-up quickly during peak periods (e.g. holidays).

**Incorporated and Unincorporated Fresno County** – Identifying and evaluating Opportunity Sites included examining incorporated and unincorporated areas of Fresno County. For unincorporated Fresno County land to qualify as candidate site it had to meet three criterion.

FIGURE 1
Zoned Space South of Fresno



First, the property had to be within the city's sphere of influence (SOI). Second, the property required an industrial land use designation in the city's latest General Plan. And lastly, a similar industrial or commercial designation in the Fresno County General Plan was required.

Fresno County officials are reported to welcome annexation applications when these conditions are met. Likewise, the Fresno County Farm Bureau is less inclined to protest pulling agricultural land out of production when established land use planning procedures have been followed.

Interchange Improvements – Highway 99 interchanges in south Fresno, Fowler, Selma and Kingsburg are slated for improvements in the coming years. These improvements will enhance the opportunities for attracting new investment provided there are sites ready for development. While funding has not been secured for all projects, it is clear that Caltrans recognizes that growth is pushing down the Highway 99 Corridor. Projects under study by Caltrans include:

- North Avenue / Cedar Avenue combined into one interchange
- Chestnut Avenue / Central Avenue combined into one interchange
- Full interchange at American Avenue
- Roundabouts at Highway 99 / Clovis Avenue interchange
- Reconstruction of East Manning Avenue
- Reconstruction of East Mountainview Avenue

TABLE 2
Economic Forces and Opportunities in Highway 99 Corridor Communities

Economic Forces and the Availability of Developable Land	City	Catalyst Project Opportunities
New and expanding distribution centers and manufacturing plants in the south	Fowler	Big box distribution, manufacturing, ag services, ag processing
Fresno industrial district along with the dislocation by high-speed rail of small and mid-sized manufacturing and service operations have together	Selma	Manufacturing, ag services, ag processing, retail, commercial
reduced the inventory of available industrial land.	Kingsburg	Tourism, manufacturing, ag services, office

HIGHWAY 99 CORRIDOR

CITY OF FOWLER

## CITY OF FOWLER

## CITY PROFILE

#### **CITY CONTACT:**

Jeannie Davis, City Manager jdavis@ci.fowler.ca.us (559) 834-3113

### **Community Projects**

**Adventist Health/Valley Children's Hospital** 50,000 SF clinic and medical offices

#### **Commercial Infrastructure**

17 acre extension to downtown planned

#### **Industrial Lands**

800 acre annexation planned in Fowler SOI



#### **INDUSTRIAL SPACE**

Inventory: 4.3M SF

Vacancy Rate: 3.7%

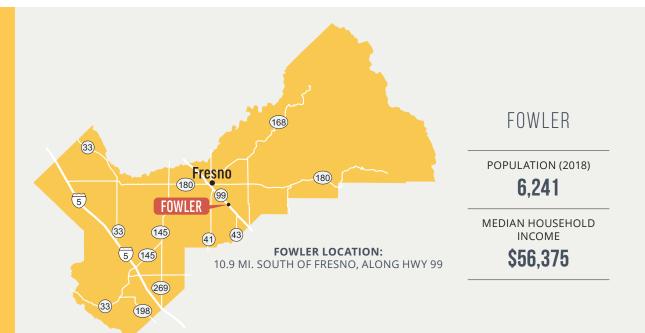


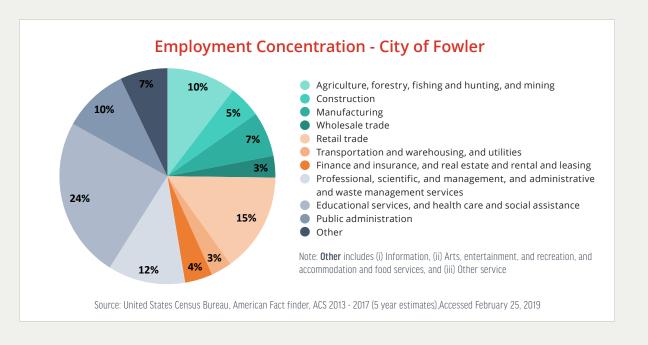
#### **RETAIL SPACE**

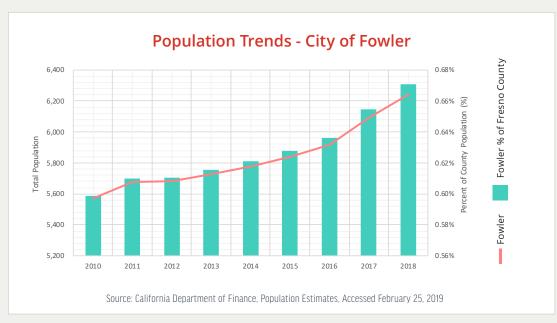
Inventory: 2.6M SF

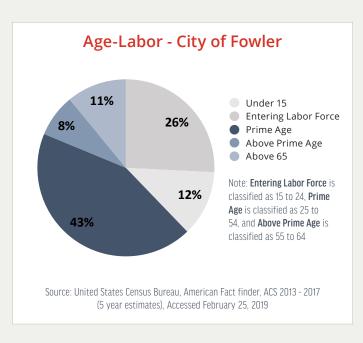
Vacancy Rate: 1.6%

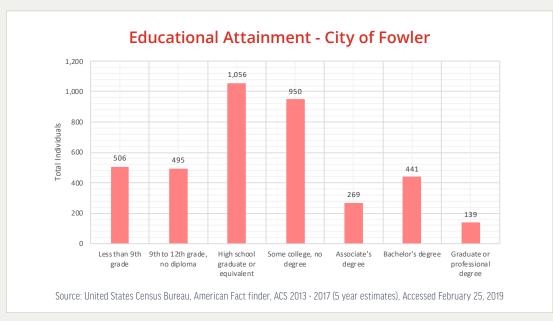
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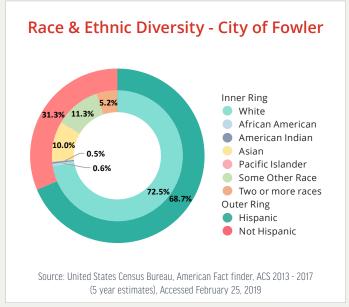










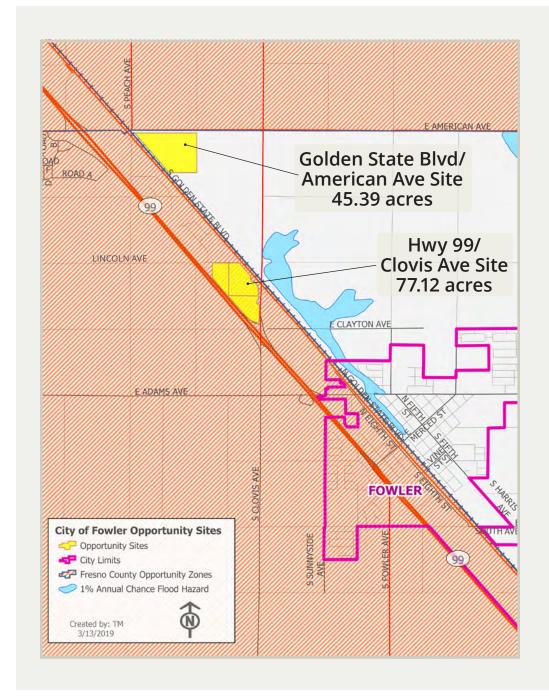


## CITY OF FOWLER

## **OPPORTUNITY SITES**

Golden State Blvd/American Ave » The City of Fowler Highway 99-corridor sphere of influence extends to American Avenue and includes both sides of Golden State Blvd. The site area includes a cluster of several dozen light industry operations located between Highway 99 and Golden State, and south of American Avenue and north of Lincoln Avenue. Most of these are in unincorporated areas. North of American Avenue is a short stretch of ag land before the south Fresno major concentration of industrial, distribution, and commercial development begins. As the inventory of available industrial land in south Fresno continues to shrink, increased development pressure will be felt at American Avenue and in the Fowler sphere of influence. Development of the American Avenue site would likely provide a catalyst for investment in neighboring vacant parcels.

**Highway 99/Clovis Ave »** The Clovis Avenue site is the logical extension for the industrial cluster immediately to the north. An added advantage of the Clovis Avenue site is a Federal Opportunity Zone designation.



HIGHWAY 99 CORRIDOR

CITY OF FOWLER

SITE:

GOLDEN STATE AT AMERICAN



PAGE 2-12

## SITE: GOLDEN STATE AT AMERICAN

## TRANSPORTATION & UTILITIES

## **Transportation**

The Golden State/American Avenue property is served by American Avenue, a two lane arterial roadway that is generally well suited for truck vehicles. Highway 99 access is .2 miles to the west via American. At the northwest corner of the property American Avenue crosses railroad tracks that parallel Golden State Boulevard creating limited staging area for west bound vehicles crossing the intersection. For vehicles continuing on American Avenue west of Golden State Boulevard, a similar constraint is present created by the T-intersection at Peach Avenue.

## **Utilities**

Water – Contact city for info.

**Sewer** – Service provided by SKF via an interceptor on east side of Golden State Blvd.

Natural Gas - Service provided by PG&E.

**Electric** – 12kV service is at the site, provided by PG&E.

**Broadband** - Contact city for info.



## SITE: GOLDEN STATE AT AMERICAN SITE DATA

## **Strengths**

- Highway 99/American Avenue interchange is within 1/4 mile of property.
- Water, wastewater, natural gas, and electric power are in proximity of the site and can support industrial operations.
- Upgrades to nearby wastewater interceptor lift stations that began in 2018 will be completed in 2022 and will increase allowed discharge from the property.
- Surrounding land uses are compatible with industrial operations.
- Fowler General Plan designates the property as Heavy Industrial.

## Weaknesses

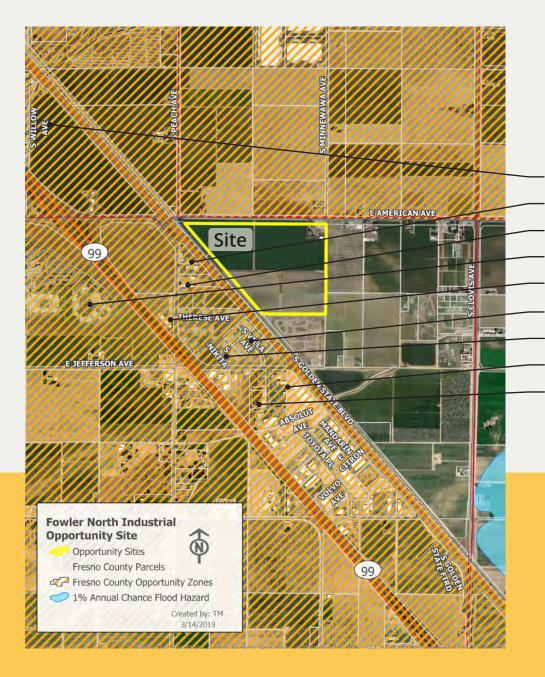
- At grade crossing of the rail tracks at American and Golden State has minimal distance separation from intersection creating a dangerous situation for stopped vehicles.
- American Avenue west of Golden State Blvd is a circuitous route to Highway 99 and is a possible choke point for truck traffic.

#### FRESNO COUNTY OPPORTUNITY SITE(1)

## SITE: Golden State at American

Address	SW Corner - S. Golden State Blvd and S. Clovis Ave
City	Fowler, CA
Assessor Parcel Number (APN)	340-150-39; 340-150-38; 340-150-27
Jurisdiction (City / County)	County
Opportunity Zone (Yes / No)	Yes
Ownership (Public / Private)	Private
Current Use	Agriculture
Site Acreage / Developable Acres (est.)	58 Acres (14 + 27 +17)
Acreage within flood plain/floodway	None
Zoning	Agriculture/Open Space by Fresno County
General Plan Designation	Heavy Industrial
Nearest Limited Access Highway / Distance	99 / . 2 miles
Rail Access Available to Site	Yes
Electric Power Provider	PG&E
Circuit serving site (kV / location)	12 / Malaga 1102 at site
Circuit kV capacity (total / peak load)	11.55 / 7.63
Substation dist. / kV capacity (total / peak)	miles / 42.05 / 34.34
Natural Gas Provider	PG&E
Line serving site - location and size	Contact city for info
Water Provider	Contact city for info
Line serving site - location and size	Contact city for info
System capacity / average daily use (MGD)	Contact city for info
Wastewater Provider	Selma-Kingsburg-Fowler Sanitation District
Line serving site - location and size	Interceptor in Golden State Blvd. at site
Lift stations / force mains - location	Lift station upgrades underway
System capacity / average daily use (MGD)	8 MGD / 4 MGD
Broadband Provider	Contact city for info
Line serving site - location and capacity	Contact city for info
Development Status - EIR, CEQA, etc.	Contact city for info
(1) Sites were identified by City/County officials in	conjunction with the consulting team as Opportunity Sites that align

(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.



## SITE: GOLDEN STATE AT AMERICAN

## **LAND USE**

LKO Heavy Trucks

VM Custom Boat Trailers

Custom Pipe & Coupling

Fresno County Juvenile Justice Center

Dreyers Grand Ice Cream

Klippenstein Construction

Vita Pkt Citrus Products

Zim Industries

Waste Management Transfer Station

## **Surrounding Land Uses**

Land to the north and directly southeast and east are primarily in agriculture. Land across Golden State Blvd to the southwest is home to a concentration of light industrial and commercial service activities all within and approved by Fresno County. Operations include ice cream manufacturing, citrus packing, waste transfer station, construction companies, and trucking companies. A large county justice center is located west of Highway 99.

## SITE: GOLDEN STATE AT AMERICAN

## RECOMMENDATIONS

COMMUNITY: Fresno County (Fowler sphere of infl.)
SITE: Golden State Blvd at American Ave

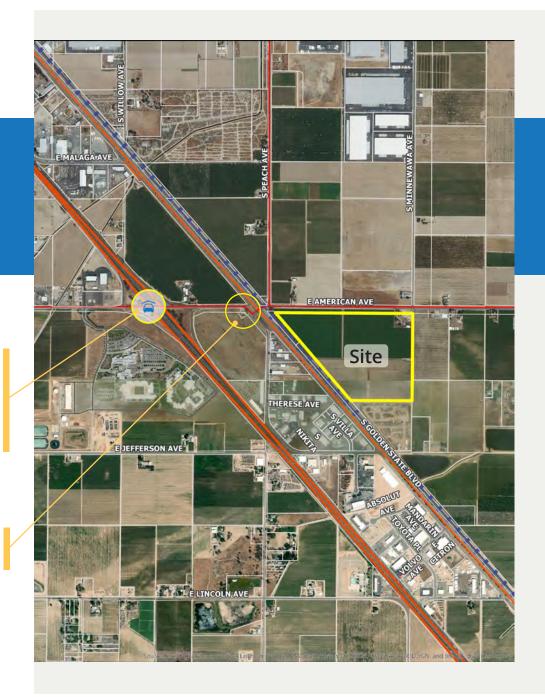
#### **RECOMMENDED USE:**

Light or heavy industrial and distribution operations that utilize rail\*

## Investments required to ready property for market

- 1. Caltrans is currently in the Project Approval and Environmental Document (PA & ED) phase as part of the South Fresno Interchange Project. American Avenue is slated as Tier 1 project under Measure C. Funding for right-of-way acquisition is set for 2021/2022. The "Open to Traffic" date or year expected for completion is 2027.
- 2. Engineering and costs estimates are recommended for the connection of water, wastewater, natural gas and electric lines to the site.
- 3. Removing the 'T' intersection, or adding a grade separation on American Avenue west of Golden State would improve traffic flow and vehicle safety.
- 4. A master plan, that includes preliminary engineering and costs estimates, is recommended. Showing how rail can be used on the site could enhance the marketability of the property.

<sup>\*</sup>There are nearby examples of rail projects being built; the railroad would have to be involved in studying access.



HIGHWAY 99 CORRIDOR

CITY OF FOWLER

SITE:

## HIGHWAY 99 AT CLOVIS



Hwy 99 Clovis, looking west - view from Clovis overpass - site beyond RR N. Golden State, Fowler. [Google Street View]

## SITE: HIGHWAY 99 AT CLOVIS

## TRANSPORTATION & UTILITIES

## **Transportation**

The Highway 99 at Clovis Avenue property is served by Golden State Blvd and offers immediate access to the Clovis Avenue/Highway 99 interchange. American Avenue/Highway 99 interchange is located 1.6 miles to the northwest, providing dual access routes to the property.

## **Utilities**

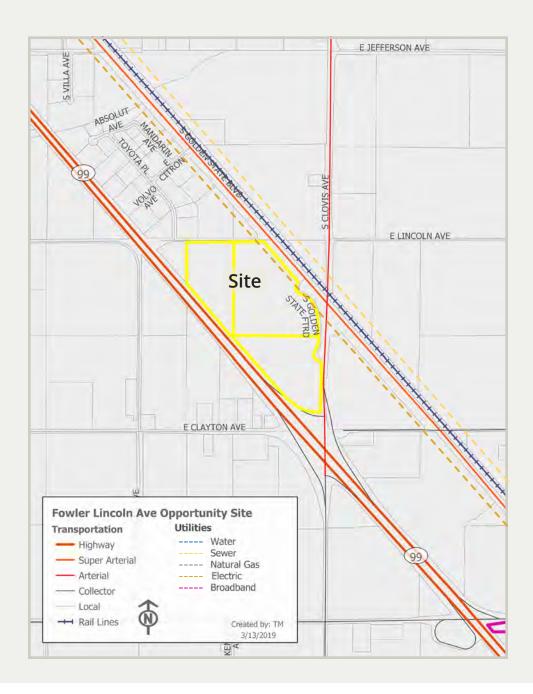
Water – Contact city for info.

**Sewer** – service is provided by SKF via an interceptor on east side of Golden State Blvd.

Natural Gas - Service provided by PG&E.

**Electric** – 12kV service is at the site, provided by PG&E. .

**Broadband** - Contact city for info.



## SITE: HIGHWAY 99 AT CLOVIS

## SITE DATA

## Strengths

- The property is in a Federally designated Opportunity Zone.
- Highway 99/Clovis Avenue interchange borders the property.
- Grade separated crossing of Clovis Avenue from the rail line and Golden State Blvd provides added safety and access.
- Water, wastewater, natural gas, broadband, and electric power are in proximity of the site and can support industrial operations.
- Upgrades to nearby wastewater interceptor lift stations that began in 2018 will be completed in 2022 and will increase allowed discharge from the property.
- Surrounding land uses are compatible with industrial operations.
- The site offers visibility from Highway 99.
- Fowler General Plan designates the property for Heavy Industrial.
- Property ownership of the 14 acre parcel on northwest corner of focus area has a project underway. County of Fresno has processed entitlements to allow for heavy industrial development. Ownership group has development capacity and track record with additional plans in progress, allowing for site to spark development potential among adjacent properties. Current ownership is encouraged by County's Opportunity Analysis project and wanting to discuss ways to leverage this project and additional properties within the corridor.

### Weaknesses

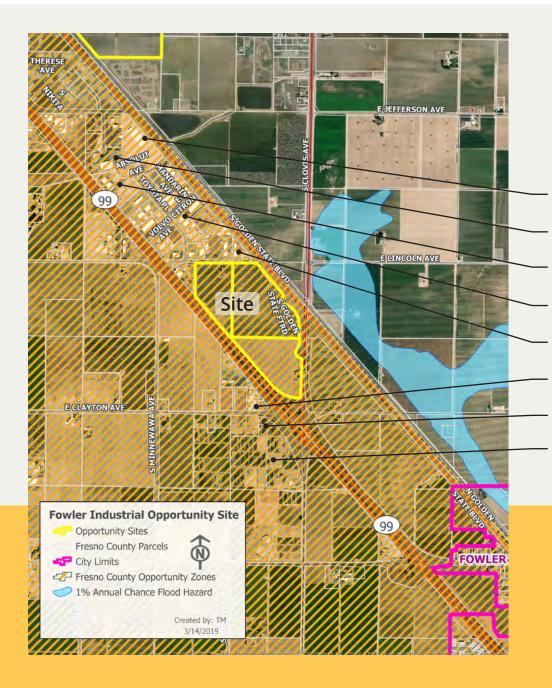
• Currently, there are no plans for improvements to the Clovis Avenue interchange.

#### FRESNO COUNTY OPPORTUNITY SITE(1)

## SITE: Highway 99 at Clovis

Address	4073 East American Ave
City	Fowler, CA
Assessor Parcel Number (APN)	340-070-03
Jurisdiction (City / County)	County
Opportunity Zone (Yes / No)	No
Ownership (Public / Private)	Private
Current Use	Agriculture
Site Acreage / Developable Acres (est.)	77.12 / 77.12
Acreage within flood plain/floodway	None
Zoning	Agriculture/Open Space by Fresno County
General Plan Designation	Heavy Industrial
Nearest Limited Access Highway / Distance	99 / .5 miles (1.6 miles to full interchange)
Rail Access Available to Site	Yes
Electric Power Provider	PG&E
Circuit serving site (kV / location)	12 / Malaga 1102 at site
Circuit kV capacity (total / peak load)	11.55 / 7.63
Substation dist. / kV capacity (total / peak)	miles / 42.05 / 34.34
Natural Gas Provider	PG&E
Line serving site - location and size	Contact city for info
Water Provider	Contact city for info
Line serving site - location and size	Contact city for info
System capacity / average daily use (MGD)	Contact city for info
Wastewater Provider	Selma-Kingsburg-Fowler Sanitation District
Line serving site - location and size	Interceptor in Golden State Blvd.
Lift stations / force mains - location	Lift station upgrades underway
System capacity / average daily use (MGD)	8 MGD / 4 MGD
Broadband Provider	Contact city for info
Line serving site - location and capacity	Contact city for info
Development Status - EIR, CEQA, etc.	Contact city for info
(1) Sites were identified by Sity/County officials in	conjunction with the conculting team as Opportunity Sites that align

(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.



### SITE: HIGHWAY 99 AT CLOVIS

## LAND USE

Wasco Hardfacing

Toyota Material Handling

Volvo Construction Equipment

TTR Substations, Inc.

Trius Trucking

Sun Belt Rentals

Shant Bhavan Funeral Home

**Bushnell Nursery** 

#### **Surrounding Land Uses**

Land immediately to the northwest between Golden State and Highway 99 is home to a concentration of light industrial and commercial service activities. Operations include trucking firms, equipment rental, and agricultural field services. Land to the north, southeast and east is primarily agriculture.

#### SITE: HIGHWAY 99 AT CLOVIS

## RECOMMENDATIONS

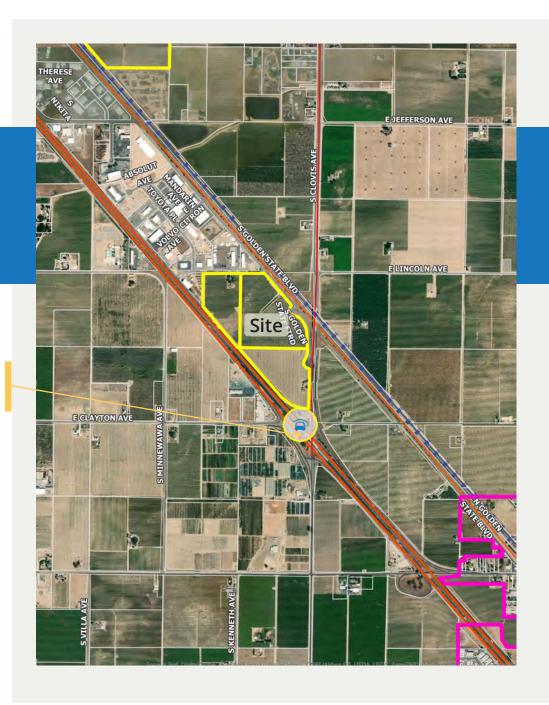
COMMUNITY: Fresno County (Fowler sphere of infl.)
SITE: Highway 99 at Clovis

**RECOMMENDED USE:** 

Light or heavy industrial operations, distribution

### Investments required to ready property for market

- 1. Caltrans identified through a local development project's traffic impact study, the need for future and interim improvements intersection ramps.
- 2. Adjacent and area properties can be leveraged with development activity that's being made possible at the 14 acre site. A recent Traffic Impact Study was completed in 2018 that outlined improvements necessary to increase capacity for future users, such as a traffic signal at the intersection or roundabouts. Such proactive investments can spark increased capacity and viability of surrounding, underutilized parcels.
- 3. Engineering and costs estimates are recommended for the connection of water, wastewater, natural gas and electric lines to the site.



## CITY OF KINGSBURG

#### CITY OF KINGSBURG

## CITY PROFILE

#### **CITY CONTACT:**

Alexander Henderson, City Manager ahenderson@cityofkingsburg-ca.gov (559) 897-5821

#### **Community Projects**

**Kingsburg Business Park** – 40+ acres, shovel-ready light industrial and highway commercial.

**Downtown Facade and Alley Improvement** – Public/private fund to encourage investment and revitalization.

**Regional Sports Complex** – Initial funding secured by City; exploring land acquisition.



#### **INDUSTRIAL SPACE**

Inventory: 1.3M SF

Vacancy Rate: 0%

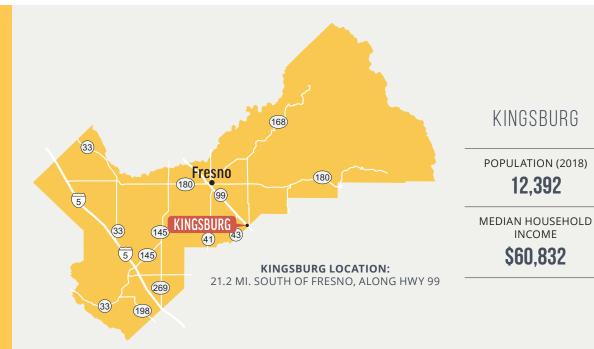


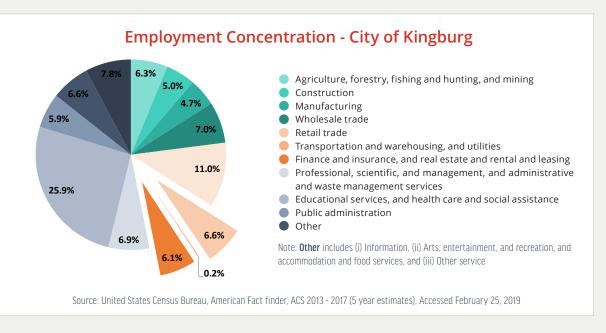
#### **RETAIL SPACE**

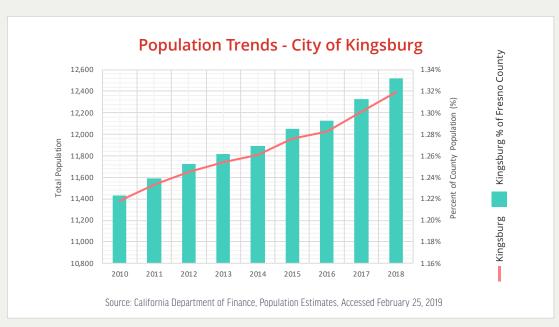
Inventory: 582,000 SF

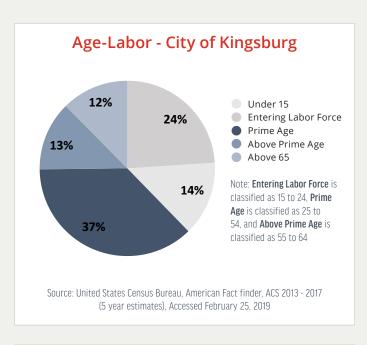
Vacancy Rate: 2.1%

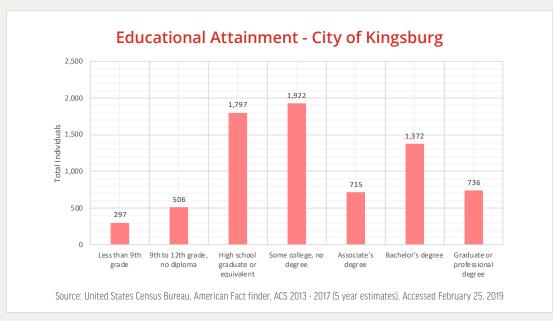
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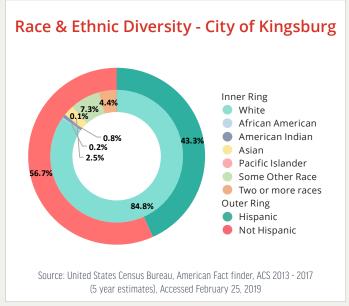










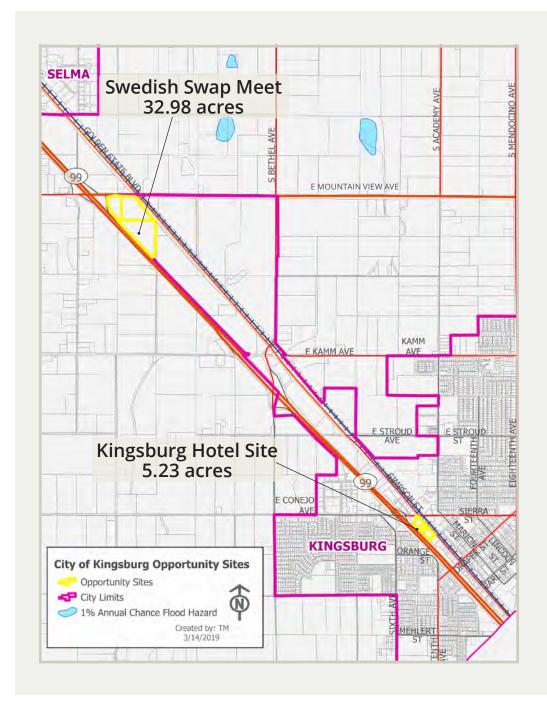


#### CITY OF KINGSBURG

## **OPPORTUNITY SITES**

Swedish Swap Meet Site » The site is located on the southeast corner of the East Mountain View Avenue and Highway 99 interchange. The property is home to a Sunday flea market that draws thousands of people. Off duty police and highway patrol officers are required to control traffic. The success of the flea market is testimony to the draw of this location. The Selma Crossing project, fully entitled for 3.2 million square feet of mixed use development, will occupy the other three corners of the interchange. The Flea Market site combined with Selma Crossing has the potential to support the emergence of a new regional center for employment, commerce, and residential development.

Kingsburg Hotel Site » Located near downtown Kingsburg's main Highway 99 interchange and within walking distance of city center, the 5.23 acre site is prime for hotel and commercial activities that support visitors to the community. The stretch of Simpson Street (Golden State Blvd.) between the site and downtown has undergone streetscape improvements and beautification aligning the property and downtown interests.



CITY OF KINGSBURG

SITE:

SWEDISH

SWAP MEET



#### SITE: SWEDISH SWAP MEET

## TRANSPORTATION & UTILITIES

#### **Transportation**

Swedish Swap Meet is served by East Mountainview Avenue and Golden State Blvd. Both roadways are suitable for industrial and commercial traffic. The Highway 99 interchange serving the area is at East Mountainview, adjacent to the property.

#### **Utilities**

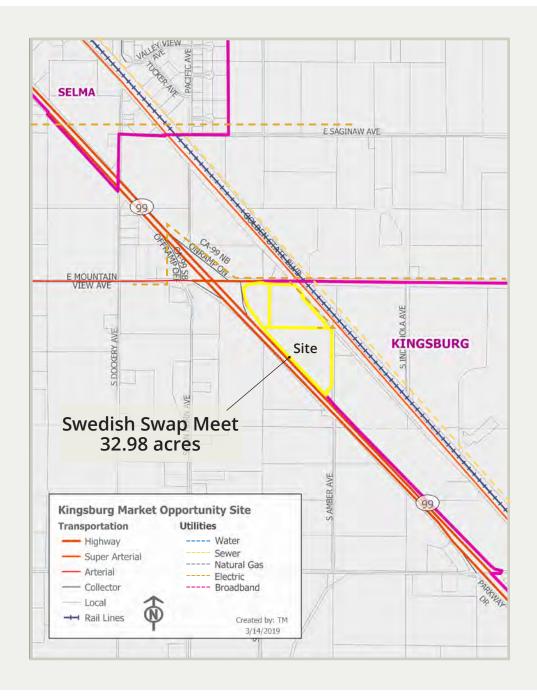
**Water** – Service provided by the City of Kingsburg via a 12" line.

**Sewer** – Service provided by SKF via an interceptor on east side of Golden State Blvd.

**Natural Gas** – Service provided by SoCal Gas via a 2" high-pressure main fed from the east along Mountain View.

**Electric** – 12kV service is at the site, provided by PG&E. Substation and circuit capacity are sufficient to meet near term needs.

**Broadband** - Service provided by Comcast.



#### SITE: SWEDISH SWAP MEET

## SITE DATA

#### **Strengths**

- Convenient access to Highway 99/Manning Avenue interchange, <.1 miles.</li>
- Water, wastewater, natural gas, broadband, and electric power are in proximity of the site and can support industrial operations.
- Upgrades to nearby wastewater interceptor lift stations that began in 2018 will be completed in 2022 and will increase allowed discharge from the property.
- Surrounding land uses are compatible with commercial and industrial development.
- The site offers visibility from Highway 99.
- The property is zoned Highway Commercial.

#### Weaknesses

➡ The Highway 99/Mountain View Avenue interchange is currently congested. Caltrans has prepared a feasibility study for short-term and long-term improvements.

#### FRESNO COUNTY OPPORTUNITY SITE(1)

#### SITE: Swedish Swap Meet

Address	SW Corner - E. Mountain View and S. Golden State Blvd.
City	Kingsburg, CA
Assessor Parcel Number (APN)	393-24-54, 393-24,55
Jurisdiction (City / County)	County (Kingsburg sphere of influence)
Opportunity Zone (Yes / No)	No
Ownership (Public / Private)	Private
Current Use	Weekly swap meet
Site Acreage / Developable Acres (est.)	32.98 / 32.98 (2.35 + 30.63)
Acreage within flood plain/floodway	0
Zoning	Highway Commercial
General Plan Designation	Heavy Industrial
Nearest Limited Access Highway / Distance	99 / .1 miles
Rail Access Available to Site	No
Electric Power Provider	PG&E
Circuit serving site (kV / location)	12 / McCall 1107 at site
Circuit kV capacity (total / peak load)	12.83 / 9.45
Substation dist. / kV capacity (total / peak)	miles / 44.55 / 31.7
Natural Gas Provider	SoCal Gas
Line serving site - location and size	2" high-pressure main fed from the east along Mountain View
Water Provider	City of Kingsburg
Line serving site - location and size	12" line
System capacity / average daily use (MGD)	Contact city for info
Wastewater Provider	Selma-Kingsburg-Fowler Sanitation District
Line serving site - location and size	Interceptor in Golden State Blvd. at site
Lift stations / force mains - location	Lift station upgrades underway
System capacity / average daily use (MGD)	8 MGD / 4 MGD
Broadband Provider	Comcast
Line serving site - location and capacity	Contact city for info
Development Status - EIR, CEQA, etc.	none
(1) Sites were identified by City/County officials in	conjunction with the consulting team as Opportunity Sites that alig

(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.



## SITE: SWEDISH SWAP MEET LAND USE

California Truck/Sales

Valero Gas Station

Selma Crossing Phase I

Golden State Utility

Shell Gas Station

TP Tire Store

Guardian Industries

Vie Del Winery

Sun Maid Raisins

#### **Surrounding Land Uses**

A concentration of commercial and industrial development is found east of Highway 99 and southeast of the Swap Meet site on both sides of Golden State Blvd. A large Guardian Industries glass container manufacturing facility is located directly east of the property.

#### SITE: SWEDISH SWAP MEET

## RECOMMENDATIONS

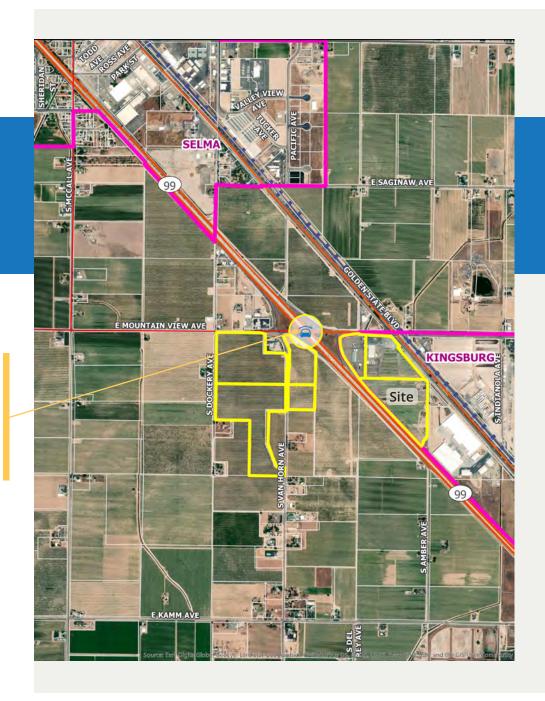
COMMUNITY: Kingsburg (sphere of influence)

**SITE: Swedish Swap Meet** 

CATALYST PROJECT – RECOMMENDED USE: Light industrial, highway commercial

### Investments required to ready property for market

- 1. Caltrans is studying the E. Mountain View Avenue/Highway 99 interchange. Six options have been proposed to address near and long term traffic congestion. Construction funding has not been allocated. Moving-up the timeline for improvements would expedite development at the interchange. City of Kingsburg and Selma officials should coordinate efforts to move interchange reconstruction forward.
- 2. Engineering and costs estimates are recommended for the connection of water, wastewater, natural gas and electric lines to the site.
- 3. A master plan that shows development alternatives and includes preliminary engineering and site preparation costs estimates is recommended. Site development alternatives should consider and compliment the Selma Crossing project.



CITY OF KINGSBURG

SITE: **HOTEL SITE** 



SITE: HOTEL SITE

## TRANSPORTATION & UTILITIES

#### **Transportation**

The site is located at the southwest corner of Sierra Avenue and Simpson Avenue (Golden State Blvd) and approximately 500 feet east of the Sierra Avenue/Highway 99 interchange. Sierra Avenue is the primary entrance to Kingsburg town center.

#### **Utilities**

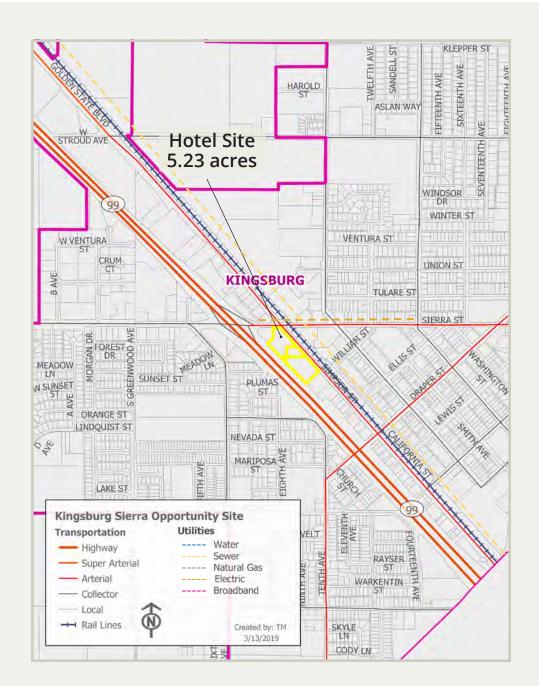
**Water** – Service provided by the City of Kingsburg via a 12" line.

**Sewer** – Service provided by SKF via a interceptor on east side of Golden State Blvd.

**Natural Gas** – Service provided by SoCal Gas via two mains on Sierra Street at that location, one 6" and one 10".

**Electric** – 12kV service is at the site, provided by PG&E. Substation and circuit capacity are sufficient to meet near term needs.

**Broadband** - Service provided by Comcast.



## SITE DATA

#### **Strengths**

- Convenient access to Highway 99/Sierra Avenue interchange.
- Proximate to a vibrant downtown business district.
- Water, wastewater, natural gas, broadband, and electric power are in proximity of the site and can support industrial operations.
- Upgrades to nearby wastewater interceptor lift stations that began in 2018 will be completed in 2022 and will increase allowed discharge from the property.
- Surrounding land uses are compatible with hotel, restaurant, and commercial operations.
- The site offers visibility from Highway 99.
- Roadway and landscape improvements have been completed for the section of Golden State Blvd serving the property.

#### Weaknesses

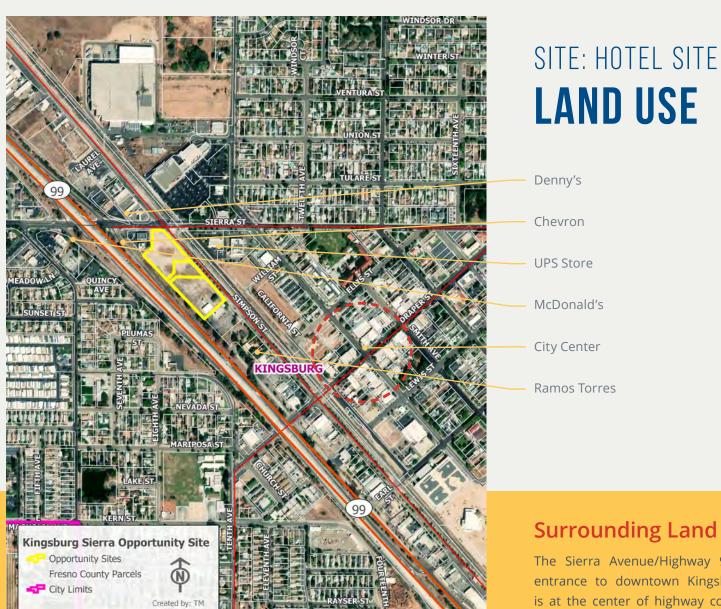
None noted.

#### FRESNO COUNTY OPPORTUNITY SITE(1)

#### SITE: Sierra Avenue Hotel Site

Address	SE Corner - Simpson and Sierra Ave
City	Kingsburg, CA
Assessor Parcel Number (APN)	395-050-38, 395-050-408, 395-050-42
Jurisdiction (City / County)	City
Opportunity Zone (Yes / No)	No
Ownership (Public / Private)	Private
Current Use	Vacant
Site Acreage / Developable Acres (est.)	5.23 / 5.23 (2.16 + .75 + 2.32)
Acreage within flood plain/floodway	0
Zoning	Central Commercial
General Plan Designation	High Density
Nearest Limited Access Highway / Distance	99 / .1 miles
Rail Access Available to Site	No
Electric Power Provider	PG&E
Circuit serving site (kV / location)	12 / Kingsburg 1112 at site
Circuit kV capacity (total / peak load)	13.6 / 9.3
Substation dist. / kV capacity (total / peak)	miles / 44.55 / 34.1
Natural Gas Provider	SoCal Gas
Line serving site - location and size	Two mains on Sierra Street at that location. One 6" steel, the other 10" steel
Water Provider	City of Kingsburg
Line serving site - location and size	12" line
System capacity / average daily use (MGD)	Contact city for info
Wastewater Provider	Selma-Kingsburg-Fowler Sanitation District
Line serving site - location and size	Interceptor in Golden State Blvd. at site
Lift stations / force mains - location	Lift station upgrades underway
System capacity / average daily use (MGD)	8 MGD / 4 MGD
Broadband Provider	Comcast
Line serving site - location and capacity	Contact city for info
Development Status - EIR, CEQA, etc.	none
(1) Citas wars identified by City/County officials in	a conjugation with the conculting team as Opportunity Citae that ali

(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.



#### **Surrounding Land Uses**

The Sierra Avenue/Highway 99 interchange is the primary entrance to downtown Kingsburg. The immediate site area is at the center of highway commercial, retail and restaurant operations.

#### SITE: HOTEL SITE

## **RECOMMENDATIONS**

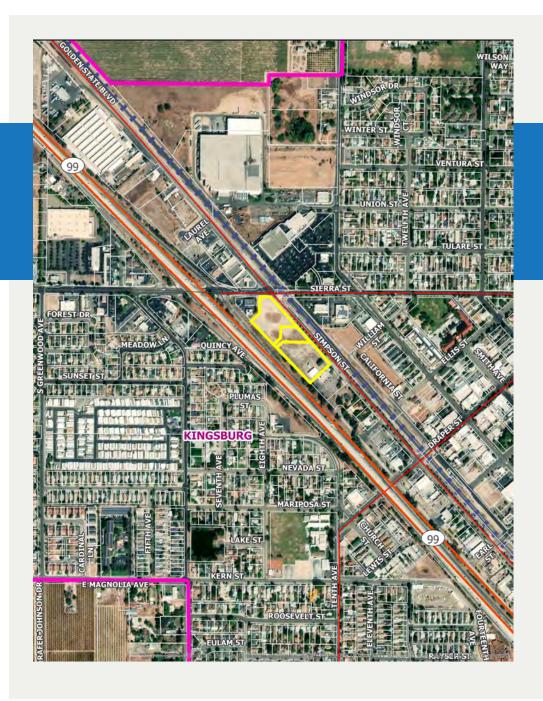
COMMUNITY: Kingsburg

SITE: Hotel Site

CATALYST PROJECT - RECOMMENDED USE: Hotel, commercial services, retail

### Investments required to ready property for market

1. A master plan that shows development alternatives that best align with downtown promotion is recommended. From this, RFPs can be developed to solicit development partners.



CITY OF SELMA

#### CITY OF SELMA

## CITY PROFILE

#### **CITY CONTACT:**

Teresa Gallavan, City Manager teresag@cityofselma.com (559) 891-2200

#### **Community Projects**

**Selma Crossing Commercial Center** – Phased build out of 287 acres over 15-20 years

**Selma Grove Shopping Center** – 869,093 SF planned power retail center

**Amberwood** – Master Plan for 2,560 housing units, 130,000 SF commercial space, 100 acres.



#### INDUSTRIAL SPACE

Inventory: 892,000 SF

Vacancy Rate: 17.6%

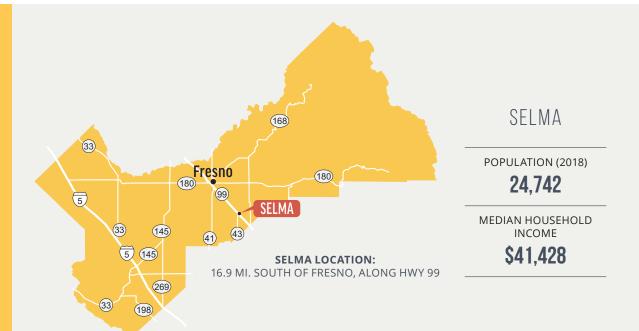


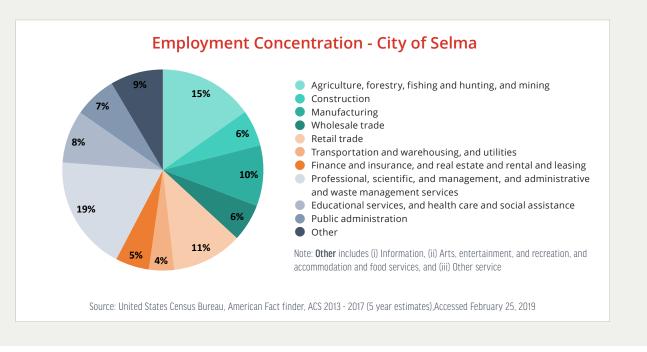
#### **RETAIL SPACE**

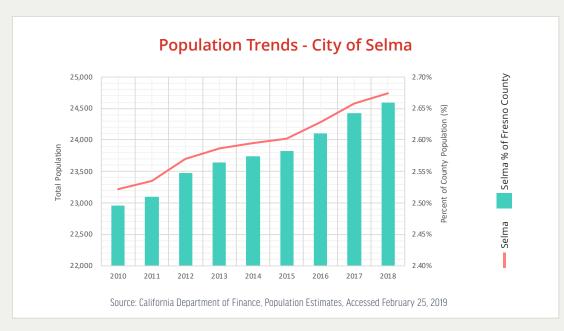
Inventory: 1.8M SF

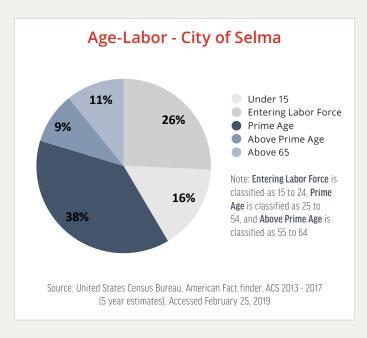
Vacancy Rate: 1.7%

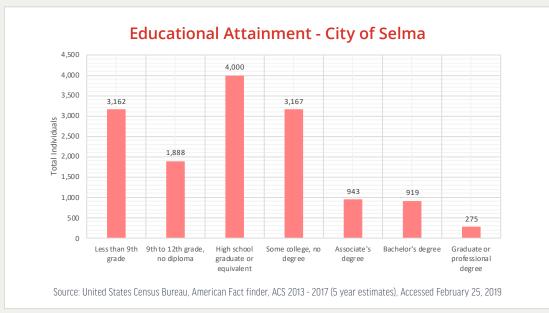
Space Source: CoStar Analytics. Accessed July 2019.

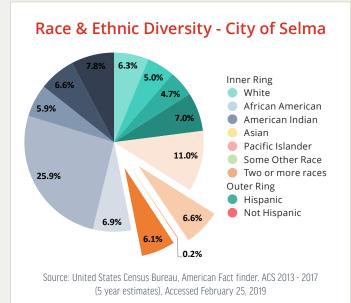










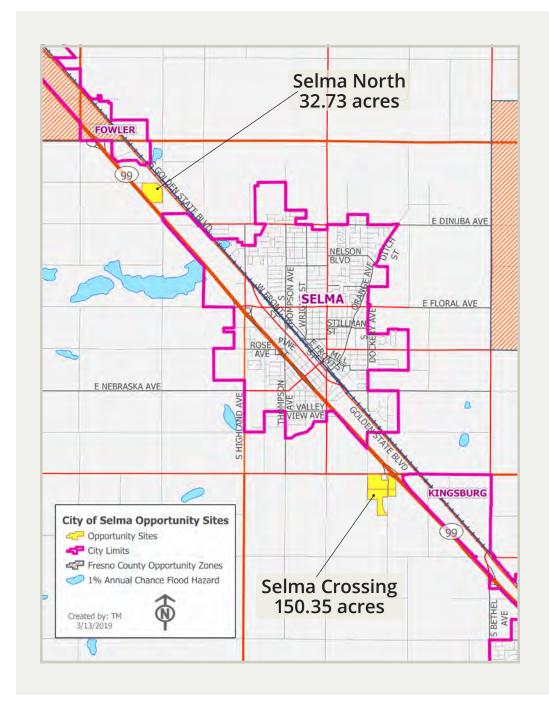


#### CITY OF SELMA

## **OPPORTUNITY SITES**

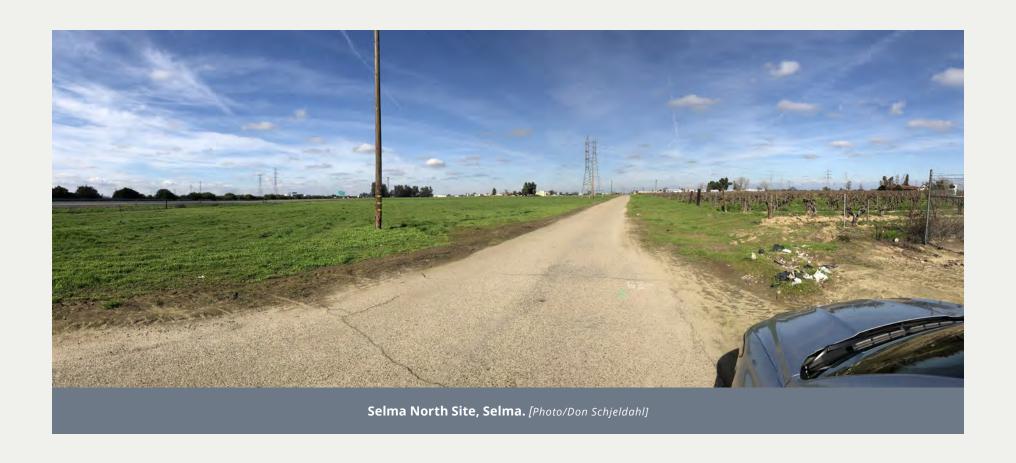
Selma North » The City of Selma sphere of influence touches the City of Fowler just south of Manning Avenue. Industrial and commercial development is clustered around Manning, Golden State Blvd. and Highway 99. Development continues to push out to the north, east, and south from the interchange. The Selma North site offers a low barrier to development. Development of this site would likely provide a catalyst for neighboring vacant parcels.

Selma Crossing » Selma Crossing, a 278-acre master planned project, is slated for the NE, NW, and SW corners of E Mountainview Road and Highway 99. Selma Crossings will be built in three phases and include retail, commercial, light industrial, office, and residential uses. The project, originating prior to the great recession, is fully entitled for 3.2 million square feet of development. Selma Crossing has the potential to be the catalyst for new center for employment, commerce, and residential development.



CITY OF SELMA

SITE:
SELMA NORTH



## TRANSPORTATION & UTILITIES

#### **Transportation**

The North Selma property is served DeWolf Avenue via an intersection with Golden State Blvd. Access to Highway 99 is 1.1 miles via Golden State and Manning Avenue. Roads are in good condition and can support industrial traffic.

#### **Utilities**

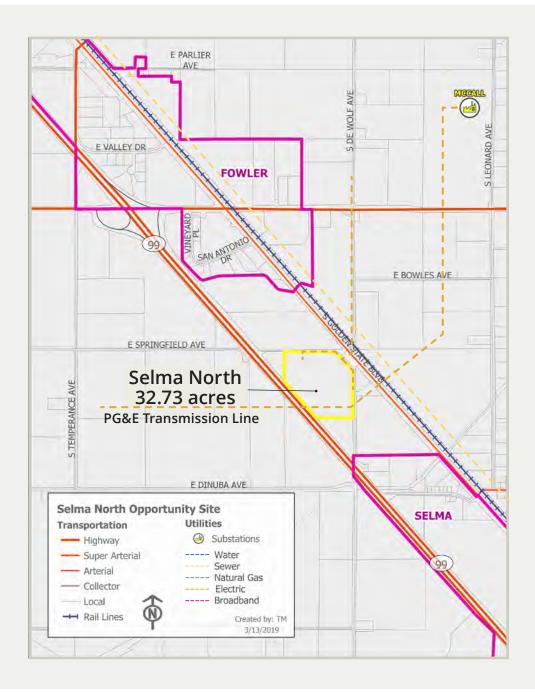
Water – Service provided by City of Selma via 12" line.

**Sewer** – Service provided by SKF via an interceptor on east side of Golden State Blvd.

Natural Gas – Service provided by PG&E.

**Electric** – 12kV service is at the site, provided by PG&E. Transmission lines cut across southern section of property. Substation and circuit capacity are sufficient to meet near term needs.

**Broadband** - Service provided by AT&T.



### SITE DATA

#### **Strengths**

- Convenient access to Highway 99/Manning Avenue interchange.
- Caltrans is currently evaluating the interchange as part of an EIR process for a proposed travel center located at the northeast quadrant of SR 969/Manning interchange.
- Water, wastewater, natural gas, broadband, and electric power are in proximity of the site and can support industrial operations.
- Upgrades to nearby wastewater interceptor lift stations that began in 2018 will be completed in 2022 and will increase allowed discharge from the property.
- Electric primary service from a high voltage transmission line is possible at this location.
- Surrounding land uses are compatible with industrial operations.
- The site offers visibility from Highway 99.
- Selma General Plan designates the property as Light Industrial Reserve.
- Plans are underway for the nearby travel center/hotel project that will generate a 20 year traffic study and a level of environmental review for surrounding area that can be leveraged at this property.

#### Weaknesses

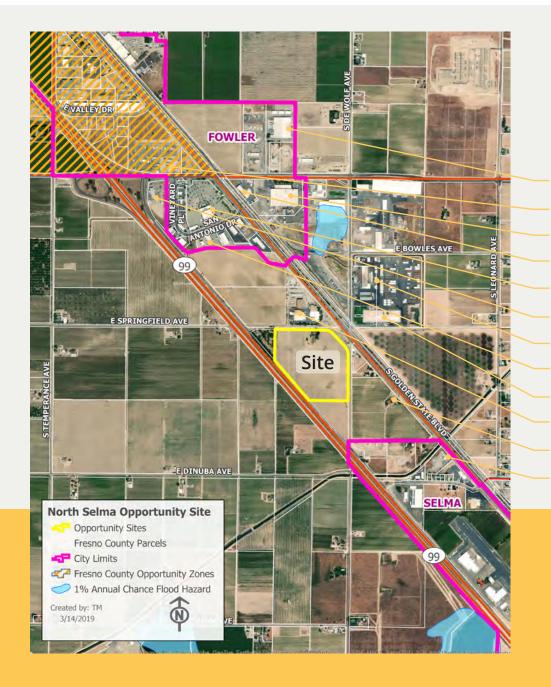
- A PG&E high voltage transmission cuts across the property restricting development on southern most acreage.
- The Highway 99/Manning Avenue interchange is currently congested and will see more traffic with planned development of a large truck stop. Caltrans has the interchange slated for a major upgrade.

#### FRESNO COUNTY OPPORTUNITY SITE(1)

#### SITE: Selma North

Address	7847 E. Springfield Ave
City	Selma, CA
Assessor Parcel Number (APN)	34806011
Jurisdiction (City / County)	County
Opportunity Zone (Yes / No)	No
Ownership (Public / Private)	Private
Current Use	Agriculture, light and heavy industrial
Site Acreage / Developable Acres (est.)	32.73 / 32.73
Acreage within flood plain/floodway	None
Zoning	LIMITED AGRICULTURAL (AL20)
General Plan Designation	LIGHT INDUSTRIAL RESERVE
Nearest Limited Access Highway / Distance	Highway 99 / 1.1 mile
Rail Access Available to Site	None
Electric Power Provider	PG&E
Circuit serving site (kV / location)	12 / McCall 1105 at site 230 / Helm-McCall at site 115 / California Ave-McCall at site
Circuit kV capacity (total / peak load)	12.19 / 10.48
Substation dist. / kV capacity (total / peak)	miles / 44.55 / 31.7
Natural Gas Provider	PG&E
Line serving site - location and size	4" high pressure running down Floral
Water Provider	City of Selma
Line serving site - location and size	12", terminates on Selma Toyota site
System capacity / average daily use (MGD)	Contact Cal Water
Wastewater Provider	Selma-Kingsburg-Fowler Sanitation District
Line serving site - location and size	Interceptor in Golden State Blvd. at site
Lift stations / force mains - location	Lift station upgrades underway
System capacity / average daily use (MGD)	8 MGD / 4 MGD
Broadband Provider	AT&T
Line serving site - location and capacity	n/a
Development Status - EIR, CEQA, etc.	None
(1) Sites were identified by City/County officials in	conjunction with the consulting team as Opportunity Sites that alig

(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.



## LAND USE

**PPS Packaging** 

Star Mart Truck Stop

Palogix/Seaca Packaging

JB Hunt Transport

The Worship Center

Sunny Truck Wash

Lion Raisin

Mixed Light Industrial

Star Transport

Fresno Valve & Castings

Golden State Vineyards

Golden State Truck Repair

#### **Surrounding Land Uses**

The North Selma Site area has a heavy concentration of packaging, logistics, and mixed light industrial operations, many focused on grapes and raisin products. The former casino at Manning Ave and Golden State is now a mega-church. Agricultural land in this area is gradually converting to industrial/commercial use.

## RECOMMENDATIONS

COMMUNITY: Selma

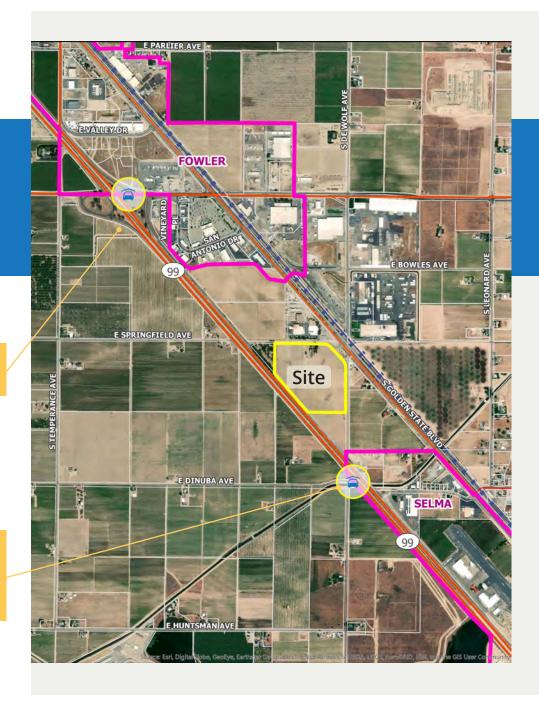
SITE: Selma North

CATALYST PROJECT - RECOMMENDED USE:

Mixed use development (light industrial, office, retail)

### Investments required to ready property for market

- 1. City of Fowler is currently processing the EIR to identify potential opening day and future improvements required at the Manning Avenue/Highway 99 interchange. Moving up the timeline for improvements would expedite development in this area.
- 2. Engineering and costs estimates are recommended for the connection of water, wastewater, natural gas and electric lines to the site.
- 3. A master plan for development within Selma's sphere of influence east of Highway 99, west of Golden State, and south of City of Fowler boundary would help ensure development in the area would provide maximum benefits to the community.
- 4. Selma community leaders have asked Caltrans to explore a new Highway 99 interchange at E. Dinuba Ave. The belief is an interchange here would reduce traffic pressure at the Highway 99 interchange at Highland/Floral. A Dinuba interchange would also accelerate development in this area.
- 5. Utilize traffic study and impending plans generated by travel center/hotel site to the north to incorporate in the value proposition for the property and surrounding parcels.



CITY OF SELMA

SITE:

## SELMA CROSSING PHASE II



#### SITE: SELMA CROSSING PHASE II

## TRANSPORTATION & UTILITIES

#### **Transportation**

Selma Crossing Phase II is served East Mountainview Avenue and South Dockery Avenue. Mountainview is an arterial road and Dockery is a light duty collector. The Highway 99 interchange serving the area is at East Mountainview, adjacent to the property.

#### **Utilities**

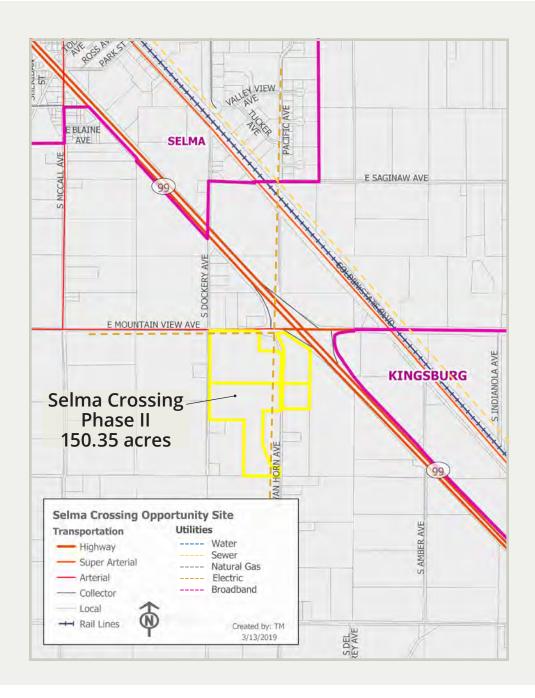
**Water** – A new well near the corner of Dockery and Mountain View will serve Phase II along with a line extended under Highway 99 from Phase I.

**Sewer** – Sewer service is ½ mile to the east across Golden State Blvd. A lift station and a line extension are needed. Estimated cost to bring sewer service is \$2.2 million.

Natural Gas – Service provided by PG&E.

**Electric** – 112kV service is at the site, provided by PG&E. Substation and circuit capacity are sufficient to meet near term needs.

**Broadband** - Contact city for more info.



## SITE: SELMA CROSSING PHASE II SITE DATA

#### **Strengths**

- Convenient access to the Highway 99/E. Mountain View Avenue interchange.
- Upgrades to nearby wastewater interceptor lift stations that began in 2018 will be completed in 2022 and will increase allowed discharge from the property.
- Surrounding land uses are compatible with light industrial and commercial operations.
- The site offers visibility from Highway 99.

#### Weaknesses

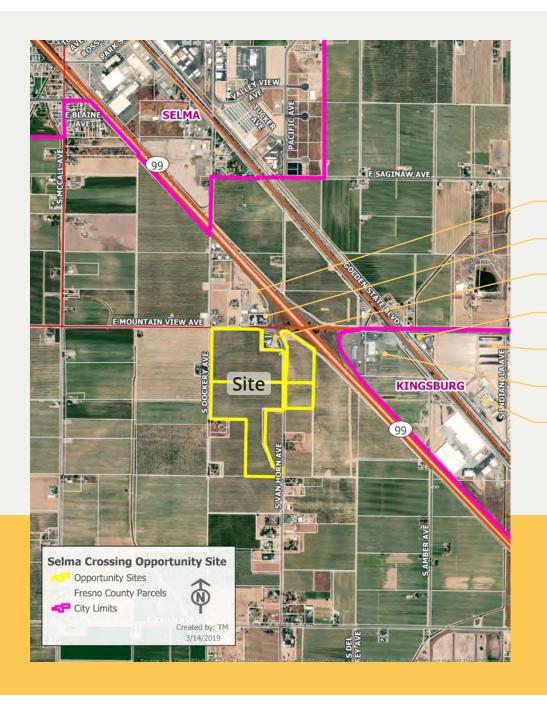
- Water, wastewater, natural gas, broadband, and electric power must be extended to the property.
- The Highway 99/Mountainview Avenue interchange is currently congested. Caltrans has the interchange slated for a major upgrade.

#### FRESNO COUNTY OPPORTUNITY SITE(1)

#### SITE: Selma Crossing Phase II

Address	SW Corner - Highway 99 and E. Mountain View
City	Selma, CA
Assessor Parcel Number (APN)	393-102-72, 393-102-20, 393-102-34, 393-102-23S, 393-102-65, 393-240-27
Jurisdiction (City / County)	County
Opportunity Zone (Yes / No)	No
Ownership (Public / Private)	Private
Current Use	Agriculture
Site Acreage / Developable Acres (est.)	150.35 / Usable? (32.99+33.13+12.25+20.0+35.45+16.53)
Acreage within flood plain/floodway	
Zoning	Regional Commercial
General Plan Designation	Highway Commercial
Nearest Limited Access Highway / Distance	99 / .2 miles
Rail Access Available to Site	No
Electric Power Provider	PG&E
Circuit serving site (kV / location)	12 / Kingsburg 1114 at site
Circuit kV capacity (total / peak load)	12.19 / 6.22
Substation dist. / kV capacity (total / peak)	miles / 44.55 / 34.1
Natural Gas Provider	PG&E
Line serving site - location and size	Unknown
Water Provider	City of Selma
Line serving site - location and size	12", terminates @ Saginaw/Gldn St
System capacity / average daily use (MGD)	Contact Cal Water
Wastewater Provider	Contact city for info
Line serving site - location and size	42" main trunk on Gldn St
Lift stations / force mains - location	Contact SKF
System capacity / average daily use (MGD)	Contact SKF
Broadband Provider	Contact city for info
Line serving site - location and capacity	n/a
Development Status - EIR, CEQA, etc.	Documents in annexation folder
(1) Sites were identified by City/County officials in	conjunction with the consulting team as Opportunity Sites that align

(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.



## SITE: SELMA CROSSING PHASE II LAND USE

California Truck/Sales

Valero Gas Station

Shell Gas Station

TP Tire Store

**Guardian Industries** 

Swedish Swap Meet

Vie Del Winery

#### **Surrounding Land Uses**

A concentration of commercial and industrial development is found east of Highway 99 and south of Mountainview Ave along Golden State Blvd. Land west of Highway 99 has remained largely agriculture due to a lack municipal water and sewer infrastructure.

#### SITE: SELMA CROSSING PHASE II

## RECOMMENDATIONS

COMMUNITY: Selma

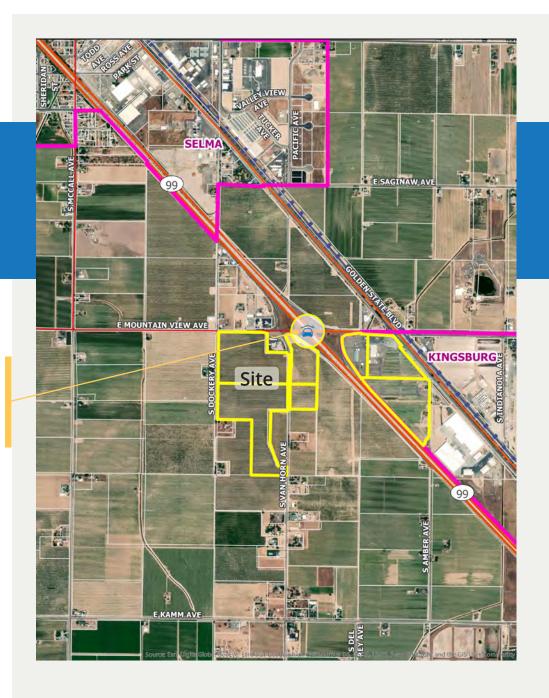
**SITE: Selma Crossing Phase II** 

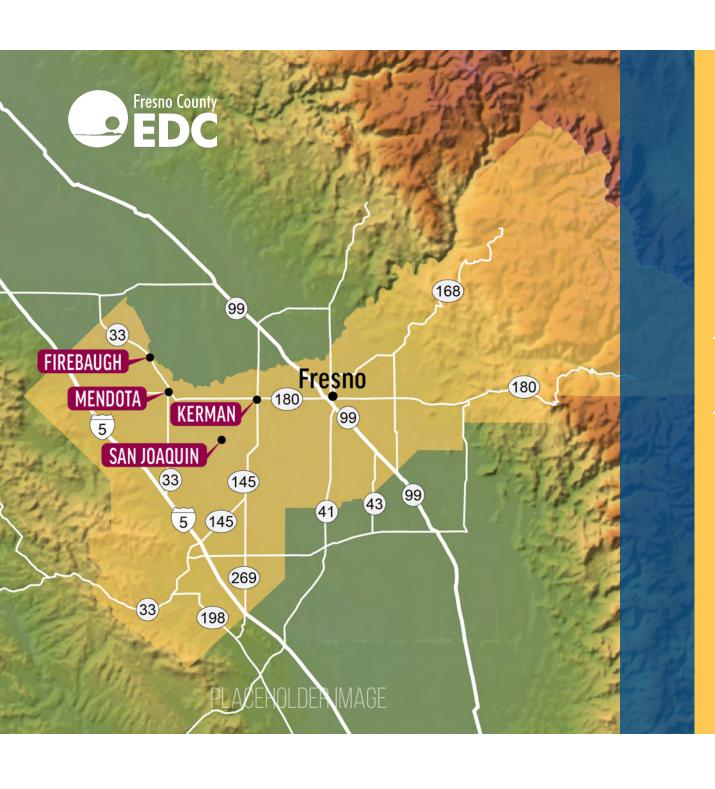
CATALYST PROJECT – RECOMMENDED USE:

Mixed use development (light industrial, office, retail)

### Investments required to ready property for market

- 1. Caltrans is studying the E. Mountainview Avenue/Highway 99 interchange. Six options have been proposed to address near and long term traffic congestion. Construction funding has not been allocated. Moving-up the timeline for improvements would expedite Phase II development.
- 2. Water and sewer line extensions are required before any significant land development can occur in Phase II. The estimated cost for a sewer line and lift station is \$2.2 million. In addition, 450' of 14" water main is needed.
- 3. The three phase Selma Crossing development is entitled for up to 3.4 million square feet of commercial, office and mixed-use. Industrial development is not specifically addressed in current plans. Consideration should be given incorporation in Phase II of industrial and distribution operations in keeping with investment trends in the region.





# FRESNO COUNTY OPPORTUNITY ANALYSIS

FRESNO WESTSIDE

FIREBAUGH KERMAN MENDOTA SAN JOAQUIN

SEPTEMBER 2019 ]

# FRESNO WESTSIDE

#### **Recent Announcements**

**FIREBAUGH** - West Hills College Expansion. Upgrade from 11,000 SF facility to 48,000 SF facility with new Fresno County Library. This \$44.1m project begins construction in late 2019.



#### **INDUSTRIAL SPACE**

Inventory: 3.0M SF

Vacancy Rate: 0.4%

Space Pipeline: **negligible** 



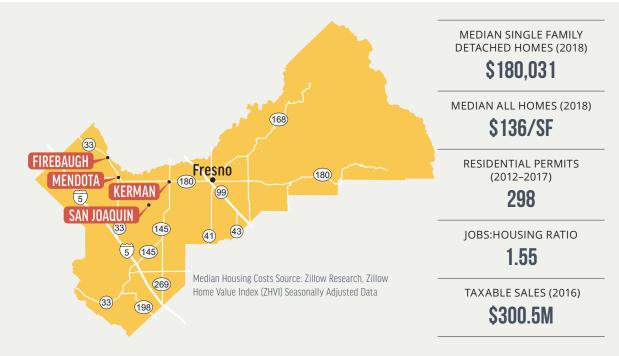
#### **RETAIL SPACE**

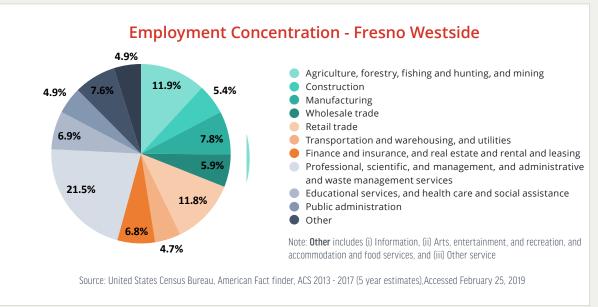
Inventory: 1.2M SF

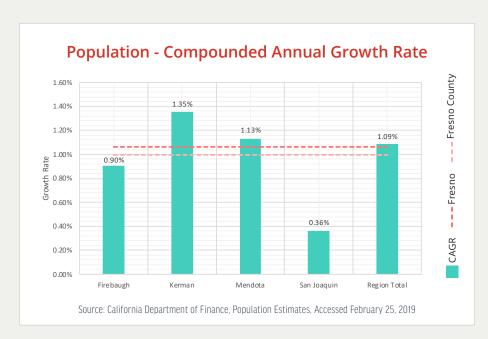
Vacancy Rate: 2.6%

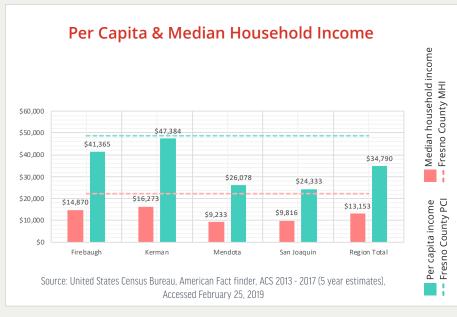
Space Pipeline: **negligible** 

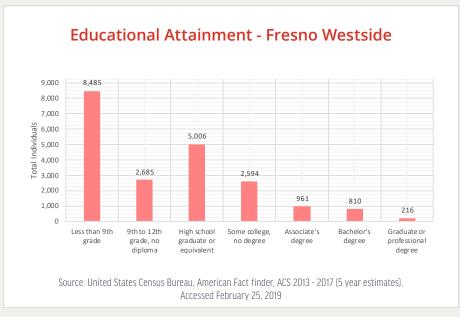
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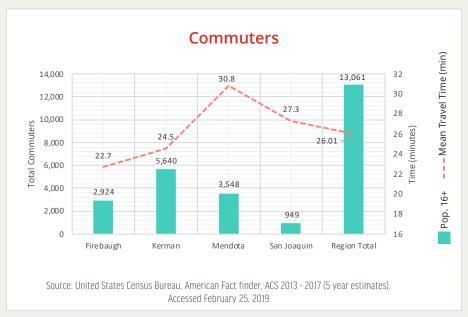














## SITE SELECTOR INSIGHTS

## FRESNO WESTSIDE

- The economies of Fresno County's westside communities are undergoing a slow but steady shift from traditional agricultural activities to new industries or sectors.
- Regulatory change, shifting markets, adoption of automation, and urban sprawl are among the forces impacting the region.
- Water management initiatives have dramatically reduced the amount of land in cultivation. At the same time sugar beets and boxed vegetables have been replaced with orchard crops over the last few decades. Combined, these events have lessened the demand for workers.
- Areas closest to Fresno are feeling the influence of urban expansion. Kerman has seen the greatest shift with new housing and shopping investments showing steady growth in recent years.
- Economic opportunities would seem to still exist with the advancement of modern manufacturing, ag processing, and ag services that align with the changing economy.

TABLE 2
Economic Forces and Opportunities in Fresno Westside Communities

Economic Forces and the Availability of Developable Land		Catalyst Project Opportunities
A shift in the mix of crops being produced on the westside has changed the overall economy for ag processing and ag services. At the same time, water management initiatives have dramatically reduced the amount of land in cultivation. Increased use of automation in ag and the switch to orchard crops have created the need for new development opportunities. Areas closest to Fresno (Kerman) are feeling the influence of urban expansion.	Kerman	Manufacturing, ag services, downtown redevelopment
	Firebaugh	Manufacturing, ag processing, ag services
	Mendota	Manufacturing, ag processing, ag services
	San Joaquin	Manufacturing, ag services, ag chemicals

FRESNO WESTSIDE

FIREBAUGH

# CITY OF FIREBAUGH CITY PROFILE

#### **CITY CONTACT:**

Ben Gallegos, City Manager bgallegos@ci.firebuagh.ca.us (559) 659-2043

#### **Community Projects**

**Industrial Infrastructure** – Plans to provide water, sewer, storm drainage to 40 acres of industrial land at Highway 33 & Bullard.



#### INDUSTRIAL SPACE

Inventory: 586,000 SF

Vacancy Rate: 0%

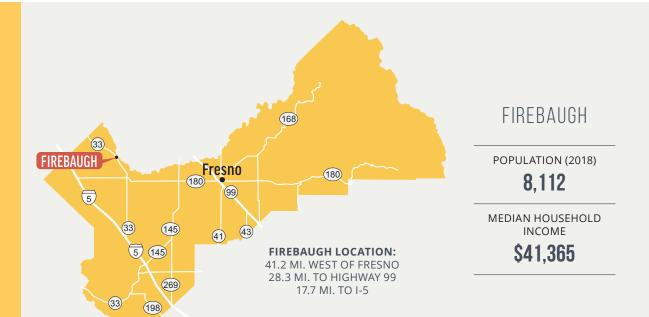


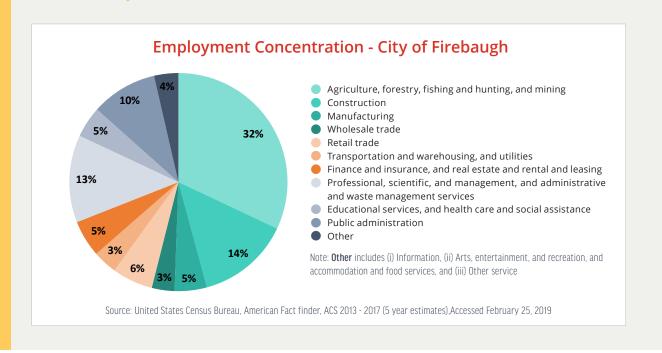
#### **RETAIL SPACE**

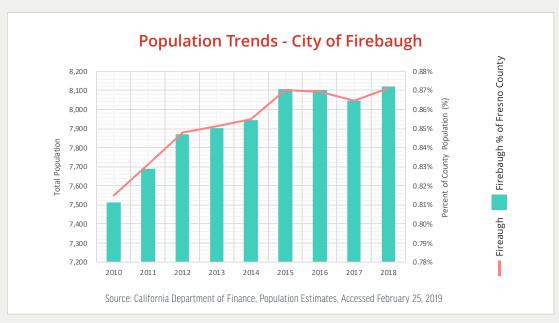
Inventory: 200,000 SF

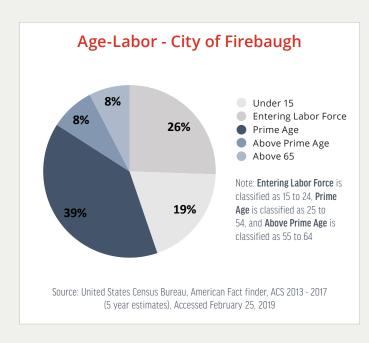
Vacancy Rate: 0.2%

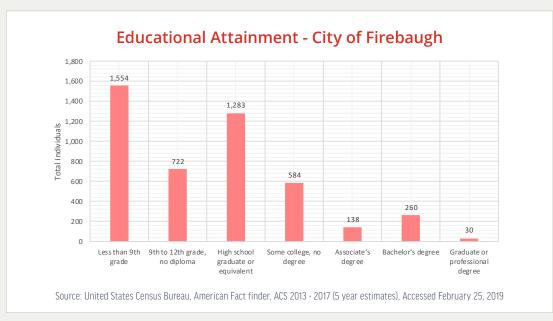
Space Source: CoStar Analytics. Accessed July 2019.

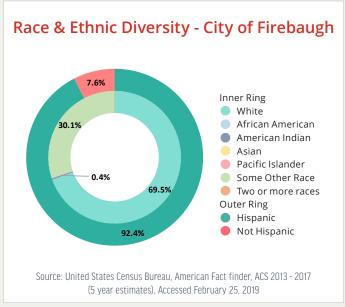










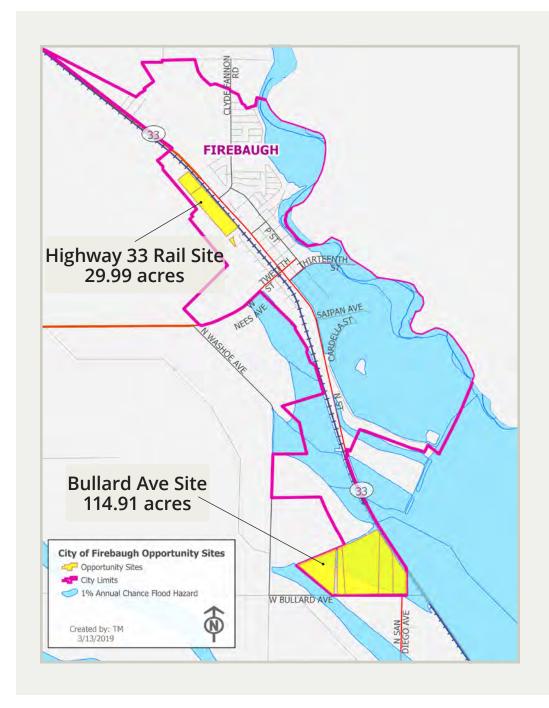


## CITY OF FIREBAUGH

# **OPPORTUNITY SITES**

Highway 33 Rail Site » The mix of companies operating in Firebaugh's agriculture dominated economy has changed in recent decades. Gone are the boxed fruit and vegetable packing houses that once stretched along the rail tracks from one end of town to the other. Also absent is sugar production from sugar beets grown locally. The 29.99 acre Highway 33 Rail Site, owned by the City of Firebaugh, was formerly home to packing houses. The narrow rectangular site is flat, well drained, and clear of any structures. The property is located on the west side of Highway 33 near Firebaugh town center. A San Joaquin Valley Railroad (SJVRR) rail line separates the site from Highway 33. An irrigation channel makes up the site's western boundary.

Bullard Avenue Site >> The 114+/- acre Bullard Avenue property, located within the city, has 2,000+ feet of frontage on Highway 33. Approximately 70 acres closest to Highway 33 are in a 100 year flood plain. The property is zoned M2 General Commercial District and designated as Heavy Industrial in the General Plan. Ag chemical company Simplot Ag Solutions is located adjacent to the site on the SE corner.

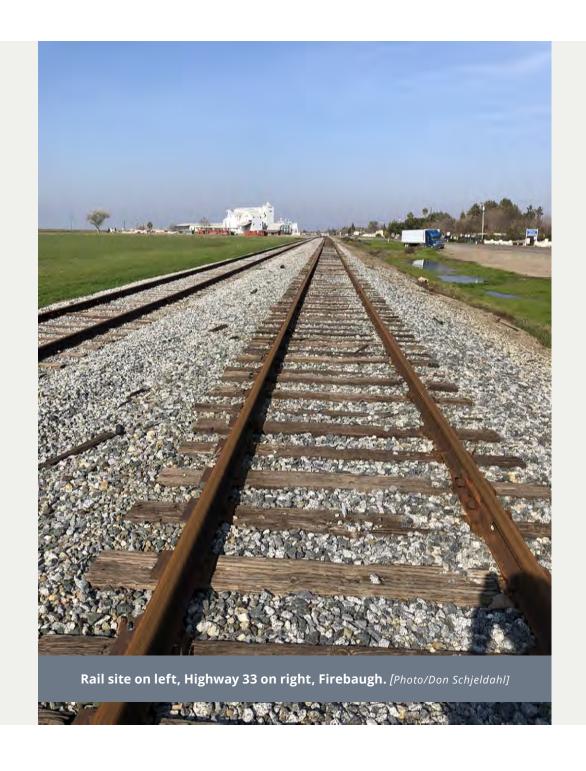


FRESNO WESTSIDE

CITY OF FIREBAUGH

SITE:

HIGHWAY 33



SITE: HIGHWAY 33

# TRANSPORTATION & UTILITIES

### **Transportation**

The site currently has no road access. A grade level crossing from Highway 33 is required. The nearest existing grade level crossing is on the W.C. Davis Farms ag facility immediately to the northwest of the site.

### **Utilities**

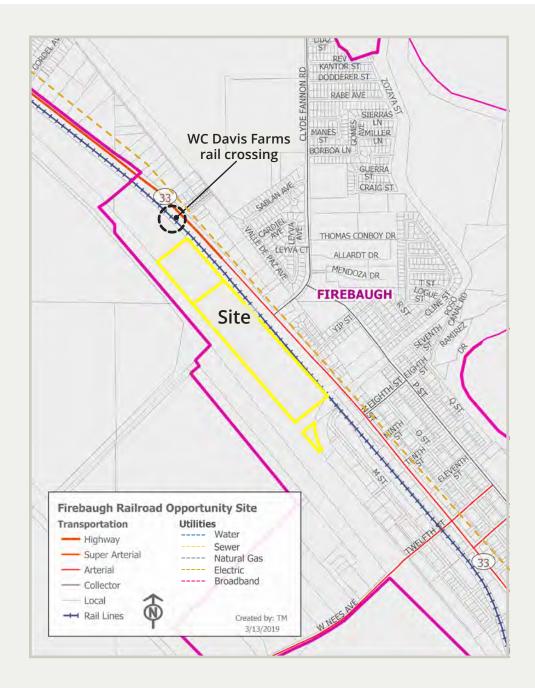
**Water** – Service will be provided by the City of Firebaugh via a 6" line.

**Sewer** – Service will be provided by the City of Firebaugh.

Natural Gas – Service provided by PG&E.

**Electric** – 12kV service is at the site, provided by PG&E. Substation and circuit capacity are sufficient to meet near term needs.

**Broadband** - Service provided by AT&T, Comcast.



## SITE: HIGHWAY 33

## SITE DATA

## **Strengths**

- Property is rail served.
- Water, wastewater, natural gas, broadband, and electric power are in proximity of the site and can support industrial operations.
- The property is flat and out the flood zone.
- The property is city owned and can be offered at a competitive price for the right project.
- The section of Highway 33 within the City of Firebaugh will soon undergo repaving along with streetscape improvements.
- Highway 33 is scheduled for major road rehabilitation project within the next few years.

#### Weaknesses

- With no road access, a grade level crossing of SJVRR tracks is required. SJVRR may be reluctant to approve a crossing due to two track rail siding that is used. Rail crossing costs could be \$500,000 or more.
- Water, sewer, and natural gas utility lines will need to be extended under the SJVRR tracks.
- The site is a long and narrow rectangle thereby limiting operations suitable for this property.

#### FRESNO COUNTY OPPORTUNITY SITE(1)

## SITE: Highway 33 Rail

ighway 33 at Clyde Fannon Drive irebaugh, CA  08-02-061 ity  0  ublic acant (formerly packing house)  9.99 / 29.99  II I-1 Light Manufacturing District
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G&E
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5MGD
T&T, Comcast
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(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.



## **Surrounding Land Uses**

The property sits in a transition zone between commercial/ residential development and rural agriculture. Separating the site from urban development is Highway 33 and the SJVRR rail

## SITE: HIGHWAY 33

# RECOMMENDATIONS

COMMUNITY: City of Firebaugh

SITE: Highway 33 Rail Site

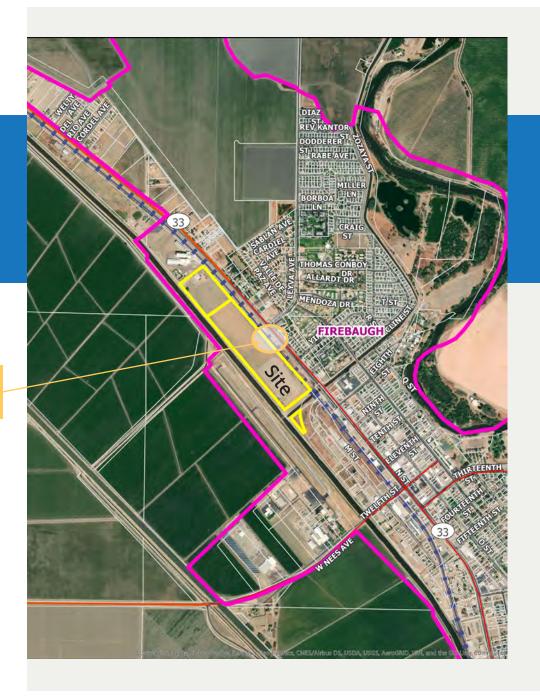
RECOMMENDED USE:

Light industrial, commercial services, transload

services

## Investments required to ready property for market

- 1. A grade level crossing of the SSJVRR rail line is needed to provide access to the property. The city has proposed a crossing at the Clyde Fannon Drive intersection.
- 2. Extensions of water, sewer, electric, natural gas, and broadband utility lines from Highway 33 to the site are needed. Preliminary engineering and costs estimates are recommended for the these connections.
- 3. A master plan that shows development alternatives and includes preliminary engineering and site preparation costs estimates for reactivation of the rail line is recommended.
- 4. While limitations remain, the site may be commercially viable for a truck-to-rail transload facility and may find cooperation from SJVRR to allow a grade crossing if such a rail use customer is identified.
- 5. Consider alternatives such as securing a road easement through adjacent W.C. Davis property to access their grade crossing.



FRESNO WESTSIDE

CITY OF FIREBAUGH

SITE:

**BULLARD AVENUE** 



**Bullard Site, looking north, Tomatek in background - Firebaugh.** [Photo/Don Schjeldahl]

# TRANSPORTATION & UTILITIES

### **Transportation**

Access to the property is via Bullard Avenue. There is a left turn lane at Bullard Avenue for Highway 33 north bound traffic. Rail tracks parallel the sites eastern boundary. Rail service may be available.

#### **Utilities**

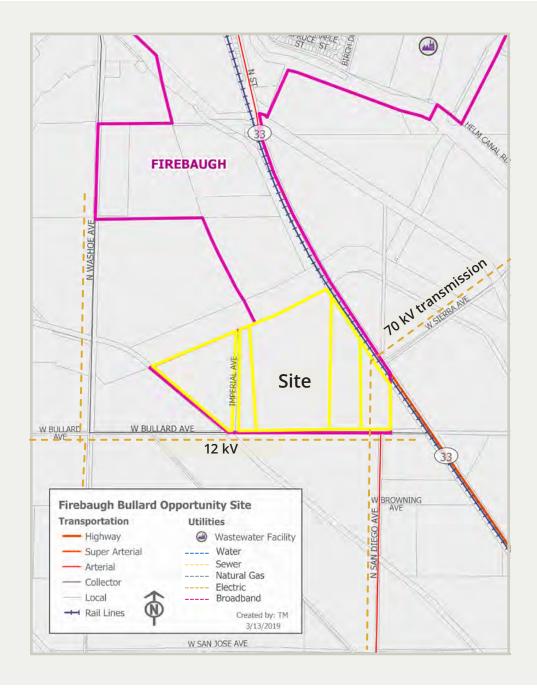
**Water** – Service provided by the City of Firebaugh via a 8" line.

**Sewer** – Service to the site will be provided by the City of Firebaugh. A line extension is needed from a lift station located at the SE corner of the Tomatek property.

Natural Gas – Service provided by PG&E.

**Electric** – 12kV service is at the site, provided by PG&E. Substation and circuit capacity are sufficient to meet near term needs. A 70kV transmission line borders the eastern side of the property and may be available for primary service.

**Broadband** - Contact city for info.



## SITE DATA

### **Strengths**

- The property is rail served.
- Water, natural gas, broadband, and electric power are in proximity of the site and can support industrial operations.
- Electric primary service from a high voltage transmission line is possible at this location.
- Surrounding land uses are compatible with industrial operations.
- The property is in the city and properly zoned for industrial development.

#### Weaknesses

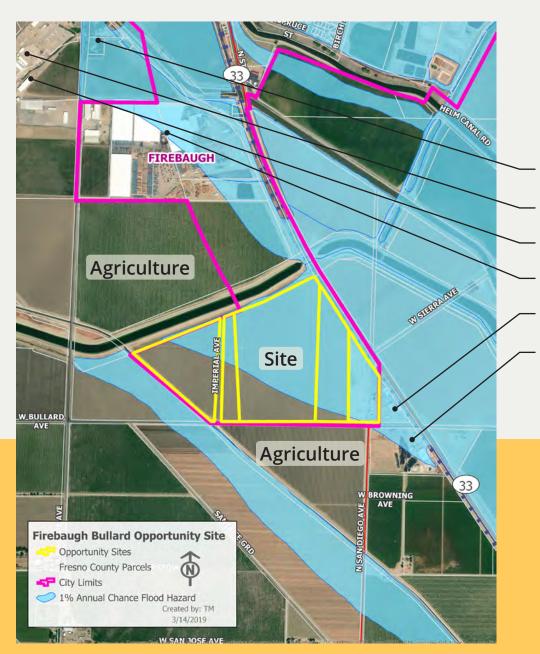
- Approximately 60% of the property is in a 100 year flood plain.
- The waste water lift station on the Tomatek property will require a capacity upgrade to support development of the property.
- Utility and roadway easements may be present limiting full development of the site.

#### FRESNO COUNTY OPPORTUNITY SITE(1)

#### SITE: Bullard Avenue

35850 W. Bullard Avenue
Firebaugh, CA
012-03-10, 012-03-10
City
No
Private
Agriculture
114.91 / 114.91 (73.45+ 40.56)
Contact city for info
M-2 General Commercial District
Heavy Industrial
1-5 / 20 miles
None
PG&E
12 / FIREBAUGH 1103 at site 70 / Oro Loma-Mendota at site
10.46 / 4.15
miles / 29.7 / 17.4
PG&E
Contact city for info
City of Firebaugh
8" [confirm line at site]
Contact city for info
City of Firebaugh
Contact city for info
Contact city for info

(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.



# LAND USE

**Britton Trucking** 

Nutrien Ag Solutions

Perez Packaging

Tomatek

Simplot Ag Solutions

Sun International

## **Surrounding Land Uses**

Firebaugh City limits incorporate agricultural land located south of urban development and west of Highway 33. The large Tomatek complex is separated from the Bullard Avenue site by an agricultural field. The land is reportedly being held by Tomatek for possible future expansion. Other industrial operations are located at the SE corner of the Bullard Avenue site and west of Tomatek. These later operations are in the county.

# RECOMMENDATIONS

COMMUNITY: City of Firebaugh

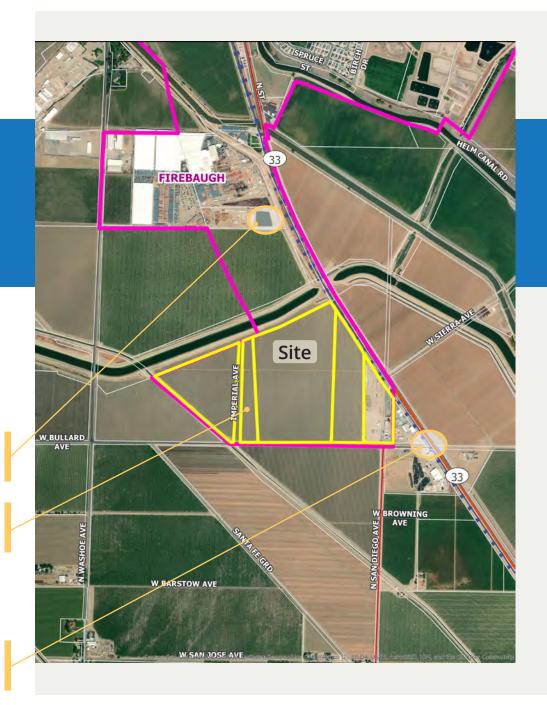
**SITE: Bullard Avenue Site** 

**RECOMMENDED USE:** 

Light and heavy industrial, distribution

## Investments required to ready property for market

- 1. Preliminary engineering and costs estimates are recommended for the connection of water, wastewater, natural gas and electric lines to the site.
- 2. A capacity upgrade to the city's wastewater lift station on the Tomatek property will likely be required to support development of the Bullard Avenue site.
- 3. A master plan that shows development alternatives and includes preliminary engineering, rail development, and site preparation costs estimates is recommended.
- 4. The possible presence of utility and roadway easements are indicated on some aerial maps. Their presence could restrict property development. Further information is needed.
- 5. A traffic study is recommended to determine if the Highway 33 at Bullard Avenue intersection can support industrial development of the property.



# FRESNO WESTSIDE KERMAN

# CITY OF KERMAN CITY PROFILE

#### **CITY CONTACT:**

John Kunkel, City Manager jkunkel@cityofkerman.org (559) 846-9384



#### INDUSTRIAL SPACE

Inventory: **910,000 SF** 

Vacancy Rate: 0%

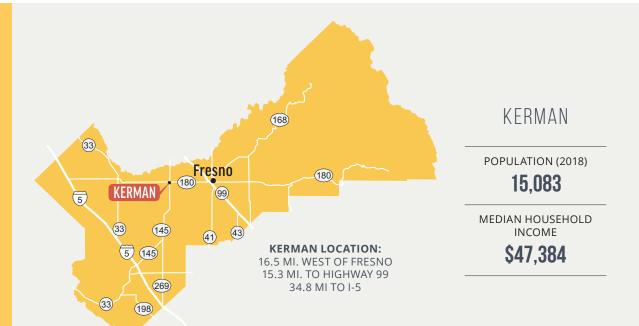


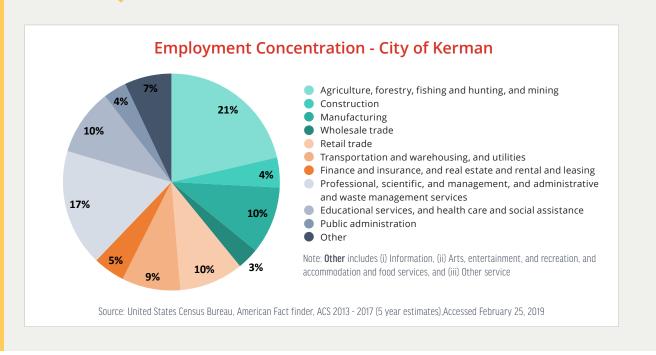
#### **RETAIL SPACE**

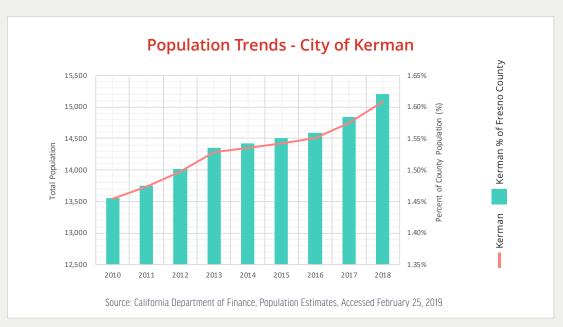
Inventory: **754,000 SF** 

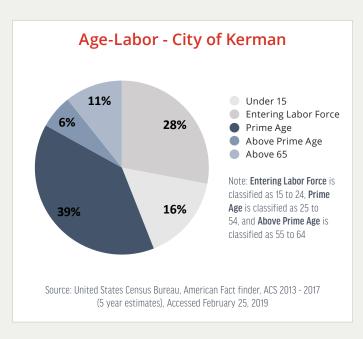
Vacancy Rate: 3%

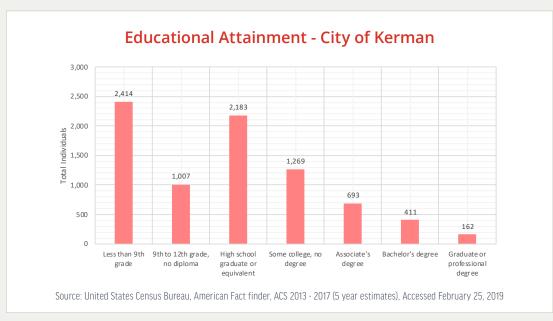
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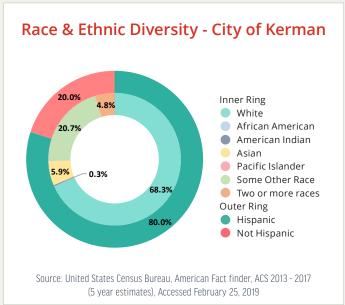










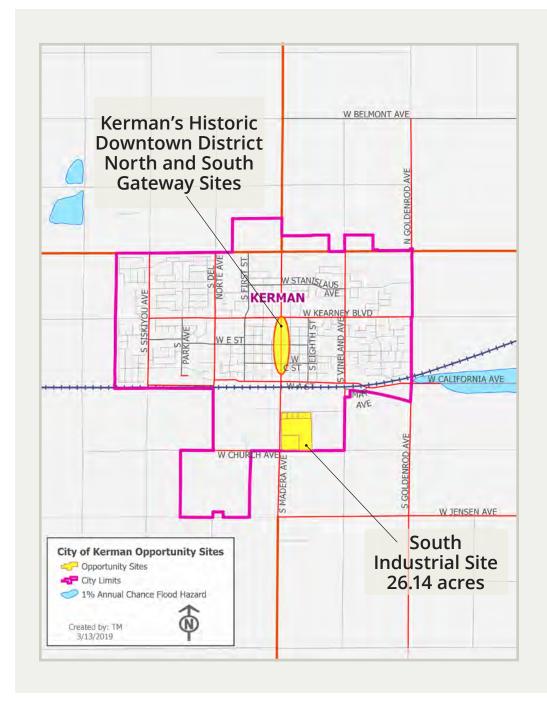


## CITY OF KERMAN

# **OPPORTUNITY SITES**

Historic Downtown Gateway Sites » The City of Kerman downtown shopping district on Madera Avenue grew from historic roots bound by G Street on the north and C Street on the south. The district has numerous buildings of local significance and is home to some of Kerman's most iconic retailers including Reno's Bowling and Reno's Hardware store. Investments in recent years, including Sebastian Corporation telecom offices, renovation of La Estrella grocery store and the planned construction of a boutique hotel, have sparked interest in returning the district to its historic role as a center of community life. The creative use of properties at the north and south gateways would help establish an identify for the rebirth of the historic district.

South Industrial Site » Kerman's industrial base is concentrated on both sides of South Madera Avenue on the city's south side. While the area has several development ready vacant industrial sites still available, the inventory of properties will not meet job creating industrial projects over the longer term. The 26.14 acre South Industrial Site is positioned to quickly reach the market in support of these investments.



FRESNO WESTSIDE

CITY OF KERMAN

SITE: GATEWAY SITES

SITE: GATEWAY SITES

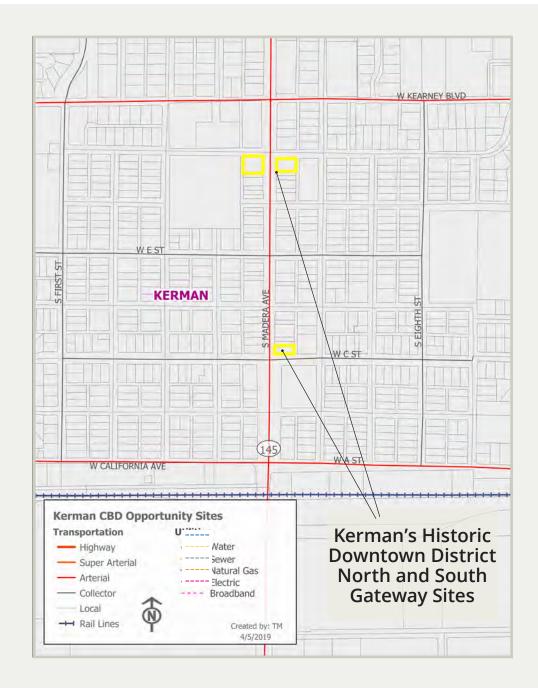
# TRANSPORTATION & UTILITIES

### **Transportation**

South Madera Avenue, Kerman's downtown main street, is also California Highway 145 and receives partial funding from Caltrans for road maintenance and improvements. Madera Avenue has been upgraded over the years including development of a landscaped center median with left turn lanes.

#### **Utilities**

The downtown is served by water, wastewater, electric, natural gas and broadband utilities in sufficient quantity to meet the needs of typical downtown development.





## SITE: GATEWAY SITES

# **LAND USE**

New Boutique Hotel

La Estrella

Reno's Bowling

Sebastian Telecom

Reno's Hardware

City Hall / Police

## **Surrounding Land Uses**

Kerman's historic downtown district supports a broad range of retail, commercial, office, and government activities. A large city park and recreation complex is located on at the northern end of the district, while the city hall and police station anchor the southern end.

## SITE: NORTH GATEWAY

# SITE DATA

### Strengths

- ◆ South Madera Avenue at G Street is considered the northern extent of the historic downtown district. Homes on the SW and SE corners of G Street and Madera Avenue are of historic significance. The home on the SW, now occupied by an ice cream store, was the home and office of a long time veterinarian well known and respected in the community. The home on the SE corner was home to one of Kerman's founding families. Properly programed and branded, these homes would provide an excellent welcoming gateway to the community for residents and visitors.
- The exterior of both buildings have been largely maintained to their historically significant architectural style.

#### Weaknesses

■ The community does not have a downtown plan in place that would both guide and leverage this and other projects to maximize the impact of overall downtown investments.

#### FRESNO COUNTY OPPORTUNITY SITE(1)

## SITE: North Gateway – Buildings #1 & #2

	•
Address	#1 - SE Corner Madera Ave and G Street #2 - SW Corner Madera Ave and G Street
City	Kerman, CA
Assessor Parcel Number (APN)	023-14-02, 023-23-14
Jurisdiction (City / County)	City
Opportunity Zone (Yes / No)	No
Ownership (Public / Private)	Private
Current Use	Commercial Private Residence
Site Acreage / Developable Acres (est.)	#1: .386 (120x140), #2: .29 (90/140)
Acreage within flood plain/floodway	None
Zoning	CG General Commercial
General Plan Designation	Contact city for info
Nearest Limited Access Highway / Distance	180 (limited access) / 18.4 miles
Rail Access Available to Site	None
Electric Power Provider	PG&E
Circuit serving site (kV / location)	12 / Kerman 1103 at site
Circuit kV capacity (total / peak load)	11.67 / 8.62
Substation dist. / kV capacity (total / peak)	miles / 29.7 / 25.29
Natural Gas Provider	PG&E
Line serving site - location and size	Contact city for info
Water Provider	City of Kerman
Line serving site - location and size	Contact city for info
System capacity / average daily use (MGD)	Contact city for info
Wastewater Provider	City of Kerman
Line serving site - location and size	Contact city for info
Lift stations / force mains - location	Contact city for info
System capacity / average daily use (MGD)	Contact city for info
Broadband Provider	Contact city for info
Line serving site - location and capacity	Contact city for info
Development Status - EIR, CEQA, etc.	Contact city for info
(1) Sites were identified by City/County officials in	conjunction with the consulting team as Opportunity Sites that alig

(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.

## SITE: SOUTH GATEWAY

# SITE DATA

## **Strengths**

- Sebastian Corporation operates headquarter functions and telecom operations on the SW corner of C Street and South Madera Avenue. The NW corner was recently converted to a pocket-park that fronts an employee parking lot. A complimentary installation on the South Gateway Site would bookend the intersection and create a distinctive entrance to the downtown.
- The South Gateway Site is currently used for a parking lot and a ice vending machine. Both uses are not critical components for the downtown and could be easily moved.

#### Weaknesses

■ The community does not have a downtown plan in place that would both guide and leverage this and other projects to maximize the impact of downtown investments.

#### FRESNO COUNTY OPPORTUNITY SITE(1)

## SITE: South Gateway

	<del>-</del>
Address	NE Corner - Madera Ave and C Street
City	Kerman, CA
Assessor Parcel Number (APN)	023-18-05
Jurisdiction (City / County)	City
Opportunity Zone (Yes / No)	No
Ownership (Public / Private)	Private
Current Use	Parking lot
Site Acreage / Developable Acres (est.)	.193 (60x140)
Acreage within flood plain/floodway	None
Zoning	CG General Commercial
General Plan Designation	Contact city for info
Nearest Limited Access Highway / Distance	180 (limited access) / 18.5 miles
Rail Access Available to Site	None
Electric Power Provider	PG&E
Circuit serving site (kV / location)	12 / Kerman 1103 at site
Circuit kV capacity (total / peak load)	11.67 / 8.62
Substation dist. / kV capacity (total / peak)	miles / 29.7 / 25.29
Natural Gas Provider	PG&E
Line serving site - location and size	Contact city for info
Water Provider	City of Kerman
Line serving site - location and size	Contact city for info
System capacity / average daily use (MGD)	Contact city for info
Wastewater Provider	City of Kerman
Line serving site - location and size	Contact city for info
Lift stations / force mains - location	Contact city for info
System capacity / average daily use (MGD)	Contact city for info
Broadband Provider	Contact city for info
Line serving site - location and capacity	Contact city for info
Development Status - EIR, CEQA, etc.	Contact city for info
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(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.

Sebastian Pocket Park

Proposed South Gateway
Pocket Park



Sebastian Corporation — pocket park and parking





Kerman — north gateway to downtown



Former veterinary office, now ice cream store

## SITE: GATEWAY SITES

# RECOMMENDATIONS

COMMUNITY: City of Kerman

SITE: NORTH GATEWAY SITES
#1: 547 SOUTH MADERA AVENUE
#2: 550 SOUTH MADERA AVENUE

#### **RECOMMENDED USE:**

Historical society, Kerman museum, welcome center, boutique shop selling locally produced products, coffee shop

COMMUNITY: City of Kerman

SITE: **SOUTH GATEWAY SITE 784 SOUTH MADERA AVENUE** 

#### RECOMMENDED USE:

Pocket park and parking lot that mirror the Sebastian installation on the NW corner of Madera Avenue and C Street

#### **Next Steps**

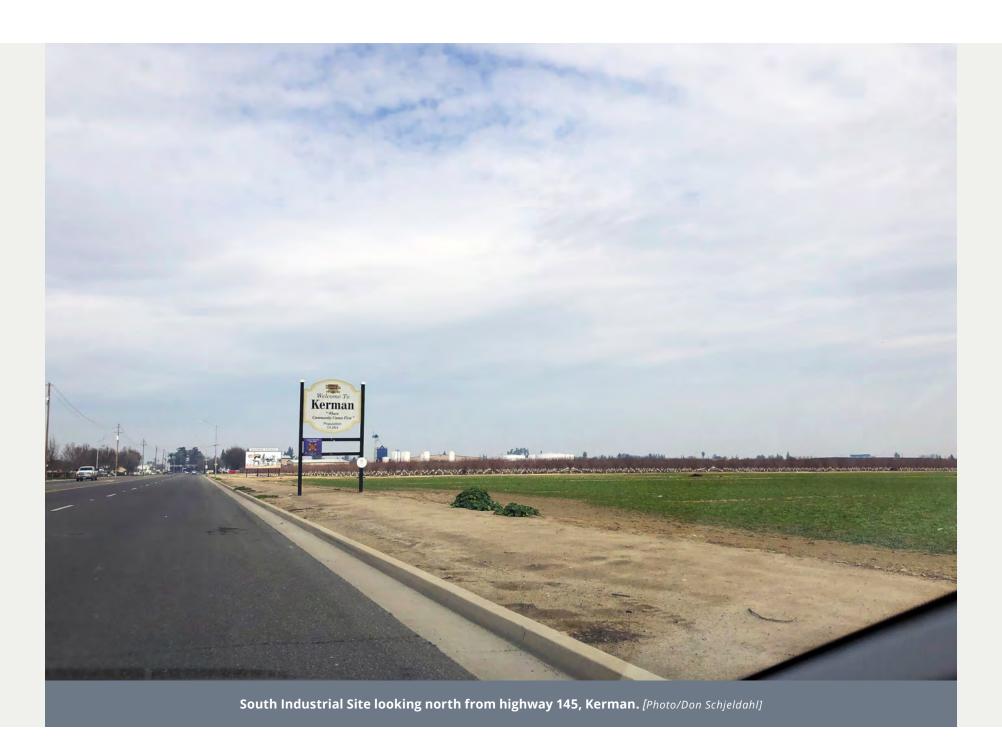
Reach out to stakeholders and work together to develop a downtown plan that will guide and fund conversion of these properties and other projects within the downtown district.



FRESNO WESTSIDE

CITY OF KERMAN

SITE:
SOUTH INDUSTRIAL



PAGE 3-36

## SITE: SOUTH INDUSTRIAL

# TRANSPORTATION & UTILITIES

### **Transportation**

The district has good road access via Highway 145, West Commerce Way, and West Church Avenue. Highway 145 connects to I-5 34 miles to the south. Alternate routes to Highway 180 that avoid travel through the city center are available.

#### **Utilities**

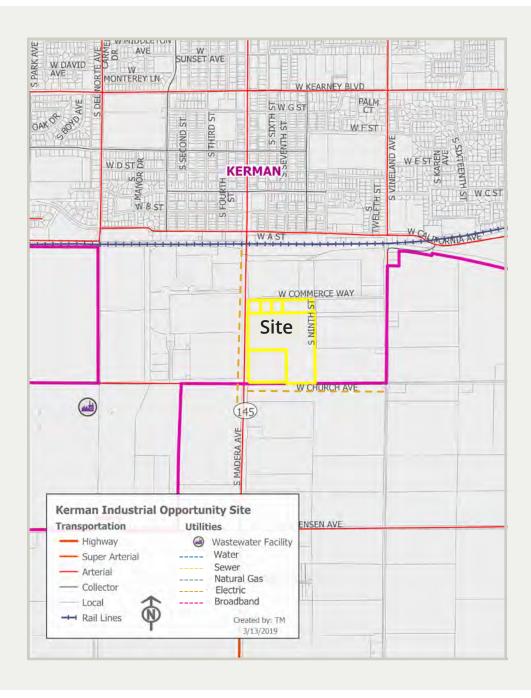
**Water** – Service is now provided by the City of Kerman.

**Sewer** – Service is now provided by the City of Kerman.

Natural Gas – Service is provided by PG&E.

**Electric** – 12kV service is at the site, provided by PG&E. Substation and circuit capacity are sufficient to meet near term needs.

**Broadband** - Contact city for information.



# SITE: SOUTH INDUSTRIAL SITE DATA

## **Strengths**

- Water, wastewater, natural gas, broadband, and electric power are in proximity of the site and can support industrial operations
- The property is zoned Heavy Manufacturing and is well suited for industrial operations.
- Access could be provided via Highway 145 subject to existing and proposed driveway spacing and is subject to Caltrans approval.

#### Weaknesses

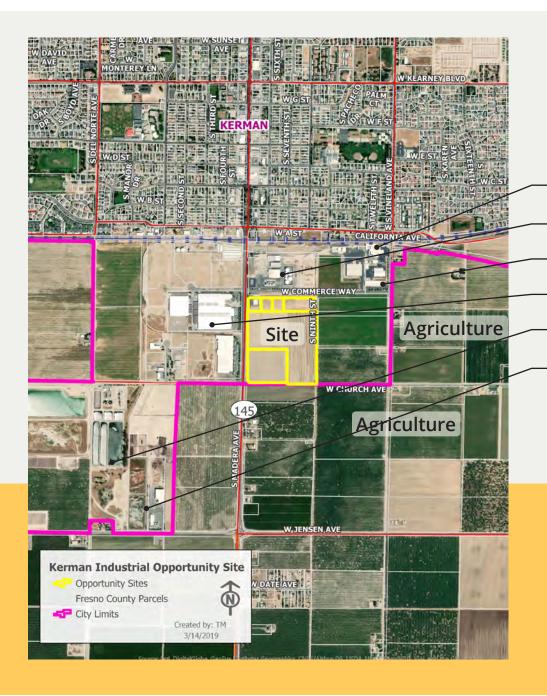
■ PG&E does not allow electric service to the property via connection from Highway 145. Electric service to the site will require an extension of PG&E power lines east on Commerce Avenue and then south onto the property.

#### FRESNO COUNTY OPPORTUNITY SITE(1)

## **SITE: South Industrial Property**

Address	1380 S. Madera Ave
City	Kerman, CA
Assessor Parcel Number (APN)	023-07-07
Jurisdiction (City / County)	City
Opportunity Zone (Yes / No)	No
Ownership (Public / Private)	Private
Current Use	Agriculture
Site Acreage / Developable Acres (est.)	26.14 / 26.14
Acreage within flood plain/floodway	None
Zoning	M-2 Heavy Manufacturing
General Plan Designation	Contact city for info
Nearest Limited Access Highway / Distance	180 (limited access) / 18.7 miles
Rail Access Available to Site	Contact city for info
Electric Power Provider	PG&E
Circuit serving site (kV / location)	12 / Kerman 1108 .25 miles
Circuit kV capacity (total / peak load)	12.19 / 5.9
Substation dist. / kV capacity (total / peak)	miles / 29.7 / 24.79
Natural Gas Provider	PG&E
Line serving site - location and size	Contact city for info
Water Provider	City of Kerman
Line serving site - location and size	Contact city for info
System capacity / average daily use (MGD)	Contact city for info
Wastewater Provider	City of Kerman
Line serving site - location and size	Contact city for info
Lift stations / force mains - location	Contact city for info
System capacity / average daily use (MGD)	Contact city for info
Broadband Provider	Contact city for info
Line serving site - location and capacity	Contact city for info
Development Status - EIR, CEQA, etc.	Contact city for info
(f) Cites were identified by City/County officials in	applymentian with the appropriate and a Opposituality Cites that all

(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.



## SITE: SOUTH INDUSTRIAL LAND USE

Helena Industries

Performance

Advance Water Products

Panoche Creek Packaging

City of Kerman wastewater treatment plant

Midvalley Disposal Transfer

## **Surrounding Land Uses**

The South Industrial Site is part of an industrial district home to a mix of manufacturing plants, commercial operations, agriculture, and the city's wastewater treatment plant. The area is well suited for light and heavy industrial operations, and distribution activities.

## SITE: SOUTH INDUSTRIAL

## **RECOMMENDATIONS**

COMMUNITY: City of Kerman

**SITE: South Industrial Site** 

RECOMMENDED USE:

Heavy and light industrial, distribution

## Investments required to ready property for market

- 1. Develop a master plan that shows development alternatives for the property. Include engineering for infrastructure and cost estimates for extending utility services to the site.
- 2. Secure funding for extension of PG&E service line down W. Commerce Way and on to the property.



## FRESNO WESTSIDE MENDOTA

## CITY OF MENDOTA CITY PROFILE

#### **CITY CONTACT:**

Cristian Gonzalez, City Manager cristian@cityofmendota.com (559) 655-4298

#### **Community Projects**

Sustainable Aviation Project (SAP) at Mendota Airport – In cooperation with City of Reedley and Chandler Airport, SAP is home to largest concentration of electric propulsion aircraft in the nation, which is planned for low-cost pilot training.



#### INDUSTRIAL SPACE

Inventory: 208,000 SF

Vacancy Rate: 0%

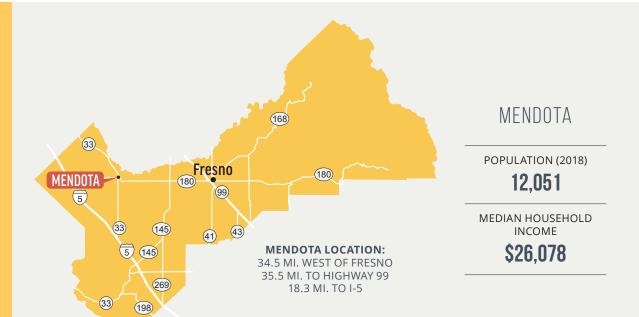


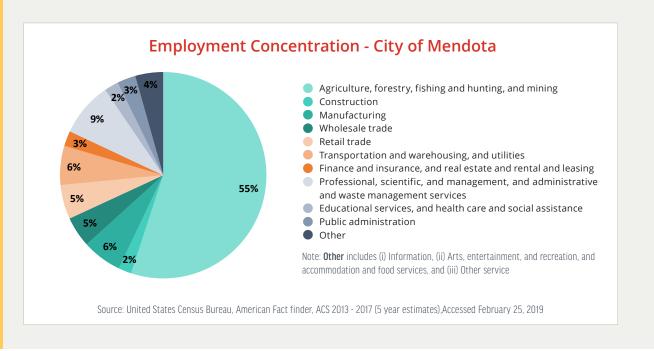
#### **RETAIL SPACE**

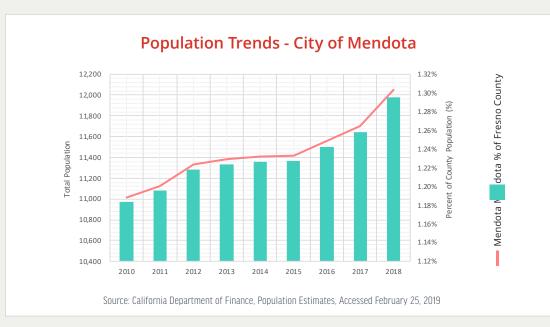
Inventory: 200,000 SF

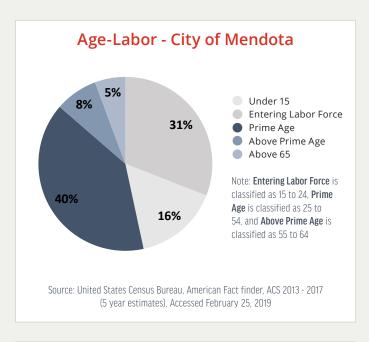
Vacancy Rate: 0%

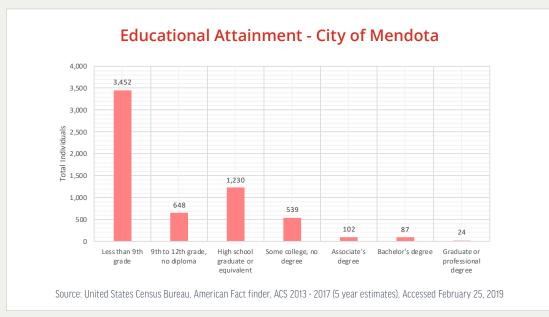
Space Source: CoStar Analytics. Accessed July 2019.

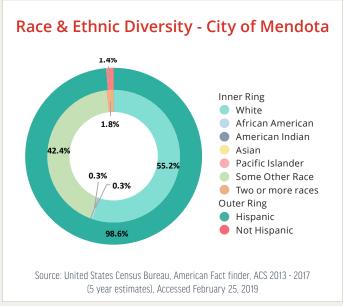










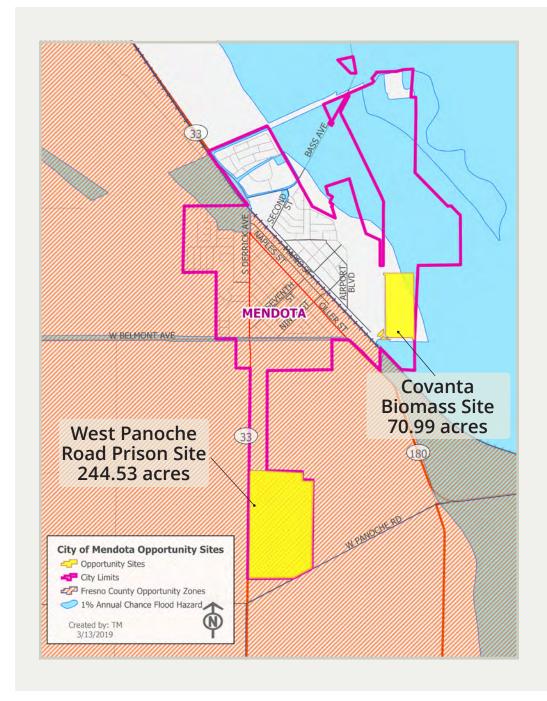


## CITY OF MENDOTA

## **OPPORTUNITY SITES**

Covanta Energy Biomass Site » The Covanta energy plant produced electricity for the grid from agricultural biomass. The rectangular 70.99 acre site includes approximately eight acres for the power plant and related equipment, with the remaining acreage used for staging biomass feedstock. The plant ceased operation in 2014. There are no current plans for restarting the plant. The NE corner of the property is located in a 100-year flood zone. The flat property is within Mendota city limits and is zoned M2 - Heavy Industrial.

West Panoche Road Prison Site » During the State of California's era of private prison construction the 244.53 acre property on the south side of Mendota along Highway 33 was purchased by a private developer and proposed as a site for a new prison. California's private prison program is no longer active. The site is flat, within the City of Mendota, and is zoned M2 – Heavy Industrial.



FRESNO WESTSIDE

CITY OF MENDOTA

SITE:

**COVANTA BIOMASS** 



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## SITE: COVANTA BIOMASS

## TRANSPORTATION & UTILITIES

### **Transportation**

The property is served from Highway 180 via Belmont Avenue, an industrial grade roadway. An SJVRR rail line is located approximately ¼ mile south of the site with undeveloped land separating the two. Rail service may be possible.

#### **Utilities**

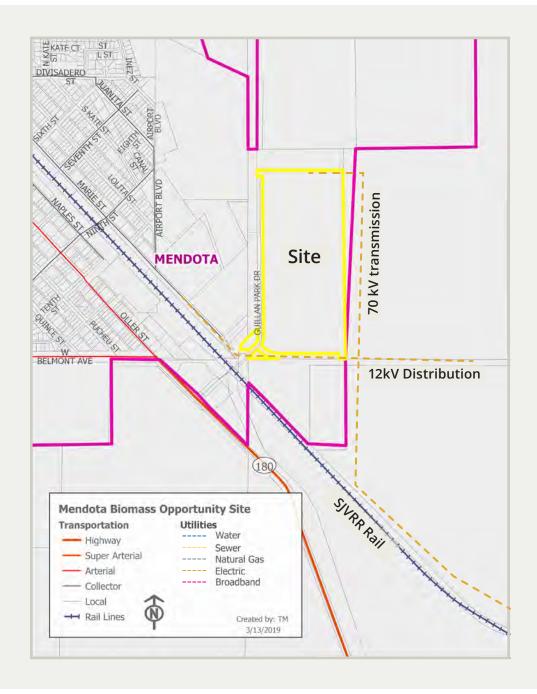
**Water** – Service provided by the City of Mendota via a line that runs along Belmont Avenue.

**Sewer** – Service to the site will be provided by the City of Mendota. The Mendota waste water treatment plant is located directly north of the property.

Natural Gas – Service provided by PG&E.

**Electric** – 12kV service borders the southern property boundary. The power plant is connected to a 70kV transmission line.

**Broadband** – Contact city for information.



## SITE: COVANTA BIOMASS

## SITE DATA

### Strengths

- The property is an industrial district located away from residential and other non-conforming land uses.
- The site offers convenient access from Highway 180 via West Belmont Avenue, an industrial grade roadway.
- Water, wastewater, natural gas, broadband, and electric power are in proximity of the site.
- In addition to 12kV distribution electric service, primary service from a 70kV high voltage transmission line is now present on the property.
- Rail service may be possible from the SJVRR line located ¼ mile to the south.

#### Weaknesses

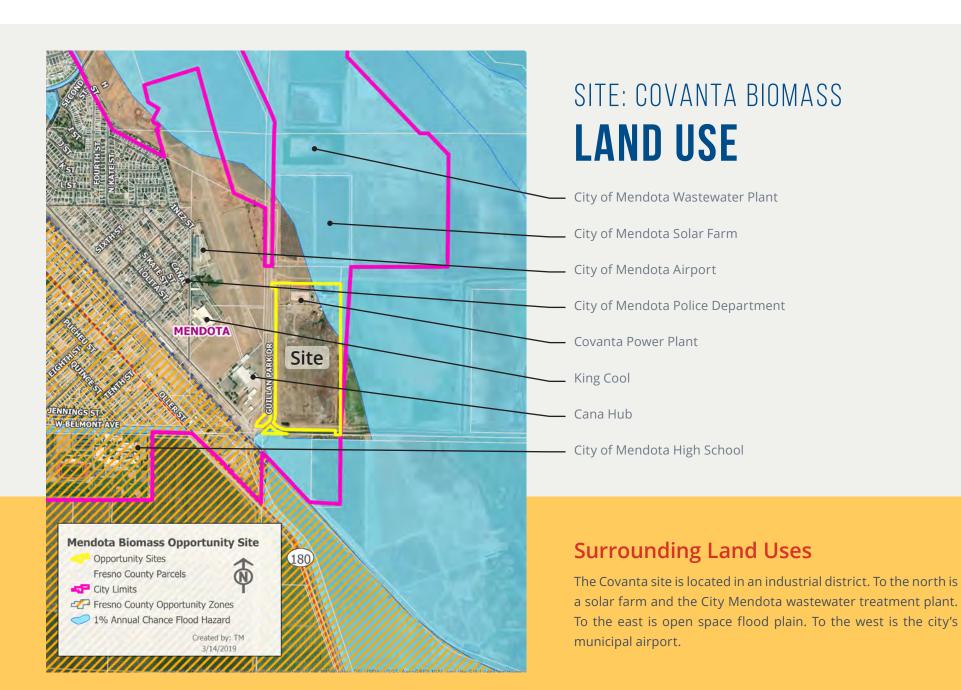
- The shuttered Covanta power plant remains on the property and could complicate full development of the site.
- Covanta Energy has not confirmed the property is available for development.
- Environmental studies have not been completed, environmental conditions are unknown.
- A portion of the property is in a 100-year flood plain.
- City of Mendota water and waste water systems are nearing capacity and could restrict development of the property.

#### FRESNO COUNTY OPPORTUNITY SITE(1)

## SITE: Covanta Energy Corporation

Address	400 Guillen Parkway
City	Mendota, CA
Assessor Parcel Number (APN)	013-03-61
Jurisdiction (City / County)	City
Opportunity Zone (Yes / No)	No
Ownership (Public / Private)	Private
Current Use	Closed biomass power generating plant
Site Acreage / Developable Acres (est.)	70.99 / 70.99
Acreage within flood plain/floodway	Contact city for info
Zoning	M-2 Heavy Manufacturing Industrial
General Plan Designation	Heavy Industrial
Nearest Limited Access Highway / Distance	I-5 Panoche Road Interchange / 19.5 miles
Rail Access Available to Site	None
Electric Power Provider	PG&E
Circuit serving site (kV / location)	12 / Mendota 1102 .3 miles 70 / Mendota Biomass Tap at site
Circuit kV capacity (total / peak load)	12.19 / 7.36
Substation dist. / kV capacity (total / peak)	miles / 29.7 / 22.6
Natural Gas Provider	PG&E
Line serving site - location and size	Contact city for info
Water Provider	City of Mendota
Line serving site - location and size	Contact city for info
System capacity / average daily use (MGD)	Contact city for info
Wastewater Provider	City of Mendota
Line serving site - location and size	Contact city for info
Lift stations / force mains - location	Contact city for info
System capacity / average daily use (MGD)	Contact city for info
Broadband Provider	Contact city for info
Line serving site - location and capacity	Contact city for info
Development Status - EIR, CEQA, etc.	Contact city for info

(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.



## SITE: COVANTA BIOMASS

## RECOMMENDATIONS

COMMUNITY: City of Mendota

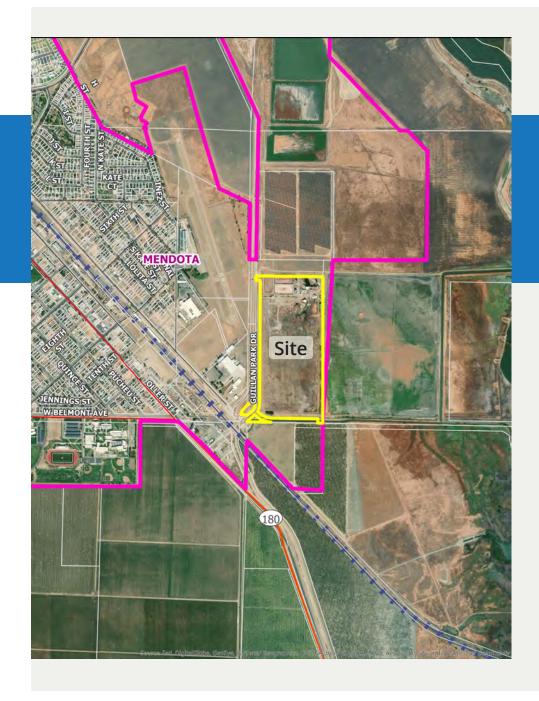
SITE: Covanta Energy Biomass Site

RECOMMENDED USE:

Heavy and Light Industrial

## Investments required to ready property for market

- 1. A reading from Covanta Energy on future plans for the power plant is needed to determine if the property can be considered for other industrial projects.
- 2. Details about on-site utilities and infrastructure are needed to better understand development opportunities and constraints..
- 3. A master plan that shows development alternatives and includes preliminary engineering, rail development, and site preparation costs estimates is recommended.



FRESNO WESTSIDE

CITY OF MENDOTA

SITE:

**PRISON SITE** 



## SITE: PRISON SITE

## TRANSPORTATION & UTILITIES

### **Transportation**

The 244.53 acre Prison Site has approximately 4200' frontage on CA Highway 33. Caltrans will not allow direct access to the property from the highway. Access to the property is via West Panoche Road, an industrial grade county road that connects to Highway 180.

### **Utilities**

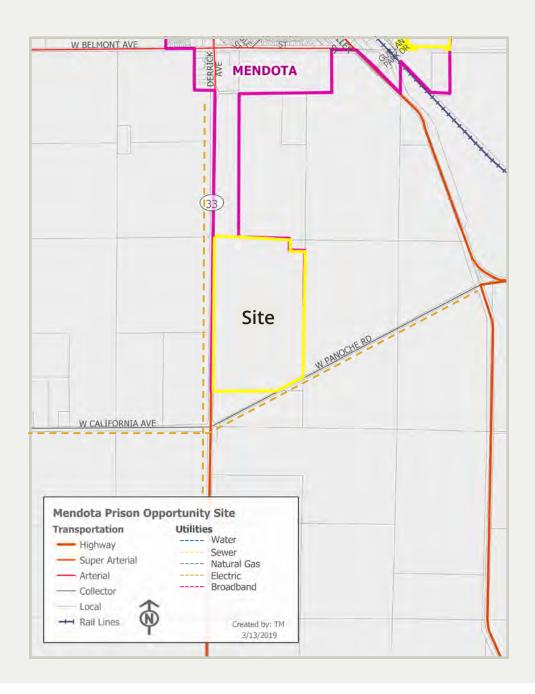
**Water** – Service is provided by the City of Mendota via a line that now ends at the Federal Prison located across Highway 33 from the site. The elevated water tank at the nearby federal prison, if made available for the Prison Site, would be a reliable source of high pressure water.

**Sewer** – Service to the site will be provided by the City of Mendota. A line extension is needed from the waste water line that now ends at the Federal Prison.

Natural Gas – Service provided by PG&E.

**Electric** – 12kV service borders the southern property boundary. The power plant is connected to a 70kV transmission line.

**Broadband** – Contact city for info.



## SITE: PRISON SITE

## SITE DATA

## **Strengths**

- The property is located within a Federally designated Opportunity Zone.
- The elevated water tank located across Highway 33 at the Federal prison, if made available, would provide reliable high pressure water service to the site.
- Water, waste water, natural gas, electric power and broadband services are proximate to the site.
- The site is flat with good access to both Highway 33 and Highway 180.
- Highway 33/180 intersection reconstruction planned for this year will improve flow and safety for vehicles accessing the site.

### Weaknesses

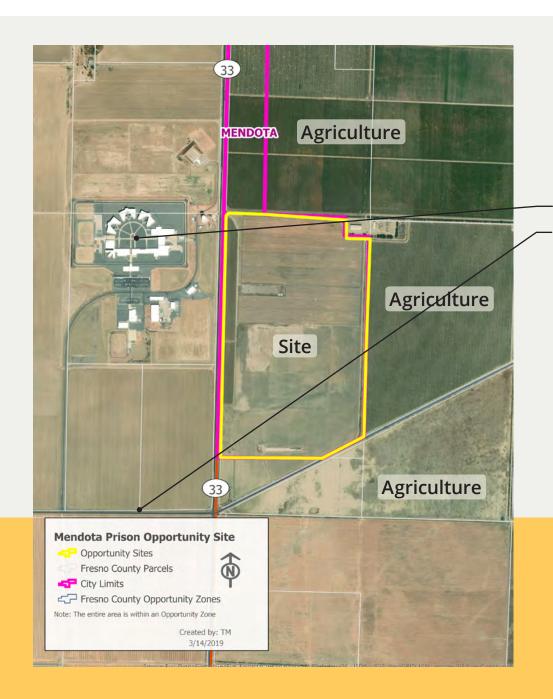
- The property owner has not confirmed the property is available for development.
- City of Mendota water and waste water systems are nearing capacity and could restrict development of the property.

#### FRESNO COUNTY OPPORTUNITY SITE(1)

### SITE: Prison Site

Address	NE Corner - Highway 33 / W. Panoche Road
City	Mendota, CA
Assessor Parcel Number (APN)	019-06-44
Jurisdiction (City / County)	City
Opportunity Zone (Yes / No)	Yes
Ownership (Public / Private)	Private
Current Use	Agriculture
Site Acreage / Developable Acres (est.)	244.53 / 244.53
Acreage within flood plain/floodway	None
Zoning	M-2 Heavy Manufacturing Industrial
General Plan Designation	Light Industrial
Nearest Limited Access Highway / Distance	I5 Panoche Road Interchange / 15.9 miles
Rail Access Available to Site	None
Electric Power Provider	PG&E
Circuit serving site (kV / location)	12 / Mendota 1102 at site
Circuit kV capacity (total / peak load)	12.19 / 7.36
Substation dist. / kV capacity (total / peak)	miles / 29.7 / 22.6
Natural Gas Provider	PG&E
Line serving site - location and size	Contact city for info
Water Provider	City of Mendota
Line serving site - location and size	Contact city for info
System capacity / average daily use (MGD)	Contact city for info
Wastewater Provider	City of Mendota
Line serving site - location and size	Contact city for info
Lift stations / force mains - location	Contact city for info
System capacity / average daily use (MGD)	Contact city for info
Broadband Provider	Contact city for info
Line serving site - location and capacity	Contact city for info
Development Status - EIR, CEQA, etc.	Contact city for info

(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.



## SITE: PRISON SITE LAND USE

Federal Prison

Prison Entrance

## **Surrounding Land Uses**

The West Panoche Road Prison Site is located approximately 1.5 miles south of Mendota town center. The property is surrounded on three sides by agriculture. The Federal Correction Institution (FCI Mendota) is located west of the property across Highway 33.

## SITE: PRISON SITE

## **RECOMMENDATIONS**

COMMUNITY: City of Mendota

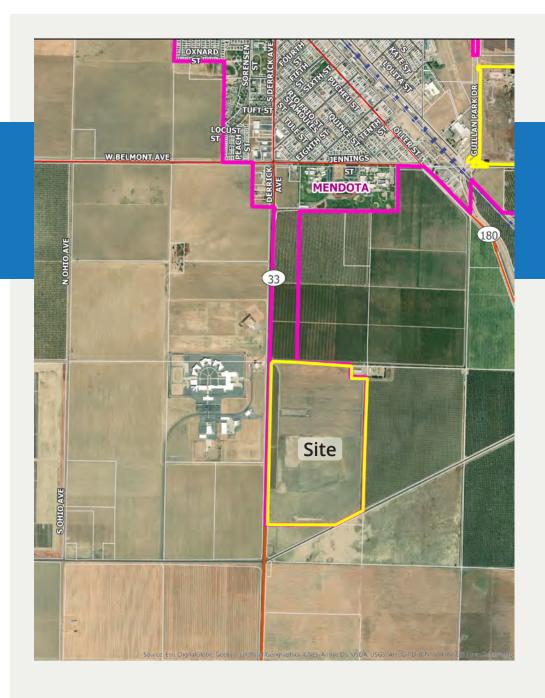
**SITE: West Panoche Road Prison Site** 

RECOMMENDED USE:

**Light and Heavy Industrial** 

## Investments required to ready property for market

Preparation of a master plan is recommended. The plan should include preliminary engineering and cost estimates for site preparation and connection of utility lines.



## FRESNO WESTSIDE SAN JOAQUIN

## CITY OF SAN JOAQUIN

## CITY PROFILE

#### **CITY CONTACT:**

Elizabeth Nunez, City Manager elizabethn@cityofsanjoaquin.org (559) 693-4311

#### **Community Projects**

Access - Cherry Lane Industrial Park – Plans to construct new street and expand sewer, water storm drain

**South Railroad Ave** – Reconstruct road from Manning Ave to Main St to support truck traffic; install storm drains / drainage



#### INDUSTRIAL SPACE

Inventory: 3.0M SF

Vacancy Rate: 0.4%

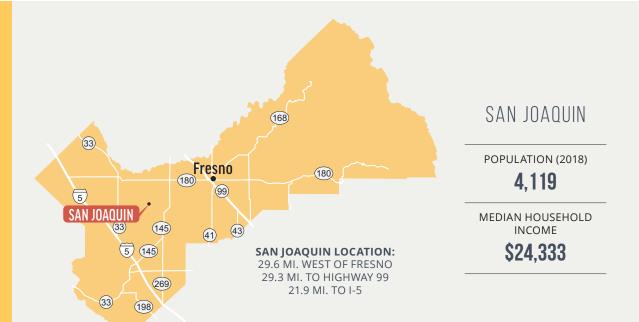


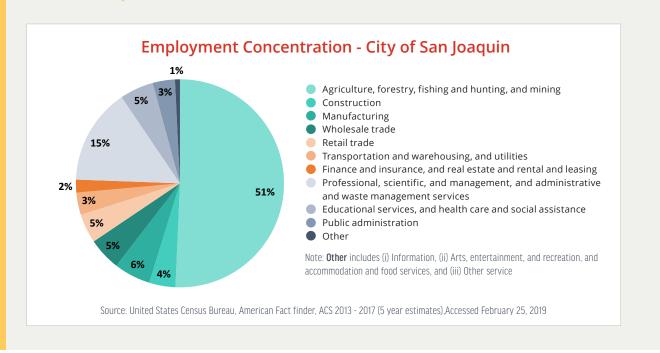
#### **RETAIL SPACE**

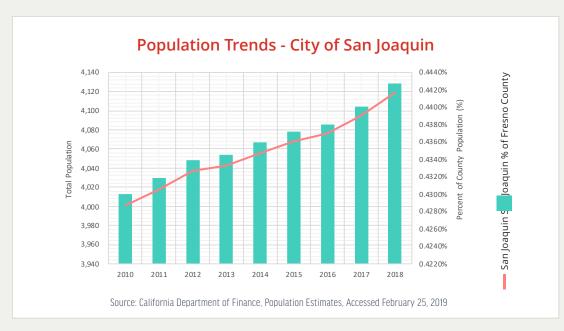
Inventory: 53,600 SF

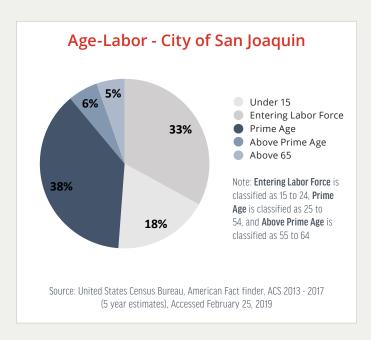
Vacancy Rate: 16.8%

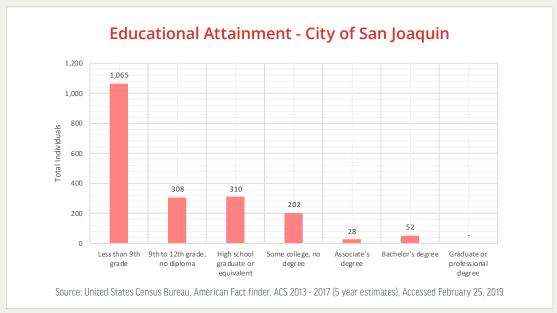
Space Source: CoStar Analytics. Accessed July 2019.

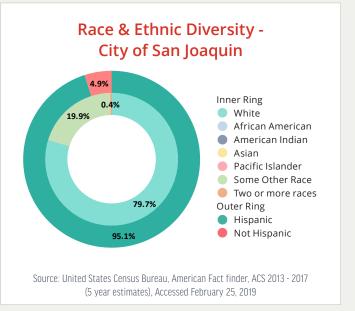








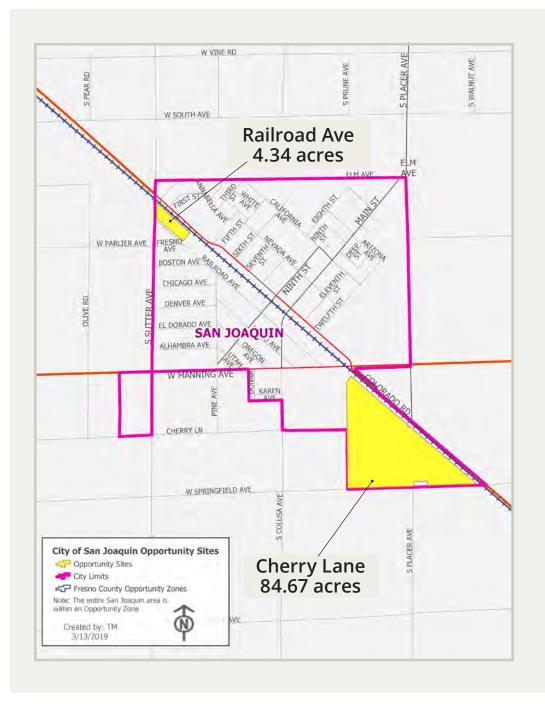




## OPPORTUNITY SITES

Railroad Street » The site is located in San Joaquin's historic industrial corridor that parallels the railroad. The property is currently used as a storage yard by OPC Farms, apparently for unused equipment. Unused concrete storage silos are located at the northern end of the property. Agricultural chemicals company Wilbur Ellis operates on the adjacent property to the southeast. The company is in need of additional space to support growing demand for their products. The OPC Railroad Street site is ideally situated to support Wilbur Ellis expansion plans.

Cherry Lane » Newer industrial operations in San Joaquin have developed south of Manning Avenue and east of Colusa Avenue. Development ends at Cherry Lane. The City of San Joaquin is currently undertaking a short extension of Cherry Lane from Colusa Avenue to the east. The road will serve a new municipal water treatment installation, a water storage tank, and improved stormwater management system that serves the industrial area. The Cherry Lane site, now in agriculture, is designated in the General Plan for future industrial development.



FRESNO WESTSIDE

CITY OF SAN JOAQUIN

SITE:

**RAILROAD STREET** 



## SITE: RAILROAD STREET

## TRANSPORTATION & UTILITIES

### **Transportation**

The Railroad Street property is one block southwest of Colorado Road, an arterial county highway that connects San Joaquin with Mendota and Helm. The site is served by Railroad Street, a local road that is in serious disrepair. The nearest limited access highway is I-5, 22.3 miles to the west. A rail siding touches a section of the property.

### **Utilities**

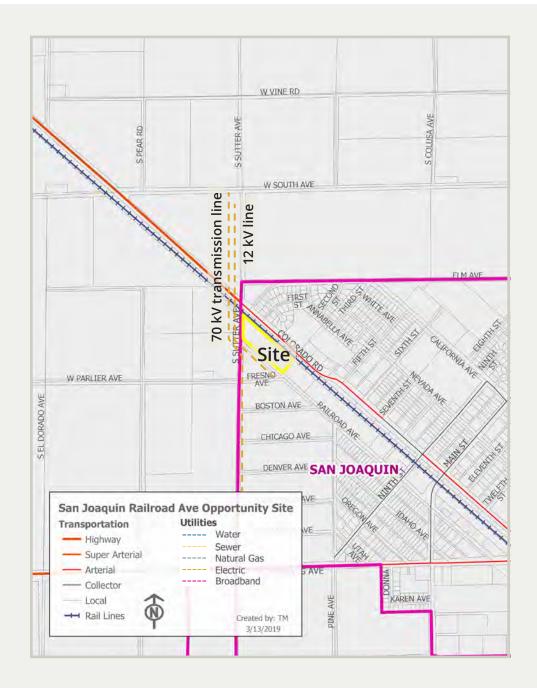
**Water** – Service provided by the City of San Joaquin via a 2" line on site.

**Sewer** – Service provided by the City of San Joaquin. No line currently on site.

Natural Gas – Service provided by PG&E.

**Electric** – 12kV service is at the site, provided by PG&E. A 70 kV transmission is also near the site on Sutter Avenue.

**Broadband** – Service provided by Sebastian, Unwired, Comcast.



## SITE: RAILROAD STREET

## SITE DATA

### Strengths

- The property is located within a Federally designated Opportunity Zone.
- Water, wastewater, natural gas, and electric power are in proximity of the site and can support industrial operations.
- Electric primary service from a high voltage transmission line is possible at this location. A 70 kV transmission runs north/south along Sutter Avenue at the northwest end of the site.
- Surrounding land uses are compatible with industrial operations.
- The property is zoned M-1 Light Industrial.
- San Joaquin's waste water treatment plant was recently upgraded and treatment capacity increased.
- Capacity and storage improvements to the City's water treatment system, currently underway, will better meet the needs of industry.

### Weaknesses

- Railroad Street, which serves the property, is beyond repair and will require complete reconstruction.
- The OPC Railroad Street property is currently not for sale. However, without room for expansion, Wilbur Ellis may defer investment in San Joaquin.

#### FRESNO COUNTY OPPORTUNITY SITE(1)

### SITE: Railroad Street

Address	22300 Railroad St
City	San Joaquin, CA
Assessor Parcel Number (APN)	033-05-53
Jurisdiction (City / County)	City
Opportunity Zone (Yes / No)	Yes
Ownership (Public / Private)	Private
Current Use	Old equipment laydown yard
Site Acreage / Developable Acres (est.)	4.34 / TBD
Acreage within flood plain/floodway	Contact city for info
Zoning	M-1 Light Manufacturing
General Plan Designation	I - Industrial
Nearest Limited Access Highway / Distance	I-5 Manning Ave Interchange / 22.3 miles
Rail Access Available to Site	Yes
Electric Power Provider	PG&E
Circuit serving site (kV / location)	12 / San Joaquin 1108 at site 70 / Mendota - San Joaquin - Helm .3 miles
Circuit kV capacity (total / peak load)	7.01 / 2.65
Substation dist. / kV capacity (total / peak)	miles / 10.4 / 8.62
Natural Gas Provider	PG&E
Line serving site - location and size	Contact PG&E
Water Provider	City of San Joaquin
Line serving site - location and size	2" Line On Site
System capacity / average daily use (MGD)	4.8 MGD/.850 MGD
Wastewater Provider	City of San Joaquin
Line serving site - location and size	None
Lift stations / force mains - location	Manning Ave lift station
System capacity / average daily use (MGD)	.500 MGD
Broadband Provider	Sebastian/Unwired/Comcast
Line serving site - location and capacity	Contact city for info
Development Status - EIR, CEQA, etc.	Contact city for info
(1) Sites were identified by City/County officials in	conjunction with the consulting team as Opportunity Sites that aligr

(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.



## SITE: RAILROAD STREET LAND USE

OPC Farms storage yard

Wilbur Ellis

OPC Farms operations

OPC Farms storage yard

## **Surrounding Land Uses**

The land between Railroad Street and the rail line is the historic industrial core of San Joaquin. Properties to the west, northwest, and south are currently agriculture. Land to the south is within city limits and is slated for future residential development.

## SITE: RAILROAD STREET

## RECOMMENDATIONS

COMMUNITY: San Joaquin

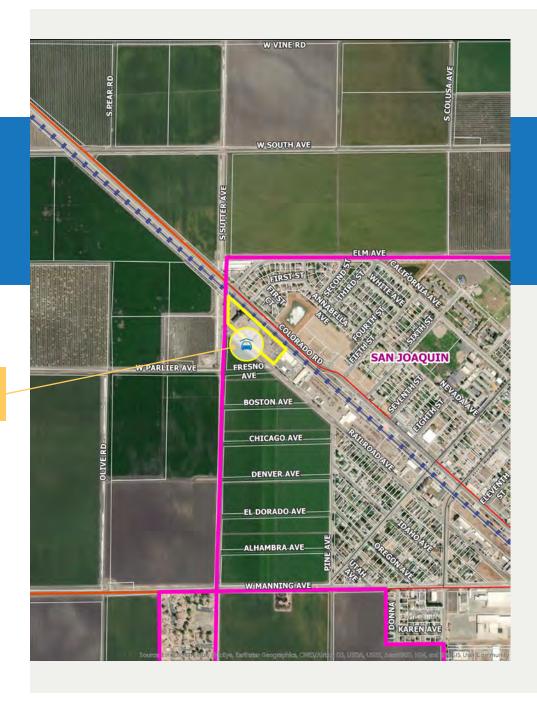
**SITE: Railroad Street** 

**RECOMMENDED USE:** 

Convert property from current use of storage for unused farm equipment to active industrial operations

## Investments required to ready property for market

- 1. Railroad Street is beyond repair and will require complete reconstruction. Without this improvement, future investment by Wilbur Ellis in San Joaquin could be in jeopardy.
- 2. Work with OPC Farms to make the property available for use by Wilbur Ellis.



FRESNO WESTSIDE

CITY OF SAN JOAQUIN

SITE:

**CHERRY LANE** 



## SITE: CHERRY LANE

## TRANSPORTATION & UTILITIES

### **Transportation**

The Cherry Lane Site currently has no road access. The nearest industrial rated road is South Colusa Avenue, 1/3 mile west of the property. Cherry Lane will need to be extended from Colusa to provide access. The nearest limited access highway is I-5, 22.3 miles to the west. A rail line parallels the eastern site boundary.

#### **Utilities**

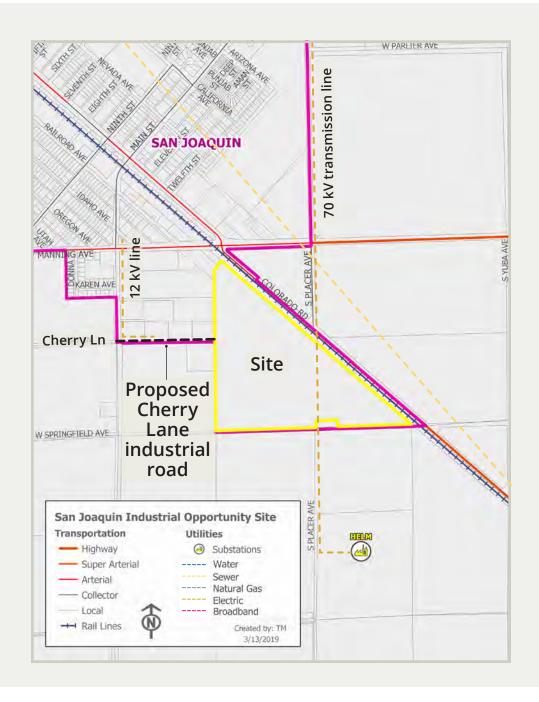
**Water** – Service provided by the City of San Joaquin via a line located in the Cherry Lane right-of-way, approximately 1,000 feet to the west.

**Sewer** – Service provided by City of San Joaquin. No line currently at site.

Natural Gas – Service provided by PG&E.

**Electric** – 12kV service is approximately 1,000 feet to the west. A 70 kV transmission line cuts across a portion of the site.

**Broadband** - Service provided by Comcast and Sebastian.



## SITE: CHERRY LANE

## SITE DATA

## Strengths

- The property is located within a Federally designated Opportunity Zone.
- The site offers approximately 3,500 feet of rail frontage.
- City water and sewer systems are being upgraded and are capable of meeting higher industrial demand.
- Electric primary service from a high voltage transmission line is possible at this location. A 70 kV transmission running north/south bisects approximately 30% of the eastern side of the property.
- Surrounding land uses are compatible with industrial operations.
- San Joaquin General Plan designates the property as Industrial.
- The city is upgrading water treatment, water storage capacity, and stormwater management infrastructure just west of the site along Cherry Lane extension.

#### Weaknesses

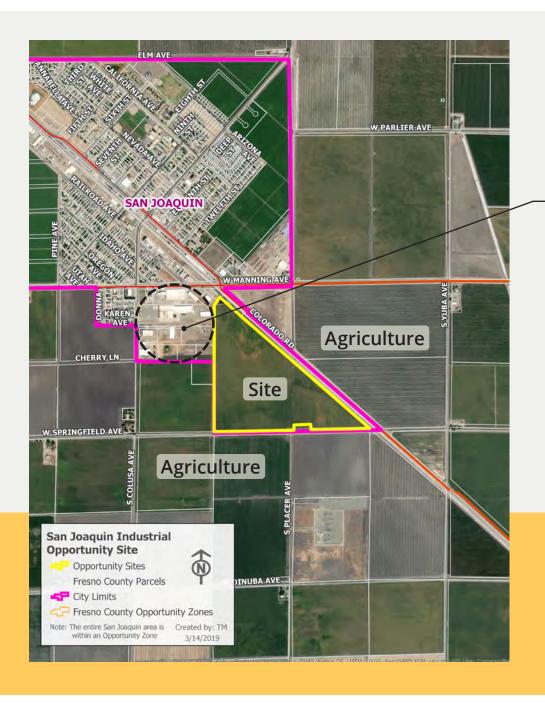
- Water, wastewater, natural gas, and electric power lines are now 1,000+ feet away from the property and will need to be extended.
- There is currently no industrial grade access road serving the property. Extension of Cherry Lane from Colusa Avenue is needed.

#### FRESNO COUNTY OPPORTUNITY SITE(1)

## SITE: Cherry Lane Extension Site

NW Corner - S. Colorado / W. Springfield
San Joaquin, CA
033-02-31
City
Yes
Private
Agriculture
84.67 / 84.67
Contact city for info
not designated
I - Industrial
I-5 Manning Ave Interchange / 22.3 miles
Yes
PG&E
12 / San Joaquin 1108 at site .3 miles 70 / Helm - Kerman .3 miles
7.01 / 2.65
miles / 10.4 / 8.62
PG&E
None
City of San Joaquin
None
4.8 MGD/.850 MGD
City of San Joaquin
none
Manning Ave near sutter
E00 MCD/ 200 MCD
.500 MGD/.280 MGD
Comcast and Sebastain
1777 1772 1772

(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.



## SITE: CHERRY LANE LAND USE

Area of light industrial operations

## **Surrounding Land Uses**

The property is a logical extension of newer industrial development that is found on the city's southeast side. Agriculture surrounds the site on three sides.

## SITE: CHERRY LANE

## **RECOMMENDATIONS**

COMMUNITY: San Joaquin

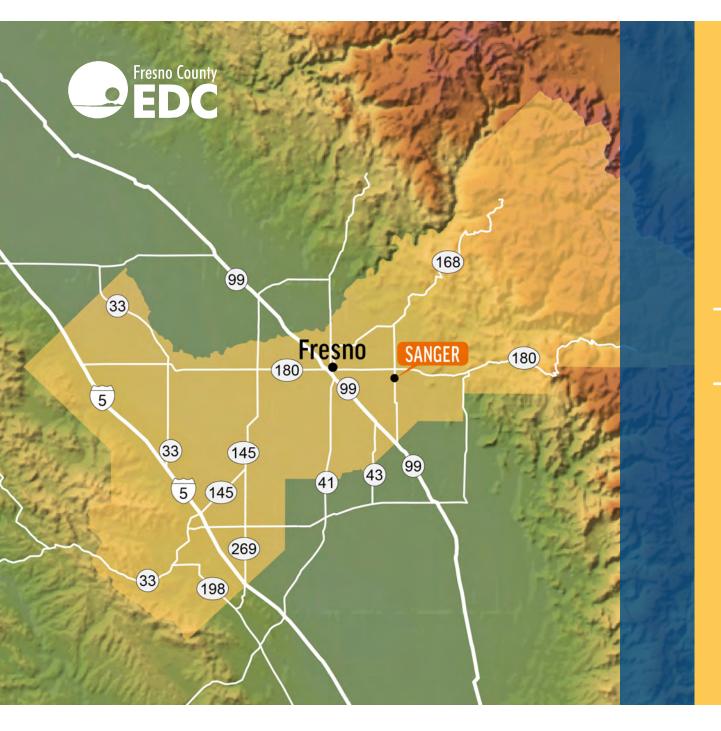
**SITE: Cherry Lane Industrial Site** 

RECOMMENDED USE: Industrial

## Investments required to ready property for market

- 1. 1/3 mile extension of Cherry Lane as an industrial road is needed to provide access to the property.
- 2. Engineering and costs estimates are recommended for the connection of water, wastewater, natural gas and electric lines to the site.
- 3. The railroad should be contacted and engaged in discussions on how rail service can be brought onto the property.





# FRESNO COUNTY OPPORTUNITY ANALYSIS

**SANGER** 

[ SEPTEMBER 2019 ]



FRESNO EASTSIDE

CITY OF SANGER

### CITY OF SANGER

## CITY PROFILE

CITY CONTACT:

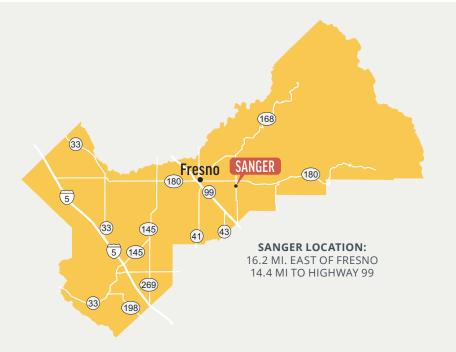
Tim Chapa City Manager tchapa@ci.sanger.ca.us (559) 876-6300 x1520

### **Community Projects**

- Industrial Waste Line \$2M project to extend waster water line to 150 acres of industrially zoned land
- Municipal Water Tank 750,000 gal. tank planned on north side

### **Recent Announcements**

City annexation to align with CA-180 and adds 254 acres of commercial property.



POPULATION (2018)

26,648

COMPOUNDED ANNUAL GROWTH RATE (2010-2018)

1.18%

MEDIAN HOUSEHOLD INCOME

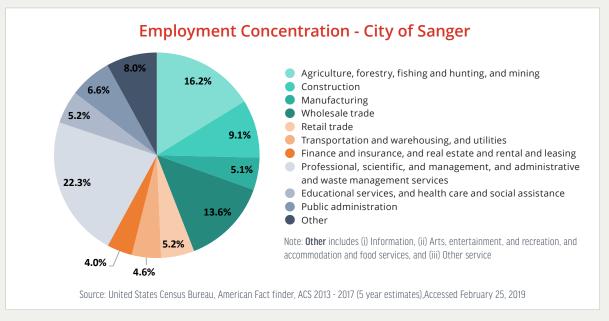
\$44,928

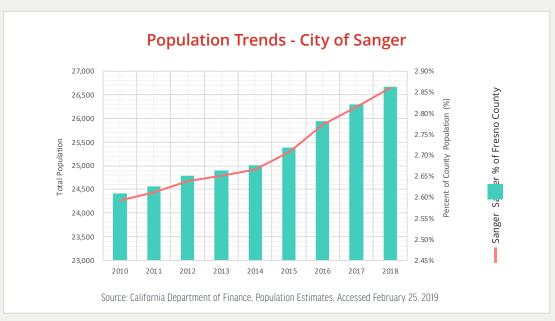
JOBS:HOUSING RATIO

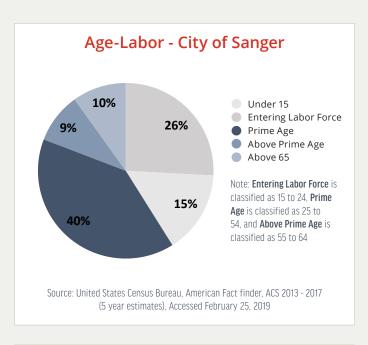
1.41

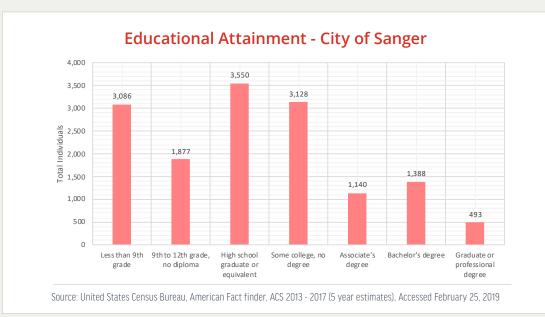
TAXABLE SALES (2016)

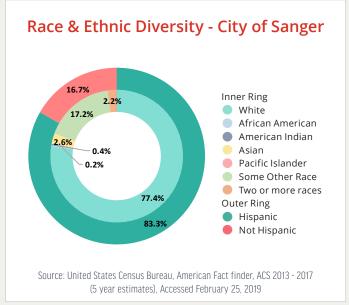
\$186.8 M











### **Residential Real Estate**



MEDIAN SINGLE FAMILY DETACHED HOMES (2018)

\$211,308

**MEDIAN ALL HOMES (2018)** 

\$147/SF

RESIDENTIAL PERMITS (2012–2017)

183

Median Housing Costs Source: Zillow Research, Zillow Home Value Index (ZHVI) Seasonally Adjusted Data

## Commercial & Industrial Real Estate



INDUSTRIAL SPACE

Inventory: 2.2M SF

Vacancy Rate: 0%



**RETAIL SPACE** 

Inventory: 1.1M SF

Vacancy Rate: 1.7%

Space Source: CoStar Analytics. Accessed July 2019.

### Per Capita & Median Household Income - City of Sanger Median household income \$60,000 48,730 \$50,000 44,928 \$40,000 \$30,000 22,234 17,112 \$20,000 \$10,000 Per capita income \$0 Sanger Fresno County Source: United States Census Bureau, American Fact finder, ACS 2013 - 2017 (5 year estimates), Accessed February 25, 2019





MEAN TRAVEL TIME POPULATION 16+ = 9,605 PEOPLE

24.5 MIN.

Source: United States Census Bureau, American Fact finder, ACS 2013 - 2017 (5 year estimates), Accessed February 25, 2019

### SITE SELECTOR INSIGHTS

## **SANGER**

**Industry/Office Gap** – Sanger leadership is focusing on retail and residential development. They may be missing an opportunity to create an employment center by not incorporating industrial and office development along with retail and highway commercial.

Mixed Use Industrial – Highway 180 and Academy Avenue area in Sanger is another area that has potential to support mixed use development including industrial operations. Sanger is not suited for big box warehousing as it is more distant from Highway 99.

**Fowler Packing** – Fowler Packing is not actively marketing company owned Sanger property. Most land holdings are being farmed and are not within city limits. Fowler Packing is working with city officials to build flexibility into their General Plan.

**Highway 180 Access** – Caltrans' long range plan for Highway 180 is to develop limited access interchanges at De Wolfe, McCall, and Academy, in that order.

**TABLE 2**Economic Forces and Opportunities in Sanger

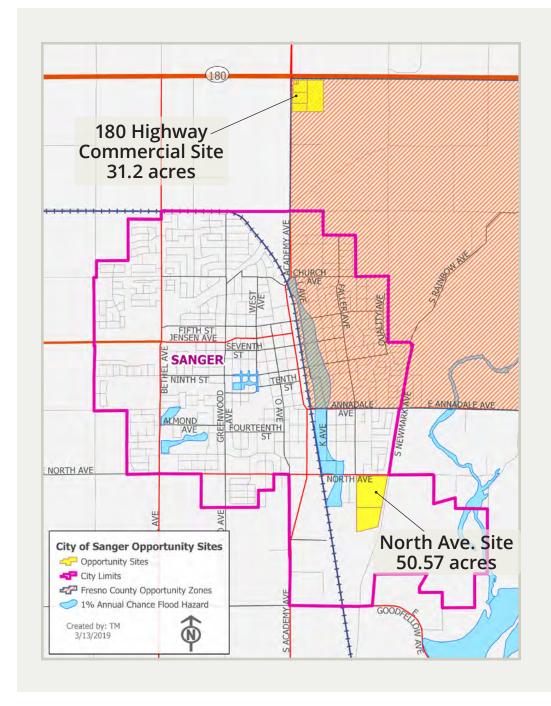
Economic Forces and the Availability of Developable Land	City	Catalyst Project Opportunities
Sanger is experiencing population growth from City of Fresno urban expansion from the west. As is typical with more rooftops in a community, Sanger is feeling pressure to develop more retail and commercial services.	Sanger	Highway commercial, office, manufacturing, ag processing, ag services

### CITY OF SANGER

## **OPPORTUNITY SITES**

180 Highway Commercial Site » The Highway 180 corridor east of Fresno is an active path of urban expansion. Sanger city leaders have long viewed the land between Highway 180 and the city's northern boundary as a place for new development. The city has completed, and continues to refine, master plans for several thousand acres in this area. Residential, highway commercial, big box retail, and hospitality are among the land uses being considered. The annexation of over 350 acres of land bordering Academy Avenue is well along and is expected to stimulate investment. Early investment in development of the 31.2 acre 180 Commercial Site brings needed infrastructure that will support master plan implementation.

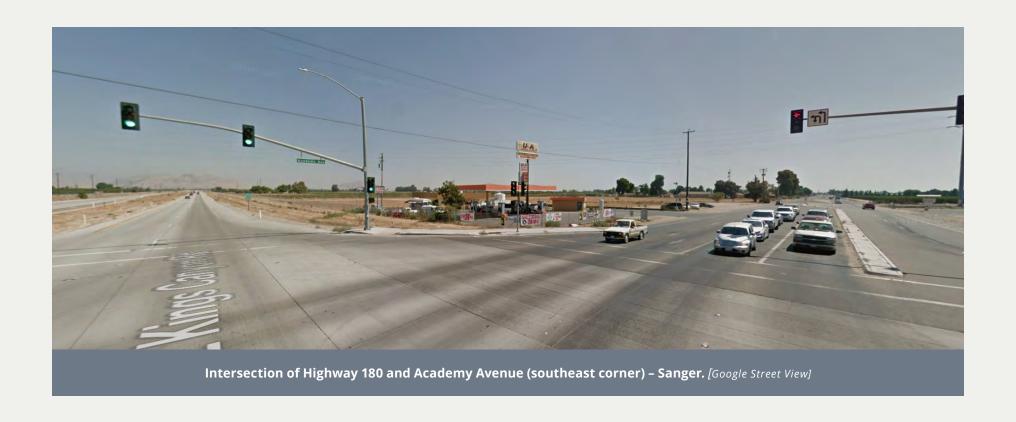
North Avenue Industrial Site » Sanger's industrial base is concentrated along South Academy Avenue - south of East North Avenue and north of East Central Avenue. While the area has several development ready vacant industrial sites still available, the inventory of properties will not meet job creating industrial projects over the longer term. The 50.57 acre North Avenue Site is positioned to quickly reach the market in support of these investments.



CITY OF SANGER

SITE:

# 180 HIGHWAY COMMERCIAL SITE



### SITE: 180 HIGHWAY COMMERCIAL

# TRANSPORTATION & UTILITIES

### **Transportation**

The site is on the SE corner of Academy Avenue and Highway 180. The intersection is the primary entrance to the City Sanger from 180 and experiences heavy traffic to/from areas east of Fresno. The intersection was recently upgraded by Caltrans to improve flow and safety. Caltrans's long term plan is to extend Highway 180 four-lane limited access configuration to Academy Avenue and farther east.

### **Utilities**

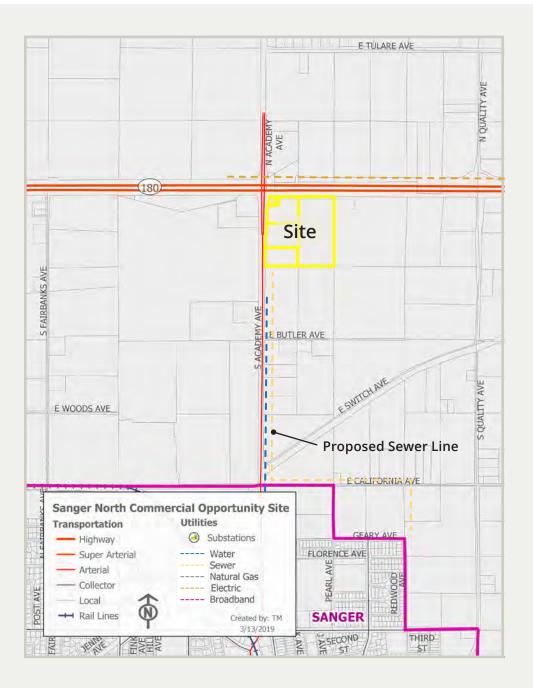
**Water** – Service is now provided by the City of Sanger via a 12" line located approximately 850 feet to the south at the Cal Fire Sanger Station on Academy Avenue.

**Sewer** – Service will be provided by the City of Sanger via a 4" line located approximately 8,800 feet to the south southeast near the intersection of Geary Avenue and Harrison Avenue.

Natural Gas – Service provided by PG&E via a 4" line.

**Electric** – 12kV service is at the site, provided by PG&E. Substation and circuit capacity are sufficient to meet near term needs.

**Broadband** - Not currently available.



# SITE: 180 HIGHWAY COMMERCIAL SITE DATA

### **Strengths**

- The property is within a Federally designated Opportunity Zone.
- The property has convenient access to Highway 180 via the improved Academy Avenue intersection.
- The site is clearly visible from heavily traveled Highway 180.
- Natural gas, broadband, and electric power are in proximity of the site and can support industrial operations. Sanger's General Plan designates this property for Highway Commercial development.
- Proposed development under master planning of surrounding properties are compatible with highway commercial development.
- Intersection is built out to ultimate configuration and should have sufficient capacity to accommodate future development.

### Weaknesses

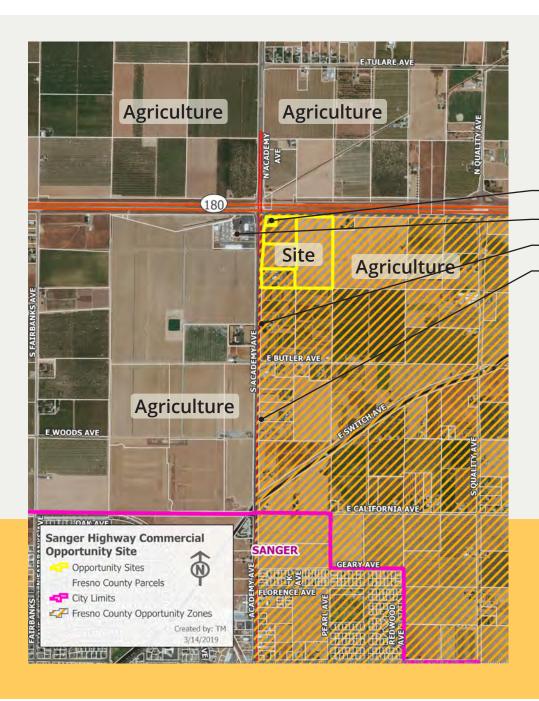
- A wastewater line must be extended approximately 1.7 miles. Funding for the extension has not yet been secured.
- A water line must be extended approximately 850 feet to serve the site. Funding for the extension has not yet been secured.
- The planning process for stormwater management for the 350+ acre proposed annexation is in early stages. Development will be slow until the plan is adopted.

### FRESNO COUNTY OPPORTUNITY SITE(1)

### SITE: 180 Highway Commercial Site

Address	SE Corner - Highway 180 and Academy Ave	
City	Sanger, CA	
Assessor Parcel Number (APN)	314-07-049, 314-07-038, 314-07-037, 314-070-40, 314-07-057	
Jurisdiction (City / County)	County (annexation in process)	
Opportunity Zone (Yes / No)	Yes	
Ownership (Public / Private)	Private	
Current Use	Agriculture, commercial development	
Site Acreage / Developable Acres (est.)	31.2 / 31.2 (5.63+0.24+0.41+18.84+6.08)	
Acreage within flood plain/floodway	None	
Zoning	General Commercial/Highway Commercial	
General Plan Designation	Highway Commercial	
Nearest Limited Access Highway / Distance	180 / 5 miles to limited access	
Rail Access Available to Site	None	
Electric Power Provider	PG&E	
Circuit serving site (kV / location)	12 / Rainbow 1106 at site 115 / Balch-Sanger at site	
Circuit kV capacity (total / peak load)	12.83 / 6.8	
Substation dist. / kV capacity (total / peak)	miles / 29.7 / 17.7	
Natural Gas Provider	PG&E	
Line serving site - location and size	4-inch	
Water Provider	City of Sanger	
Line serving site - location and size	12 inch Main Line - East side of Academy Avenue	
System capacity / average daily use (MGD)	7.8/4.8	
Wastewater Provider	City of Sanger	
Line serving site - location and size	None	
Lift stations / force mains - location	None	
System capacity / average daily use (MGD)	3.0/2.0	
Broadband Provider	None	
Line serving site - location and capacity	None	
Development Status - EIR, CEQA, etc.	Master Plan EIR and General Plan	
(1) Sites were identified by City/County officials in	conjunction with the consulting team as Opportunity Sites that aligi	

(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.



## SITE: 180 HIGHWAY COMMERCIAL

## LAND USE

U&A Mini Mart

Gas station/fast food under construction

Cal Fire Sanger Station

Academy Feed Store

### **Surrounding Land Uses**

The property is at the SE corner of transition zone between commercial/residential development and rural agriculture. Separating the site from urban development is Highway 33 and the SJVRR rail line.

### SITE: 180 HIGHWAY COMMERCIAL

## RECOMMENDATIONS

COMMUNITY: City of Sanger

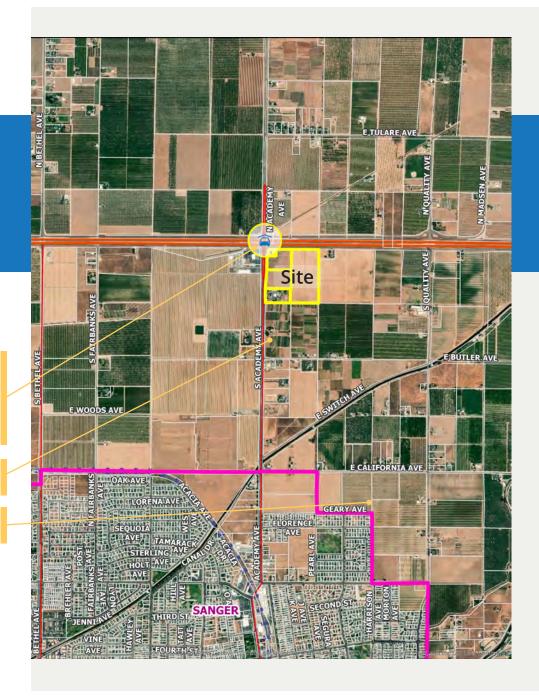
**SITE: Highway 180 Commercial Site** 

CATALYST PROJECT - RECOMMENDED USE:

Mixed use development (highway commercial, retail, hospitality, office)

### Investments required to ready property for market

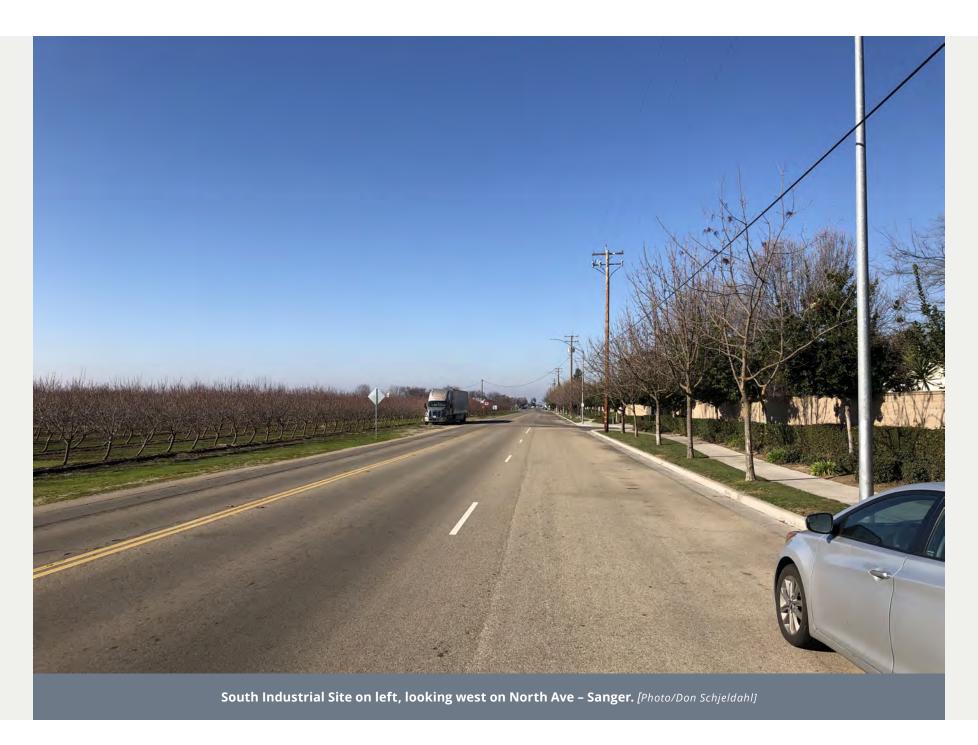
- 1. Caltrans has a long term plan to extend Highway 180's four-lane limited access configuration, now ending 5.8 miles to the west, to include Academy Avenue. Recent intersection improvements should accommodate additional development and the route of the future limited access roadway.
- 2. Secure funding for water line extension from the Cal Fire Station on Academy Avenue to the site
- 3. Secure funding for wastewater line extension from the Sanger urban boundary near Harrison Avenue to the site.
- 4. Complete the stormwater plan.



# CITY OF SANGER

# SITE: NORTH AVENUE

INDUSTRIAL



### SITE: NORTH AVENUE INDUSTRIAL

# TRANSPORTATION & UTILITIES

### **Transportation**

The site has access from Academy Avenue via East North Avenue and from Newmark Avenue via East North Avenue. The Newark Avenue route has the advantage of connecting directly with East Central Avenue which leads to a Highway 99 interchange in Fresno. This route also mostly avoids residential development on the north side of North Avenue and travel through Sanger's city center. West of the site, North Avenue is a five-lane road with center turn lane. At the property line North Avenue becomes a two-lane roadway.

### **Utilities**

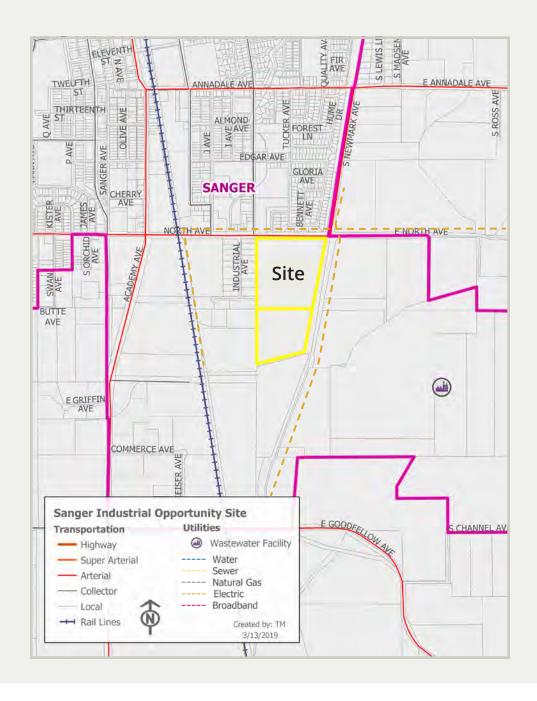
**Water** – Service provided by the City of Sanger via a 12" line located on North Ave.

**Sewer** – Service provided by the City of Sanger via a 24" line located on North Ave.

Natural Gas – Service provided by PG&E.

**Electric** – 12kV service is at the site, provided by PG&E. .

**Broadband** – Service provided by Comcast.



# SITE: NORTH AVENUE INDUSTRIAL SITE DATA

### **Strengths**

- Water, wastewater, natural gas, and broadband services are in proximity of the site and can support industrial operations.
- Electric power is available at the site from the Rainbow 1105 circuit.
- Surrounding land uses are compatible with industrial operations.
- The property is flat and will require minimal site preparation.

### Weaknesses

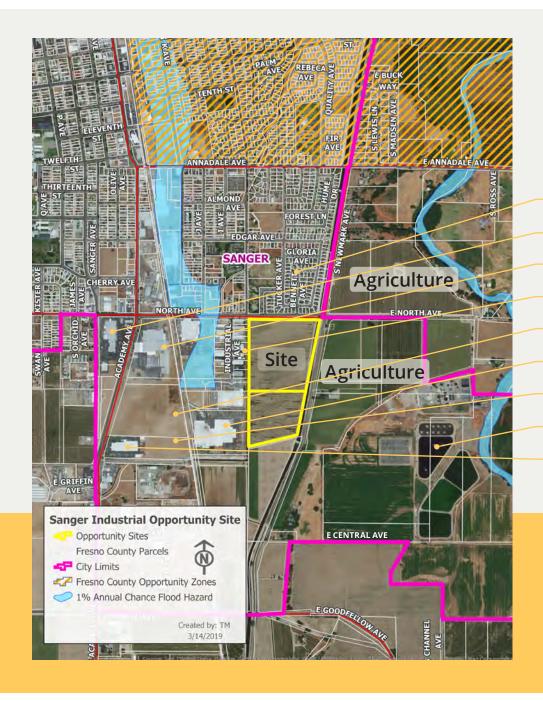
- Capacity of PG&E's Rainbow 1105 is nearing its limits. Investment in the substation will be required to increase capacity.
- North Avenue is a two-lane roadway starting at the property line and going east. West of the site the road is four lanes with a center turn lane and better suited for industrial traffic.

### FRESNO COUNTY OPPORTUNITY SITE(1)

### SITE: North Avenue Industrial Site

Address	SW Corner - Centerville Kingsburg Canal / North Ave
City	Sanger, CA
Assessor Parcel Number (APN)	332-04-026, 332-04-028
Jurisdiction (City / County)	City
Opportunity Zone (Yes / No)	Yes
Ownership (Public / Private)	Private
Current Use	Agriculture
Site Acreage / Developable Acres (est.)	50.57 / 50.57 (30.57+20)
Acreage within flood plain/floodway	None
Zoning	ML - Light Manufacturing
General Plan Designation	Heavy Industrial
Nearest Limited Access Highway / Distance	99 (Central Ave) / 11.7 miles
Rail Access Available to Site	None
Electric Power Provider	PG&E
Circuit serving site (kV / location)	12 / Rainbow 1105 at site
Circuit kV capacity (total / peak load)	12.83 / 11.52
Substation dist. / kV capacity (total / peak)	miles / 29.7 / 17.7
Natural Gas Provider	PG&E
Line serving site - location and size	Contact city for info
Water Provider	City of Sanger
Line serving site - location and size	North Ave./12" main line
System capacity / average daily use (MGD)	7.8/4.8
Wastewater Provider	City of Sanger
Line serving site - location and size	North Ave./24" main line
Lift stations / force mains - location	None
System capacity / average daily use (MGD)	3.0/2.0
Broadband Provider	Comcast
Line serving site - location and capacity	Contact city for info
Development Status - EIR, CEQA, etc.	Contact city for info

(1) Sites were identified by City/County officials in conjunction with the consulting team as Opportunity Sites that align with local target industries. Property owners were not consulted. Property availability to-be-determined.



# SITE: NORTH AVENUE INDUSTRIAL LAND USE

Residential

Southgate Shopping Center

Del Monte Fresh Produce

Small building light industrial Park

Shovel Read Industrial Site

International Paper

Shovel Read Industrial Site

Sanger Wastewater Treatment Plant

**ADCO** Manufacturing

### **Surrounding Land Uses**

The property is on the eastern edge of Sanger's historic industrial district. Single family residential development is located north of the site across North Avenue. Land to the east includes citrus agriculture and the Sanger Wastewater Plant.

### SITE: NORTH AVENUE INDUSTRIAL

## RECOMMENDATIONS

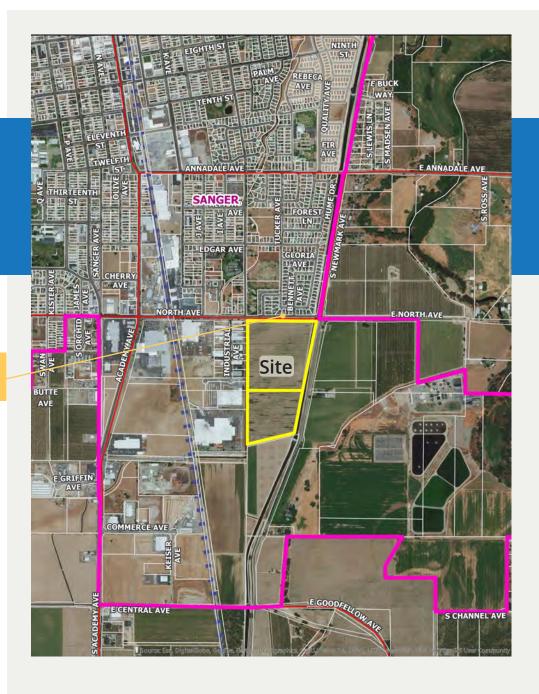
COMMUNITY: Sanger

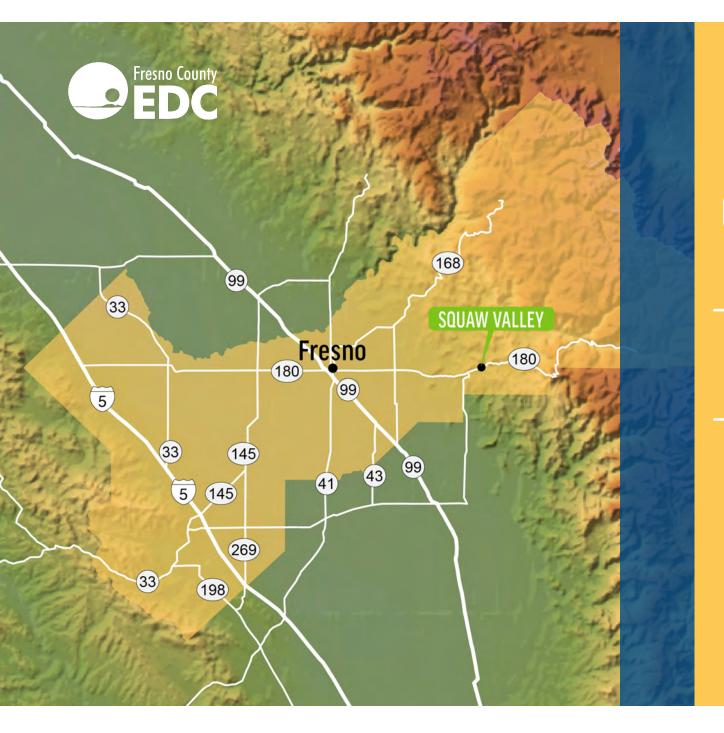
SITE: North Avenue Industrial Site

CATALYST PROJECT – RECOMMENDED USE: **Light and heavy industrial, distribution** 

## Investments required to ready property for market

- 1. Extend the 5-lane configuration of North Avenue to Newmark Avenue to improve access and safety for vehicles accessing the property.
- 2. Develop a master plan that shows development alternatives for the property. Include engineering and cost estimates for extending utility services to the site.
- 3. Increase electric power capacity on the 12kV distribution circuit that serves the site.

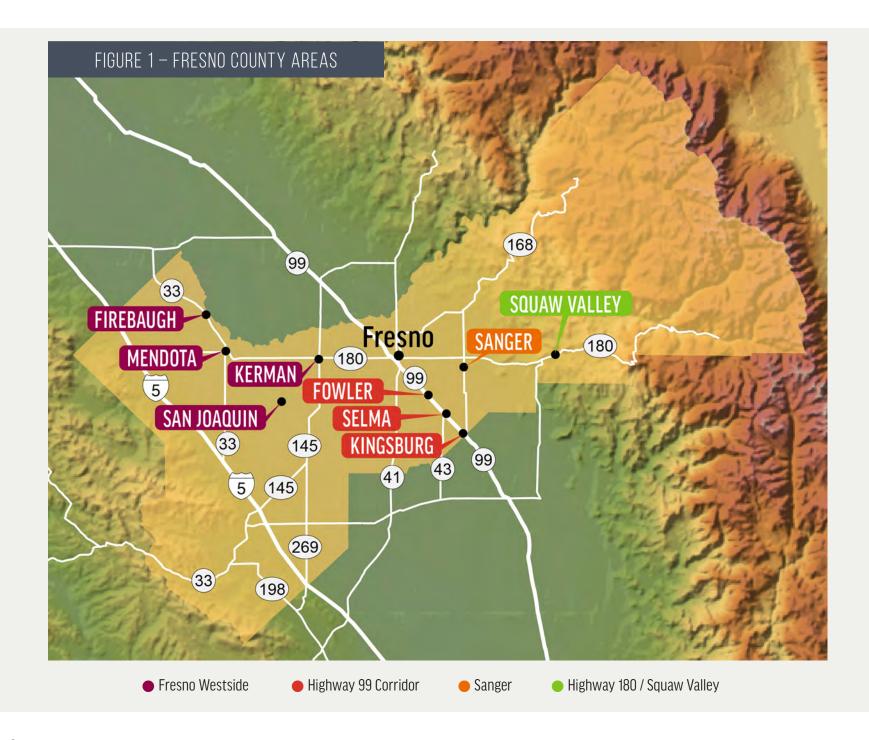




# FRESNO COUNTY OPPORTUNITY ANALYSIS

HIGHWAY 180 / SQUAW VALLEY

SEPTEMBER 2019 ]



# HIGHWAY 180 / SQUAW VALLEY INTRODUCTION

In collaboration with the County of Fresno, local cities, and community partners, the mission of the Fresno County Economic Development Corporation (Fresno EDC) is to market Fresno County as the premier location for business prosperity. The EDC facilitates both site selection for new businesses and assists in the retention and expansion of businesses through alliances with collaborative partners. It is within the spirit of this mission that an Opportunity Analysis of selected county communities and properties is undertaken.

Opportunity Analysis objectives are twofold: 1) Identify sites in each community that can support job creating investments that will catalyze investments on other area properties, and 2) Compile a list of community and property assets that offer a value proposition each community can use to pursue development opportunities. The ultimate goal is to attract projects that put each community on a trajectory for continuous growth.

### **Project Study Area**

The countywide initiative includes areas with markedly different social, economic, infrastructure, and development characteristics. Consequently, **Highway 180 / Squaw Valley** was deemed a stand-alone area in the region with unique assets and challenges. Separate reports in this series are available for these regional groupings:

- 99 Corridor Communities Selma, Kingsburg, Fowler
- Westside Communities Kerman, Firebaugh, Mendota, San Joaquin
- Sanger

### Goals - Highway 180 / Squaw Valley

To strengthen and diversify commercial development and better serve visitors and local residents alike:

- Define market opportunities/gaps for commercial development.
- Identify 'best bet' opportunity sites/areas for near-term development.
- Provide user-friendly marketing facts and a game plan to attract development.

### Process - Highway 180 / Squaw Valley

Stakeholder interviews, 3 day site visit, focus groups and participation in the January 15 community meeting laid the foundation for the steps below.

- 1. Market review/overview of the Highway 180 corridor's retail potential.
- 2. First impressions visitor assessment of the Highway 180 corridor to evaluate visitor experience, tourism infrastructure and opportunities to increase visitor spending before reaching Kings Canyon (on-site).
- Hubs/clusters and amenities evaluation to leverage for development areas (sites and buildings) and potential for lodging and other visitorrelated amenities (on-site).
- **4. Action plan** with steps for generating quick results and developing amenities/projects for longer-term economic impact.

### Outcomes - Highway 180 / Squaw Valley

The remainder of this report facilitates these desired outcomes:

- Realistic picture of retail/commercial development potential.
- Authentic reflection of the visitor experience and climate for attracting and retaining visitor spending.
- List of priority development sites and projects to bring to fruition.
- Key market facts and messages targeting development community.
- Game plan with clear next steps, initiatives at the community and county level and defined roles to succeed in having a positive economic impact.

### HIGHWAY 180 / SQUAW VALLEY

# DEVELOPMENT OPPORTUNITY

### Highway 180 / Squaw Valley: Kings Canyon – on the path to success

Fresno County's Sierra Gateway Scenic Highway 180, together with the Squaw Valley area, has three key areas of opportunities: **1.** Large, growing visitor market; **2.** Significant untapped retail potential; and **3.** Development sites ready for investment. Squaw Valley is emerging as the visitor gateway and "base camp" to the Kings Canyon National Park for travel and adventure. The area also offers opportunities to capture more visitor stops and stays vs. drive-through traffic to the park and to serve both visitor and local residents with expanded retail offerings.

# Why is Highway 180 / Squaw Valley an Opportunity Area for visitors to Fresno County and Kings Canyon National Park?

 With Highway 180 as the scenic draw to Kings National Park, Squaw Valley is poised to be the base camp for visitors

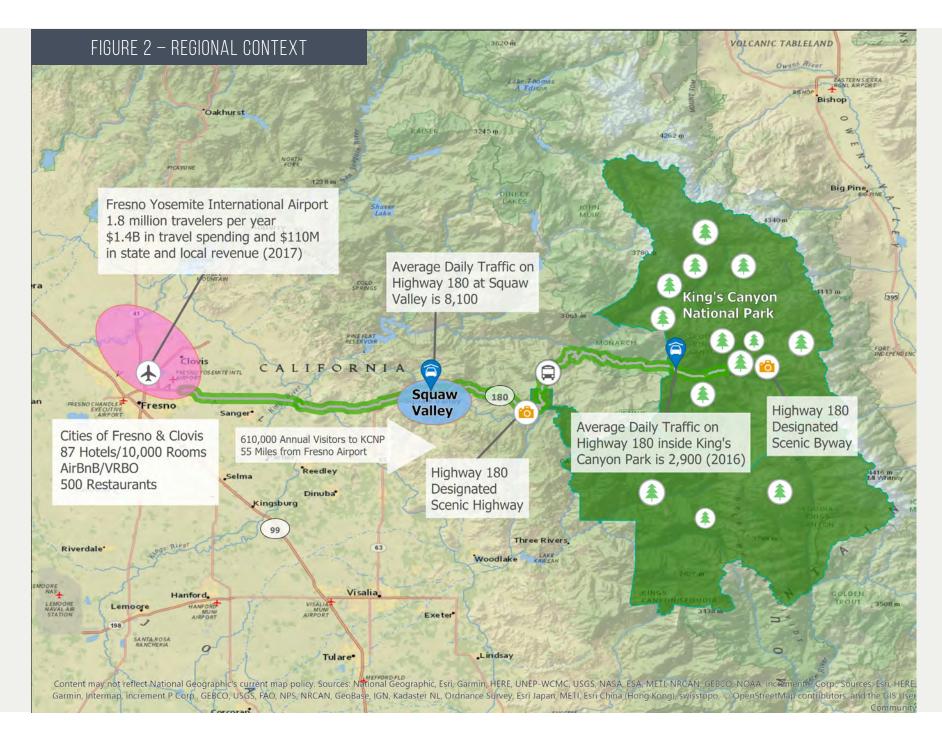
Highway 180 east is a designated California Scenic Highway (the Sierra Gateway Highway) and provides easy access to a recreational paradise

for Central Valley and Fresno visitors. From Fresno to the entrance of Kings Canyon National Park is an 80-minute drive rising from the valley floor to over 5,000 feet at the park entrance—all the while beckoned by the majestic beauty of the Sierra Nevada mountains. Just off the highway is a rich diversity of recreation adventures from hiking and kayaking to hang gliding and cycling (see **Figure 2**).

Squaw Valley is situated on scenic Highway 180, just 20 miles from the entryway to Kings Canyon National Park. With the greatest concentration of services on this road, Squaw Valley is well-positioned to be the launch point/base camp for travelers through the area. Average daily traffic on Highway 180 at Squaw Valley is 8,100 vehicles. The Squaw Valley area is eager to capitalize on visitor traffic and to leverage the many area attractions through expansion of commercial goods and services.

Visitor counts to Kings Canyon National Park are at record levels in recent years at over 600,000, with an estimated 21% being international travelers. The National Park Service surveys reveal that in 2016, 607.5K visitors to Kings Canyon spent nearly \$53M in local gateway regions. These expenditures supported 793 jobs, \$22.7M in value added services, and \$67M in economic output in local economies surrounding the Park.

Over 8,000 vehicles per day travel on Highway 180 in Squaw Valley



## 2. Fast Growing Fresno County Visitor Market bring Customers to Squaw Valley's Doorstep

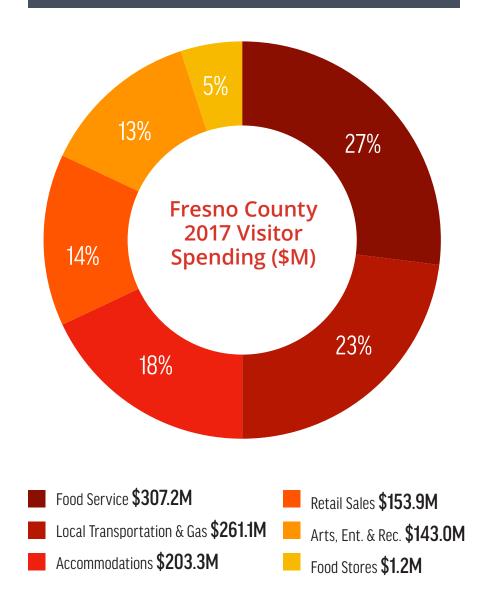
Fresno-Yosemite International Airport recorded 1.8M travelers in 2018, up 36% from 2010. About 50% visit for recreation and play. International visitors total about 13%, with the top groups from Germany, Canada and the United Kingdom. Fresno County visitor research shows the easily accessible national parks (Kings Canyon, Sequoia and Yosemite) are the main draws to the area. Fresno-Clovis hotel occupancies in 2018 were consistently over 70% year-round. The Convention and Visitors Bureau reports there are 87 hotel properties (and a dozen under construction), 10,000 rooms and 500 restaurants.

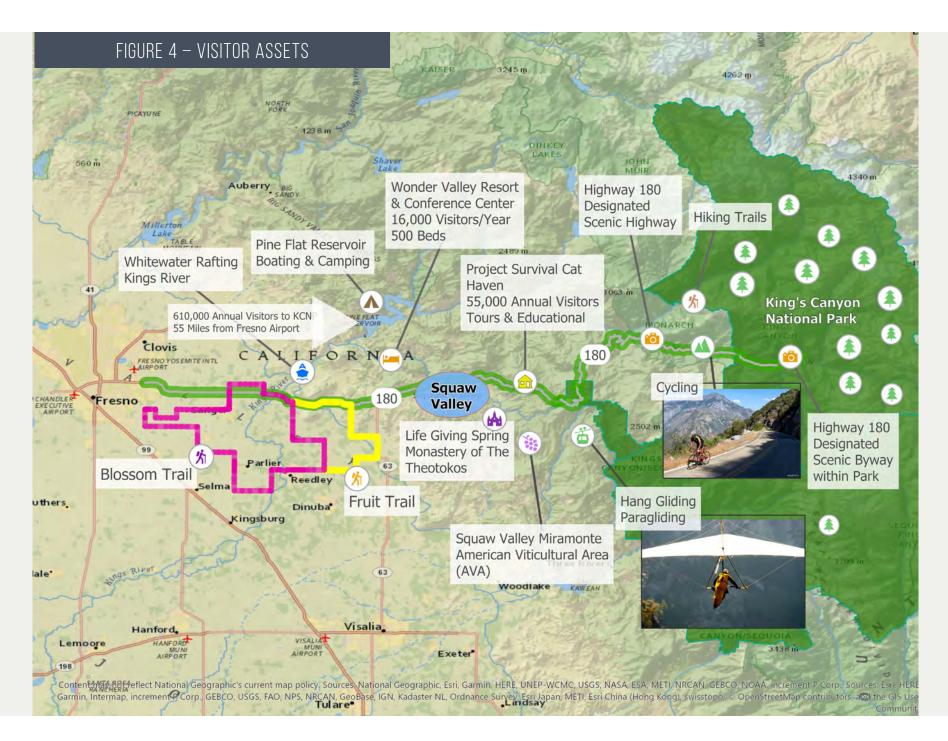
Tourism spending in Fresno County (\$1.4B/year) has been growing steadily over the last decade, with 2017 seeing an even higher bump in visitor direct spending. Half of the spending was generated by food service (restaurants) or local transportation and/or gas stations. Retail sales account for \$154M (see **Figure 3**).

### 3. Ag-Tourism is fast growing

With the Farm to Table movement and consumer interest in knowing where food comes from, Fresno County's Blossom and Fruit Trails are bringing thousands of visitors (cyclists and vehicles) including bus tours to the east Highway 180/east Fresno area every spring. The Fruit Trail farm stands are open several months a year. The 62-mile self-guided tour features dozens of enterprises from fruit orchards and citrus groves to vineyards and historical points of interest. The Fruit Trail emphasizes beauty, fresh fruit and the agriculture of the region. It includes numerous farm stands, farmers markets and related attractions from May through September. (See **Figure 4**)

### FIGURE 3 - VISITOR SPENDING (FRESNO COUNTY, 2017)





### 4. Emerging wine region - Fresno County

Grape growers and wineries are poised to grow with the newly designated Squaw Valley-Miramonte American Viticultural Area (AVA) and recently adopted business-friendly code to encourage small winery development. Ag-tourism in the county includes 13 operating wineries; within the Squaw Valley area there are two wineries and six vineyards operating to date.

### 5. Unique "hidden" assets

A wide array of unique assets exist to attract visitors for day trips and overnight excursions (see **Figure 4**). If combined as a marketing destination, they could generate 1- or 2-day visits. Among the many nearby attractions are:

- Project Survival Cat Haven 7 miles from Squaw Valley hosts 55,000 visitors annually for tours and educational programs.
- Wonder Valley Resort and Conference Center Less than 7 miles to Squaw Valley hosts destination weddings, group tours throughout the area, conferences and youth camps. Largest employer in east Fresno County (220 peak season) with 73 rooms, 500 beds and \$8M tourism dollars annually, with visitors from 20 countries.
- Lodging Diverse, mid-priced lodging in the area ranges from modern Clingan Cabins and over a dozen quality Airbnb options to Sequoia RV Park and Squaw Valley Motel. The absence of a transient occupancy tax (TOT) is appealing to tourists.
- Hang gliding In nearby Dunlap.
- Pine Flat Lake Popular boating destination off Highway 180.
- Kings River Overnight canoe trips, white water rapids.
- Rodeo Squaw Valley hosts 4 rodeos/year at the local rodeo grounds.

## Why is Highway 180/Squaw Valley a critical retail market opportunity?

Beyond meeting visitor needs, local market opportunities are strong. Squaw Valley area residents are significantly under-served in most retail categories, with a retail gap of \$56.6M out of potential spending of \$70M. As one example, the nearest full-service grocery and drugstore are 45 minutes away. Restaurant and entertainment options, of high importance to both residents and visitors, are also extremely limited (see **Figure 5**).

### What are the development opportunities?

Highway 180 locations offer excellent access and visibility for retailers, especially in the Squaw Valley/Clingan Junction areas.

• The **Squaw Valley section** of the Highway 180 corridor offers an existing development cluster of highway commercial and services including the post office, a small hardware store, gas station, restaurant, motel, realtor offices, medical clinic and more.

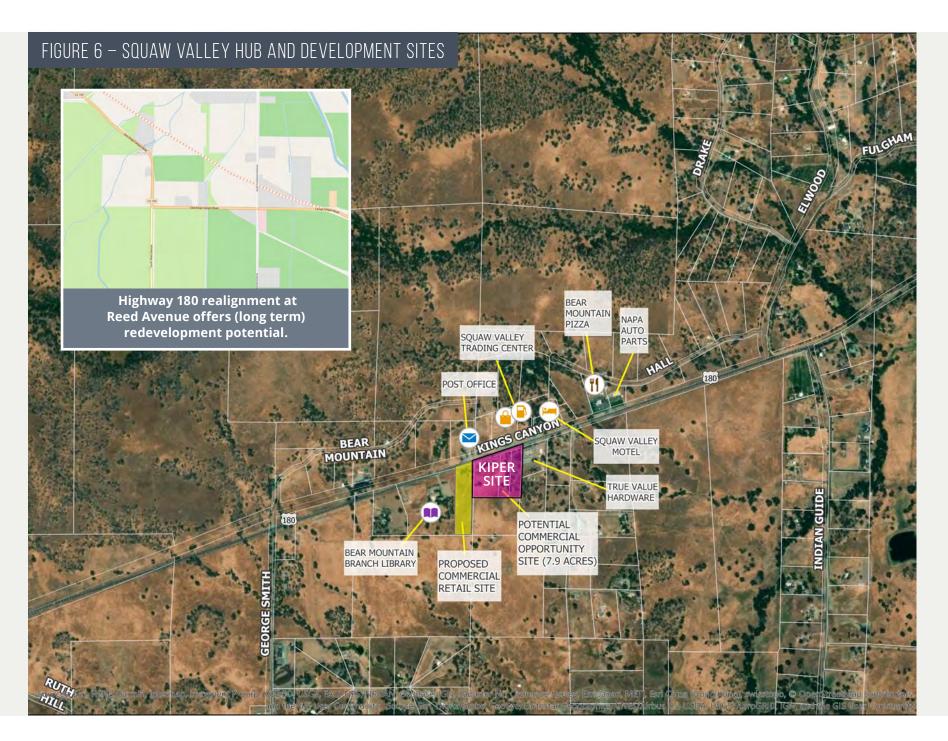
The Retail Gap is \$56.6M.
Less than 20% of potential local spending is being captured by local businesses.

- On the south side of Highway 180, at the entrance to Squaw Valley is **Bear Mountain Library and the adjacent walking trail/arboretum**. These two recreation/cultural uses attract community members throughout the day. Dollar General is proposed for the adjacent property to the east and the potential exists for a civic and shopping center development. Note that this site requires rezoning to a Mountain Urban in order to be developed and compatible with commercial uses.
- On the eastern edge of the proposed Dollar General is a 7.9 acre prime retail site (**Kiper site**), with highway frontage offering strong development advantage, especially if access and parking can be shared with other commercial uses. **Figure 7** is a concept drawing of a town center-type destination. As with many undeveloped Squaw Valley sites, rezoning and infrastructure options need to be addressed.
- Figure 6 inset portrays one other potential development area (Reed Avenue) for consideration, 12 miles east of Squaw Valley. The intersection of S. Reed Avenue and E. Kings Canyon Rd (Hwy 180) is being transformed by the new alignment and expansion of Highway 180 which will create a new access ramp at S. Reed. Only 2 commercial establishments are nearby: a fruit stand at S. Reed and the destination dining establishment, School House Restaurant and Tayern at S. Frankwood Ave.

Longterm, the new highway access point may encourage convenience commercial development in the vicinity if population density increases. Several parcels are owned by the Moore Family or the State of California, which could make assembly for a small shopping center easier to develop. However, this is not a hotel site for the foreseeable future. It is only a 20-minute drive to Fresno's sizable lodging base and the area lacks any draws for visitors, except the restaurant.

Constraints include the need for rezoning from limited and exclusive agriculture, sewer and water infrastructure for large scale commercial development and most importantly, very limited market demand from the local population, visitors and employers.







# SQUAW VALLEY COMMERCIAL OPPORTUNITY SITE

Building B: 10,000 SF Grocery

Building C: 14,000 SF Retail

Building D: 24,000 SF Retail

Parking Stalls: 550 (18' x 8.5' per stall)

- E Coffee Kiosk and Food Carts
- F Recreation/Rest Area and Dog Park
- G Multi-Tenant Monument Sign at Entry

### HIGHWAY 180 / SQUAW VALLEY

# CONSULTANT OBSERVATIONS

## Opportunity analysis observations and recommended next steps

While no clear community vision or plan exists for the Highway 180 visitor economy or the Squaw Valley area, focus groups, interviews and public engagement (via Supervisor Nathan Magsig's community meeting on January 15, 2019) revealed strong interest in:

- Local employment opportunities
- Increased visitor stops and overnight stays
- Focus on new economy (beyond hospitality) and retaining youth in the area
- Addition of basic shopping (e.g., grocery) and reduction of drive time for convenience goods
- Solution for community-wide water storage

During the Chabin/Marketek team site visit, January 14-16, many of the above themes were reinforced in the business focus groups and numerous one-on-one interviews. Local business owners also identified several constraints to business/community development and opportunities to address that are woven into the consultant observations and recommendations that follow.

### Constraints to development opportunities

There are significant constraints to any proposed development, new or existing:

#### 1. Infrastructure:

- The absence of a sewer and water system is a major impediment for development, particularly for larger mixed-use development.
   Smaller developments utilizing individual septic system are possible.
- Individual business water storage requirements, which have been changing because of the "fire-risk" area, are also becoming a major constraint and cost prohibitive for business.
- Note on water storage, community members/business owners expressed desire to explore a solution with the County for a community-wide water storage system or community water fire suppression system.
- At this time the County is not pursuing the creation or management of county services in the unincorporated area, so other mechanism would need to be explored to address infrastructure issues.

### 2. Regulations:

- California's Wildland-Urban Interface Code will likely add considerable costs to any new developments.
- Rezoning can be lengthy and costly requiring traffic study, mitigation, infrastructure improvements and environment study/mitigation, as required by the state.
- Until solutions for infrastructure can be identified, particularly fire water storage, new development will lag other areas. Other factors contributing to development challenges include:

- 3. Consensus. As noted in the introduction, there is no specific plan or vision document for the area. The result is a lack of community consensus on the type and scale of development that is compatible and of economic value to the area. This is an impediment and risk for developers, small business and investors.
- 4. Perceptions. Business and property owners perceive there to be an absence of streamlined business development process for the area, a single point of contact at the County and consistent direction on specific development plans which has led to frustrations with and perhaps a lack of understanding of rules, regs, fees, requirements. Perception for many is trying to do business is too onerous for many small business owners. The County does have specific services available to business to help them through the regulatory process. The community may not be aware of Fresno County's relatively new Rapid Response and Building Plan Check program that works to simplify the regulatory process. More information is available at Development Services Division (559) 600-4497.
- 5. Available Properties. All of the above contribute, in part, to the lack of properties and sites publicly available. The overall appearance of commercial corridor is a deterrent. Businesses report that the Caltrans right-of-way (for future Highway 180 expansion) takes up nearly 150 feet from the edge of the highway into their property. There is no edge to the road or the commercial area. It's a wide swath of asphalt/gravel and curb cuts.
- **6. Financial Feasibility.** Developing in the Squaw Valley area is likely be relatively expensive due to additional regulations and water storage requirements.

### Challenges for attracting visitors

- 1. Limited Highway 180 signage to Squaw Valley, Kings Canyon and identifying the scenic byway and key recreation assets.
- 2. No one is responsible for actively marketing the area. Absence of welcoming signage, visitor information, restrooms, wayfinding signage and other key amenities to encourage visitor stops. Posted highway speed limit is 55. Signage and amenities are critical to slowing traffic and getting people out of cars, exploring and spending money.
- 3. Squaw Valley corridor is disconnected with properties and businesses spread out through the approximately 1-mile corridor. There is a mix of disconnected commercial and retail uses. No streetscape, sidewalks, walkability, bike lanes/amenities or pedestrian crossings. Contributing to the absence of a sense of place are several vacant-looking, tired and underutilized properties. TLC, a fresh coat of paint and good signage would go a long way to improving the image of businesses.



- 4. Related to #3 above is the overall appearance of commercial corridor is a deterrent. Businesses report that the Caltrans right-of-way (for future Highway 180 expansion) takes up nearly 150 feet from the edge of the highway into their property. There is no edge to the road or the commercial area. It's a wide swath of asphalt/gravel and curb cuts.
- 5. No brand identity or coordinated marketing to capture more visitors. Businesses commented there is significant visitor confusion over the Squaw Valley name which competes with Squaw Valley-Tahoe for any attention on the web. Basic marketing tools are lacking, including a visitor website, marketing brochure/rack card of restaurants/ lodging/services, etc. With over a dozen different attractions or proprietors promoting their businesses and the area independently, a coordinated effort is greatly needed.
- 6. Lodging and dining choices are especially limited along the highway. While there are a variety of options for overnighting outside the park (from motel to cabins and an RV Park), visitors are left to their own devices to locate them. Overnight stays produce 3-4 times the economic impact for local economies, and most agree Squaw Valley could put more heads in beds with an attractive lodging and restaurant mix. (See **Appendix A** for existing lodging facilities.)

### Moving forward

The stakeholders interviewed fully understand the constraints, challenges and opportunities and have a willingness to come together to begin charting the future to realize enhanced economic opportunities. Given the constraints and challenges, three key steps are recommended:

- Organization
- 2. Brand Identity and Marketing
- 3. Placemaking and Beautification

Public-private-community collaboration most often generates successful results. The new Fresno County business-friendly code to reduce barriers for small wineries serves as a model process.

### 1. Organization

a. Leverage the interest and build the capacity of local leadership by supporting a community-driven coalition or organization. Community members repeatedly turn to the County for help in the absence of local government, an organization or a specific plan to guide progress. Interest was expressed in a Municipal Advisory Council (MAC) or a like organization that is Squaw Valley focused. Once local consensus is reached on the type of coalition or group, Squaw Valley residents should make a direct request to the County of Fresno to participate as a member of the citizen-led group to address enterprise development, regulatory barriers, and other ways to empower residents. Invite County and EDC to conduct a short information session on existing tools for business and property owners to reduce regulatory barriers, such as the RED and Rapid Response Teams. Include discussion of options to address sewer and water storage systems.

A simple action plan (see **Example A**) could be presented to the Board of Supervisors showing how the citizen-led group would organize and what actions they would undertake.

**b. Define role of citizen-led group:** Engaged citizens can help address business concerns and work with the County to demonstrate how

### **Example A: Simple Action Plan for a Citizen-Led Group**

# QUICK WINS

- ➤ Organize a community clean-up campaign to get ready for summer visitor season. Make it fun and promote it widely: "Rally for Squaw Valley!"
- ➤ In conjunction with the clean-up, develop a Business Beautification program on private property. Gardening/arts partners and schools may be of assistance to plant native flowers/greenery, add banners and paint, clean up signage, etc.
- ➤ Form a visitor marketing group and action plan to begin sharing goals, ideas for joint marketing and engaging partner organizations. Invite Fresno CVB to share their knowledge, experience and best practices.
- ➤ Encourage and support the development of more small vineyards and wineries as a key hook for enticing visitors to stop.
- ➤ Visit the Three Rivers community or invite representatives to Squaw Valley to share how that town became a gateway community (threeriversvillage.com).



- > Support residents interested in forming a community-based coalition, group or action team to move projects forward.
- Position Squaw Valley as the Base camp/Gateway to Kings Canyon Park (see case study examples in Appendix B) with website, visitor collateral, social media, placemaking strategies, etc.
- ➤ Implement a Highway 180 signage and beautification plan with Caltrans assistance. Incorporate directional, wayfinding and business signage.
- ➤ Organize targeted business development to locate a full-service grocer, a bank, more dining options, a laundromat, pharmacy and other key businesses identified by local residents. Cluster businesses in close proximity to Bear Mountain Library as conveyed by the concept/vision in **Figure 6**. This compact, sustainable development creates the potential for Squaw Valley to truly be a visitor hub as well as community center and the basecamp for Kings Canyon.
- ➤ Inventory existing properties suitable for lodging (e.g., former camps/resorts off the highway) and promote lodging opportunities. Clingan's Junction Cabins are an excellent example of a successful redevelopment.
- ➤ Explore formation of a community water storage system partnership to meet water storage requirements of Cal Fire and collaborate on cost-effective alternatives for fire suppression (e.g. foam-based solutions). Prather, CA was noted as an example.
- > Seek seed funding for plan development through U.S.D.A. or other community or economic development funding sources.

development can be cost effective in the era of strict Cal Fire, Caltrans and state requirements and empower group to lead organizing for action. Focusing on an immediate, tangible issue such as fire suppression infrastructure, may help structure the focus of the group.

- **c. Prioritize areas of concern/constraints** relating to "doing business" (e.g., water) to work on with the County. Begin by better promoting existing County business services, such as Rapid Response and RED Team, through the County's website, printed collateral, during community meetings and in-person business outreach.
- **d. Prioritize marketing and placemaking** actions. Form a few organized action teams.
- e. Build consensus among the businesses on areas and steps forward.
- **f. Identity resources/needs** to leverage resources where other organizations could assist/support the citizen-led group with implementation.
- g. Work with the Economic Development Corporation and Fresno County to hire an Americorp VISTA staff member to help shepherd follow-through on these key action items. A rural business "ombudsman" would also add significant value.

### Potential Organizational Challenges

There are always potential challenges that should be considered before organizing for action, such as:

1. Busy sole practitioners without any local models of how to work collaboratively across the community (review other citizen-led coalitions and models).

- 2. There appears to be a lack of communication within the community and with visitor and economic development partners (need partner building).
- 3. Chamber of Commerce exists but does not function as a business/ community promotion organization.
- 4. Lack of community consensus surrounding the types of potential retail users wanted to meet local needs (e.g., preference between national chain vs. local grocer).
- 5. Perceived lack of funding, resources and staffing at both the County and local levels. E.g., Squaw Valley area does not qualify for Community Development Block Grants. Tourism marketing has been cut at the County. Local businesses may be spurred to work jointly but need small town models.

### 2. Brand Identify and Marketing

Creating a brand identity and collaborative marketing is one of the most logical and important next steps to bringing the community together to create synergies for promoting the area. There are over 20 existing organizations as well as the local businesses that could join in collaborative marketing for the area.

- **a. Define the Squaw Valley community brand identity** and key hospitality messages. *Examples: "the Secret Sequoia," "Three Mountains-Three Days."* Research other small-town brands, especially those adjacent to recreation and nature-based attractions. Form a work team, identify a local project champion and bring together visitor marketing partners for a planning and doing event.
- **b. Adopt an Overarching Concept** such as positioning Squaw Valley as the "base camp" to Kings Canyon National Park, providing diverse

mountain recreation. See case studies of basecamp communities outside national parks in Appendix B, including: Springdale-Zion National, Estes Park-Rocky Mountain National, Tusayan-Grand Canyon. To launch the marketing, prepare a 90-day, 6-month and 1-year action strategy using the sample outline.

- **c. Inventory all existing promotional campaigns** and events where the area can be featured and/or leverage opportunities.
- d. Form a local cooperative marketing organization. Include, leverage and build on the excellent professional marketing of area partners such as Wonder Valley, Cat Haven, National Park Service and more. Over 20 organizations (mostly nonprofit) are promoting various assets along Highway 180 and in the Squaw Valley area—all are potential partners and contributors to the Highway 180/Squaw Valley story. Bring everyone

together for a half-day visioning/education forum and to begin building the Highway 180 marketing roadmap.

- e. Link all local business, attractions and visitor-related organizations to one website and visitor Facebook page and through collateral material.
- **f. To grow the business base, build an authentic message** and story of being development-friendly. This may include local businesses who can be positive ambassadors for the community, a single point of contact at the County, market information and helpful resources to find a successful location. Locals noted that Three Rivers and Madera County are models for Squaw Valley/Fresno.
- g. Review the Visitor Marketing Roadmap Outline (see below.)

### **Visitor Marketing Partners & Collaborators**

- Audubon Society
- California Scenic Byways
- Caltrans signage
- CA Office of Tourism
- Cat Haven
- Central Valley Community Foundation
- Central Valley Hang gliding and Paragliding Assoc.
- Dunlap Band of Mono Indians
- Fresno County CVB
- Kings Canyon National Park (NPS)
- Kings River Conservancy

- Sanger Chamber
- Sanger Art Station east Fresno County artists
- Sierra Business Alliance
- Sierra Conservancy
- Sierra Gateway Trust, Inc.
- U.S. Forest Service- Sequoia National Forest, Dunlap
- Viticulture and Enology Association of Squaw Valley-Miramonte
- Wonder Valley Resort
- Yosemite/Sequoia Resource Conservation Development

### **Visitor Marketing Roadmap Outline**

- a. Goals and Strategic Focus
- b. Partners and Sponsors
- c. Target Market Profile
- d. Communication Channels (Social media, collateral, word of mouth)
- e. Brand Campaigns
- f. Annual Events, Experiences, Campaign Calendar
- g. Campaign Themes by Season
- h. Project Action Programs
- i. Evaluation, Measurement, Reporting
- j. Business Plan/Organization

### 3. Placemaking and Beautification

Squaw Valley/Highway 180 greatly needs a "there there" – some impression of a town center or sense of place to signal to passers-by this is the place to stop and learn about where they are, stretch their legs, use the restroom, have a bite to eat, get provisions, walk the dog and more. Ideally, clustering all of these activities together to form a "critical mass" is fundamental to developing an identifiable and desirable community place. (See Project for Public Spaces' 11 Guiding Principles in the **Appendix C.**)

a. Build on the existing Squaw Valley anchors of the Bear Mountain Library and adjacent County-owned walking trail/arboretum and create a high-level site or concept plan depicting how a variety of uses can colocate to create a vibrant center that both local residents and visitors can utilize and enjoy. Adjacent to the Library parking lot is a paved area and adjoining "greenfield" under site plan review for potential Dollar General. Leverage any new development there with a goal to create a cohesive retail development with grocer and services.

Ideas generated by local business leaders combine a visitor welcome center/rest stop and public plaza and include:

- Public bathrooms
- Dog walk area
- Electric charging station
- Information kiosk/interpretative signs
- Picnic area
- Food trucks
- Farmer's market

### FIGURE 8 - HIGHWAY EDGE "BEFORE"

### Before...



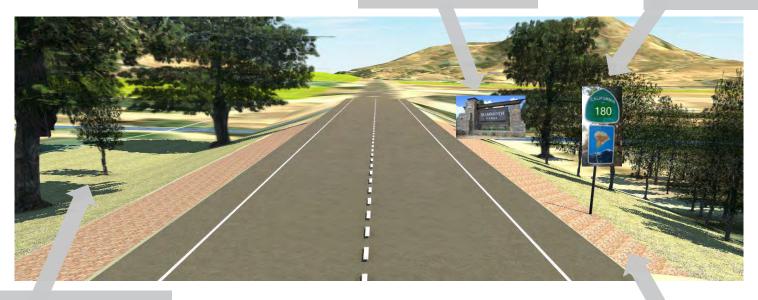
- b. Beautification of the ½ to 1-mile Squaw Valley stretch of Highway 180 corridor is an essential strategy to slow traffic down and portray Squaw Valley as a destination, with landscaping, banners, flower baskets, appropriate welcome signage, lighting and more. Caltrans has published at least two helpful booklets: a *Scenic Highways Guideline* booklet that provides do's and don'ts and another on *Landscape Architecture Program* with many links to visual aesthetics.
- www.dot.ca.gov/hq/LandArch/16\_livability/scenic\_highways/ guidelines/scenic\_hwy\_guidelines\_04-12-2012.pdf
- www.dot.ca.gov/design/lap/

#### ... and After

# HIGHWAY 180: DESIGN SUGGESTIONS FOR SCENIC ROUTES

Monument signage for businesses and communities

California Scenic Highway-Official Scenic Route Signage



Tree and landscape plantings set back from highway.
Reflective of region

Decorative landscape rock/gravel at shoulder transition

In the near term, pilot a demonstration section of the highway—beginning at the library and heading east. Native landscaping and wild flowers may be the place to start, but given Caltrans' right-of-way is so large, this agency should be a first point of contact. This project is a good example of a way to bring local and state partners together to demonstrate the visual impact throughout the corridor. Baker, CA was identified as having created exemplary highway improvements. Fresno County Master Gardeners and Fresno County Extension Service are examples of usually willing partners when it comes to appropriate planting. (See **Figures 8 and 9**.)

**c.** Enhancement of existing commercial properties as noted under *Challenges* is another key step toward civic pride and self-improvement. This can occur as part of a community clean-up and include community volunteers that can help businesses power wash, paint doorways, add color and simple greenery and more. The community can vote on "most improved" business façade and find other ways to recognize business improvements.

# What might deter community progress? What are possible risks to success?

- 1. Limited County resources to offer ongoing support follow-through and communication with community
- 2. Lack of communication within the community and with partners
- 3. Follow-through falls short among community and government leaders
- 4. Lack of understanding of County business development tools and process and clear "next steps" for commercial expansion
- 5. No representative organization to vet issues and map out positive approaches for change
- 6. Lack of resources and support

# Where the community can have an immediate impact

- 1. Support formation of a citizen-led coalition or group.
- 2. Ensure county support of citizen-led group by leveraging resources, staff time, and access to decision-makers in supporting the group's focus and efforts.
- 3. Find resources at the County to begin planning for fire suppression water storage and facilities.
- 4. Obtain community consensus on type of beautification and signage desired for large corridor right-of-way, and engage Supervisor Magsig and Caltrans directly via a citizen-led group or Task Force.
- 5. Convene meetings to address development challenges; identify methods for streamlining and approaches to a community water storage solution.
- Update the CEDS and initiate discussions with Economic Development Administration to evaluate feasibility behind forming a community-led Fire Suppression Facilities District to provide residents and stakeholders blueprint for how to move forward.
- 7. Connect to regional and state agency partners (Cal Fire) that might have programs, technical assistance and other resources to help Squaw Valley/180 move forward on key issues.

## HIGHWAY 180 / SQUAW VALLEY

# **APPENDICES**

- A. LODGING INVENTORY
- **B**. NATIONAL PARKS BASE CAMP COMMUNITIES
- **C.** 11 PRINCIPLES OF PLACEMAKING, PROJECT FOR PUBLIC SPACES
- D. SQUAW VALLEY KEY DEMOGRAPHICS & RETAIL POTENTIAL

# LODGING INVENTORY APPENDIX A

Lodging Inventory – Hwy 180 Vicinity Fresno County

Town	Name	Address	# of Rooms	Rates	Features	Trip Advisor Rating?	Notes
Dunlap	St. Nicholas Ranch and Retreat Center	P.O. Box 400 38526 Dunlap Road, Dunlap, CA Phone: (559) 338-2103 info@stnicholasranch.org	X rooms, X dorms fitting 12 people each, and X RV spaces		Pool, athletic fields and courts, kitchen staff, library, conference and meeting rooms		Ministry of Greek Orthodox Church, runs camps, retreats, etc.
Dunlap	Sierra Inn Hotel	37692 E. Kings Canyon Rd, Dunlap, CA (559) 338-0678		\$102	historic inn,		run via Airbnb
Dunlap	Hilltop Hideaway	36877 Dunlap Rd. Dunlap, CA 93621	1	\$135	fire pit, pool, breakfast		run via Airbnb, guests rave about personal touches
Dunlap	Sequoia RV Park	35671 E Kings Canyon Rd, Dunlap, CA 93621					
Kings Canyon National Park	Cedar Grove Lodge	General's Hwy, Sequoia and Kings Canyon National Park, CA 93633	18 rooms	\$142-\$160			appears outdated compared to area competition
Reedley	The Fairweather Inn	259 South Reed Ave, Reedley, CA (559) 638-1918					no website
Reedley	Reedley Country B&B	43137 Road 52, Reedley, CA (559) 638-2585					no website
Reedley	Edgewater Inn	Manning Ave, Reedley, CA (559) 637-7777 (800) 479-5855	48 rooms	\$75-\$100	Pool, hot tub, breakfast included	3.5	low-rise, budget motel
Sanger	Sequoia View Vineyard & Farm	1384 S. Frankwood Ave, Sanger, CA (559) 787-9412	3 suites	\$150-\$190	Vineyard and compimentary wine tasting, full breakfast, in room spa services	4.5	B&B, intimate setting
Sanger	Wonder Valley Ranch Resort	6450 North Elwood Rd, Sanger, CA (559) 787-2551	68	210-\$250	Meeting and Wedding facilities, Equestrian center, golf course, tennis court, children activities and babysitting, airport transportation, fitness center, restaurant	4.5	Holds outdoor education, summer camps, and large conferences/parties
Sanger	Riverbend RV Park	17604 E Kings Canyon Rd, Sanger, CA 93657	32 sites	\$45- \$50/night; \$275/week	laundry, restrooms/showers, wifi, fishing, basketball, horseshoes	4	
Squaw Valley	Clingans Junction Cabins	35591 E Kings Canyon Rd, Squaw Valley, CA 93675	4 cabins	\$150/night	adjacent coffee shop + bakery	just opened	

Lodging Inventory – Hwy 180 Vicinity Fresno County

Squaw Valley	Squaw Valley Motel	Valley, CA (559) 332-2382	4 single queen rooms and 1 single queen suite (3 additional rooms presently under remodel)	Pool,		Rooms are nothing special, booking website doesn't work
Squaw Valley	The Branded Calf	32324 Indian Guide Rd. Squaw Valley, CA 93675 559-332-2700	4	 ranch setting, acres of property, horses,	4.5	
Squaw Valley	The Starlight Ranch	38528 Willowood Ln, Squaw Valley, CA 93675	campground			

Lodging Inventory – Hwy 180 Vicinity

Tulare County

Town	Name	Address	# of Rooms	Rates	Features	Trip Advisor Rating?	Notes
Badger	Sequoia Resort & RV Park	50616 Hwy 245, Badger, CA 93603	13 sites; various cabins		free bicycle and boat rentals, laundry, beach volleyball, horseshoes, lake recreation area	4.5	
Kings Canyon National Park	Wuksachi Village & Lodge	(888) 252-5757	102 rooms	\$130-\$250	full service restaurant, retail shop, special event facilitis, cocktail lounge, dog friendly	4	The park's signature lodge
Kings Canyon National Park	Bear Paw Camp		6 tent cabins, can sleep up to 4		hike in, meals porivded		Outdoor-type oriented, is a nearly 12 mile hike in and only open June-Sept
Kings Canyon National Park	Montecito Sequoia Lodge	63410 General's Hwy, Sequoia and Kings Canyon National Park, CA 93633 (559) 565-3388 / (800) 843- 8677	50	\$180-\$400	Pool and hot tub, restaurant, breakfast included	4	
Kings Canyon National Park	John Muir Lodge	86728 Highway 180 Kings Canyon National Park, CA 93633 (866) 807-3598	36 rooms	\$175-\$260	large stone fireplace,	4	
Kings Canyon National Park	Grant Grove Cabins	86728 Highway 180 Kings Canyon National Park, CA 93633 (866) 807-3598	50 various cabins	\$60-\$200	timber and tent cabin styles	4	
Lemon Cove	The Plantation	33038 Sierra Highway 198, Lemon Cove, CA (559) 597-2555 (800)240-1466	7 rooms	\$150-\$210	Pool & jacuzzi, orange groves and historic grounds, full breakfast	4	"Gone with the Wind" themed rooms
Sequoia National Park	Stony Creek Lodge	65569 Generals Hwy, Sequoia National Park, CA 93262	11 rooms		restaurant, market/gift shop, gas station	4	located between Sequoia and Kings Canyon parks, easy access for both
Visalia	Ben Maddox House	601 N. Encina St, Visalia, CA (559) 739-0721 (800) 401-9800					Permanently Closed
Woodlake	Wicky-Up Ranch	22702 Ave 344, Woodlake, CA (559) 564-8898	4	\$185-\$241	working orange ranch, in-room massage service, breakfast	5	beautiful architecture and turn of the century details

# NATIONAL PARKS BASE CAMP COMMUNITIES

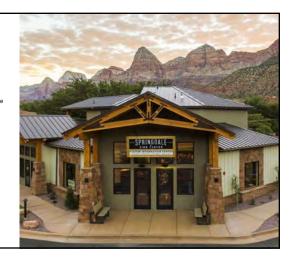
APPENDIX B

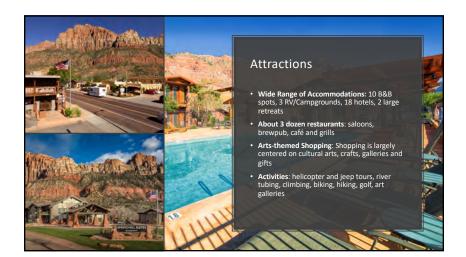
## Fresno – Hwy 180 E Project

Case Studies of Basecamp-type Communities outside National Parks

# Springdale - Zion

- 500 permanent residents, draws a couple million visitors annually (Zion Park drew 4.5M visitors in 2017)
- Community adopted arch standards
- Tourism center
- Picturesque O.C. Tanner Amphitheatre brings concerts and shows
- Park and ride and shuttle: free shuttle, two loops (one for town and one for the park), private vehicles may not drive in Canyon area while shuttles are running
- St. George Area Convention and Visitors Bureau (435-634-5747) & Zion Canyon Visitors Bureau (1-435-772-3256)



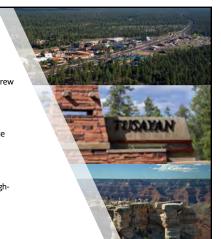






#### Tusayan – Grand Canyon

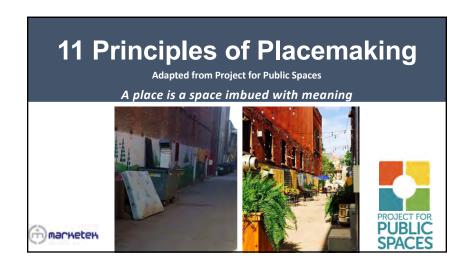
- 600 permanent residents, Grand Canyon Park drew 6.2M visitors in 2017
- Free shuttle bus
- National Geographic IMAX Theater
- Grand Canyon South Rim Chamber of Commerce (844-638-2901) and Grand Canyon Chamber Visitors Center (928-638-2901)
- Town is still largely under development, plans include expanded trail system, park with fields, public art program, winter park, dude ranch, highend boutiques, among other things





# 11 PRINCIPLES OF PLACEMAKING

APPENDIX C



## 11 Principles of Placemaking

1) The community is the expert. The people living and working in a place are the folks who know what needs to be done and how best to do it.



### 11 Principles of Placemaking



2) You are creating a place, not a design. The blueprints for a neighborhood improvement effort are much less critical to its success than other factors, such as a management plan and the involvement of local citizens.

## 11 Principles of Placemaking

3) You can't do it alone. Finding the right partners will bring more resources, innovative ideas, and new sources of energy for your efforts.



### 11 Principles of Placemaking



4) They'll always say, "It can't be done." When government officials, business people and even some of your own neighbors say it won't work, what they really mean is "We've never done it like this before." It's a sign you're on the right track.

### 11 Principles of Placemaking

5) You can see a lot by just observing. The smartest way to turn a neighborhood around is to first take a close look at what goes on there, watching out for what works and what doesn't in that particular place.



#### 11 Principles of Placemaking



**6) Develop a vision.** For a community vision to make sense and to make a difference, it needs to come from the people who live there, not from consultants or other outside professionals.

# 11 Principles of Placemaking

7) Form supports function. If you don't take into account how people use a particular place in the beginning, you will have to deal with the consequences later.



### 11 Principles of Placemaking



**8) Make the connections**. A great place in a neighborhood offers many things to do, all of which enhance each other and add up to more than the sum of the parts.

## 11 Principles of Placemaking

**9) Start with petunias.** Little things can set the stage for big changes, especially by proving to local skeptics that change is indeed possible.



#### 11 Principles of Placemaking



**10) Money is not the issue.** If you have a spirited community working with you, you'll find creative ways around financial obstacles.

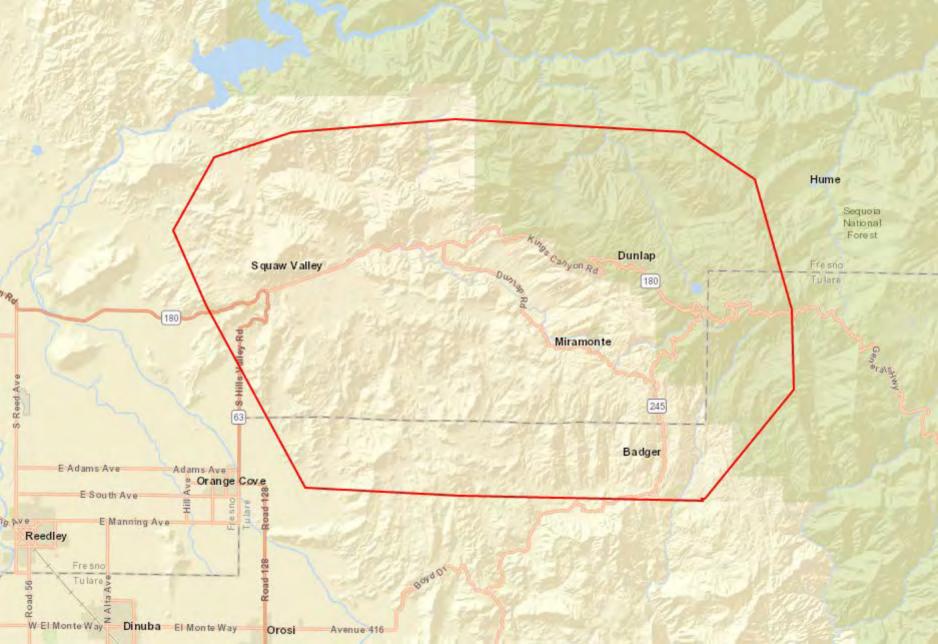
## 11 Principles of Placemaking

11) You are never finished. Eighty percent of the success of any good place is due to how well it is managed after the project is done.



# KEY DEMOGRAPHICS & RETAIL POTENTIAL

APPENDIX D





#### Demographic and Income Profile

Squaw Valley Study Area Prepared by Esri
Area: 283.52 square miles

Summary	Census 2010	2018	2023
Population	5,723	5,766	5,870
Households	2,195	2,212	2,249
Families	1,570	1,578	1,603
Average Household Size	2.57	2.57	2.58
Owner Occupied Housing Units	1,736	1,728	1,806
Renter Occupied Housing Units	459	485	444
Median Age	45.6	47.3	48.2
Trends: 2018 - 2023 Annual Rate	Area	State	National
Population	0.36%	0.82%	0.83%
Households	0.33%	0.76%	0.79%
Families	0.31%	0.76%	0.71%
Owner HHs	0.89%	1.73%	1.16%
Median Household Income	2.90%	3.25%	2.50%

		2018	2	2023
Households by Income	Number	Percent	Number	Percent
<\$15,000	354	16.0%	292	13.0%
\$15,000 - \$24,999	229	10.4%	185	8.2%
\$25,000 - \$34,999	198	9.0%	171	7.6%
\$35,000 - \$49,999	236	10.7%	225	10.0%
\$50,000 - \$74,999	465	21.0%	450	20.0%
\$75,000 - \$99,999	282	12.7%	325	14.5%
\$100,000 - \$149,999	300	13.6%	383	17.0%
\$150,000 - \$199,999	129	5.8%	186	8.3%
\$200,000+	19	0.9%	32	1.4%

Median Household Income	\$53,287	\$61,477
Average Household Income	\$64,086	\$76,296
Per Capita Income	\$24,820	\$29,363

	Census 2	010	20	18	20	23
Population by Age	Number	Percent	Number	Percent	Number	Percent
0 - 4	304	5.3%	292	5.1%	288	4.9%
5 - 9	319	5.6%	304	5.3%	310	5.3%
10 - 14	382	6.7%	325	5.6%	338	5.8%
15 - 19	373	6.5%	310	5.4%	324	5.5%
20 - 24	252	4.4%	289	5.0%	237	4.0%
25 - 34	537	9.4%	628	10.9%	609	10.4%
35 - 44	638	11.1%	584	10.1%	633	10.8%
45 - 54	941	16.4%	731	12.7%	660	11.2%
55 - 64	1,025	17.9%	989	17.2%	913	15.6%
65 - 74	593	10.4%	873	15.1%	965	16.4%
75 - 84	279	4.9%	343	5.9%	482	8.2%
85+	80	1.4%	98	1.7%	112	1.9%
	Census 2	010	20	18	20	23

0JT	00	1.470	90	1.7 70	112	1.570
	Census 20	10	20	18	20	23
Race and Ethnicity	Number	Percent	Number	Percent	Number	Percent
White Alone	4,834	84.5%	4,708	81.7%	4,690	79.9%
Black Alone	66	1.2%	72	1.2%	76	1.3%
American Indian Alone	146	2.6%	150	2.6%	155	2.6%
Asian Alone	80	1.4%	92	1.6%	103	1.8%
Pacific Islander Alone	6	0.1%	8	0.1%	9	0.2%
Some Other Race Alone	347	6.1%	441	7.6%	505	8.6%
Two or More Races	243	4.2%	295	5.1%	331	5.6%
Hispanic Origin (Any Race)	976	17.1%	1,220	21.2%	1,430	24.4%

Data Note: Income is expressed in current dollars.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023.

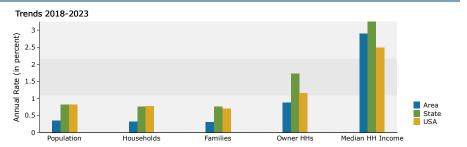
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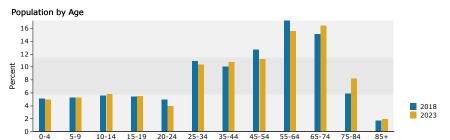
2019 Esri Page 1 of 2

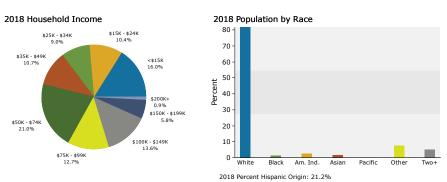


#### Demographic and Income Profile

Squaw Valley Study Area Area: 283.52 square miles Prepared by Esri







Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023.

February 05, 2019

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22019 Esri



Data for all businesses in area

#### **Business Summary**

Squaw Valley Study Area Area: 283.52 square miles Prepared by Esri

Total Businesses:		129		
Total Employees:		1,277	,	
Total Residential Population:		5,766		
		22		
Employee/Residential Population Ratio (per 100 Residents)	P. ein.		Emanda	
by SIC Codes	Busine	esses Percent	Emplo Number	
Agriculture & Mining	11	8.5%	58	4.5%
Construction	16	12.4%	48	3.8%
Manufacturing	6	4.7%	16	1.3%
Transportation	6	4.7%	17	1.3%
Communication	0	0.0%	0	0.0%
Utility	1	0.8%	12	0.9%
,	2	1.6%	9	0.7%
Wholesale Trade	2	1.070	9	0.770
Retail Trade Summary	19	14.7%	81	6.3%
Home Improvement	3	2.3%	13	1.0%
General Merchandise Stores	0	0.0%	0	0.0%
Food Stores	4	3.1%	30	2.3%
Auto Dealers, Gas Stations, Auto Aftermarket	1	0.8%	2	0.2%
Apparel & Accessory Stores	0	0.0%	0	0.0%
Furniture & Home Furnishings	1	0.8%	1	0.1%
Eating & Drinking Places	4	3.1%	21	1.6%
Miscellaneous Retail	6	4.7%	14	1.1%
Finance, Insurance, Real Estate Summary	4	3.1%	10	0.8%
Banks, Savings & Lending Institutions	0	0.0%	0	0.0%
Securities Brokers	0	0.0%	0	0.0%
Insurance Carriers & Agents	0	0.0%	0	0.0%
Real Estate, Holding, Other Investment Offices	4	3.1%	10	0.8%
Services Summary	47	36.4%	680	53.2%
Hotels & Lodging	9	7.0%	215	16.8%
Automotive Services	2	1.6%	6	0.5%
Motion Pictures & Amusements	2	1.6%	41	3.2%
Health Services	1	0.8%	3	0.2%
Legal Services	0	0.0%	0	0.0%
Education Institutions & Libraries	5	3.9%	89	7.0%
Other Services	30	23.3%	326	25.5%
		10.00/	246	27.40
Government	14	10.9%	346	27.1%
Unclassified Establishments	3	2.3%	0	0.0%
Totals	129	100.0%	1,277	100.0%
Source: Convigint 2018 Infogroup, Inc. All rights reserved. Esti Total Residential Population forecasts for 2018.				

Source: Copyright 2018 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2018.

Date Note: Data on the Business Summary report is calculated using Esri's Data allocation method which uses census block groups to allocate business summary data to custom areas.

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#### **Business Summary**

Squaw Valley Study Area Area: 283.52 square miles Prepared by Esri

	Busine	esses	Employees	
by NAICS Codes	Number		Number	_
Agriculture, Forestry, Fishing & Hunting	7	5.4%	52	4.1%
Mining	0	0.0%	0	0.0%
Utilities	1	0.8%	12	0.9%
Construction	16	12.4%	48	3.8%
Manufacturing	4	3.1%	15	1.2%
Wholesale Trade	2	1.6%	9	0.7%
Retail Trade	14	10.9%	60	4.7%
Motor Vehicle & Parts Dealers	1	0.8%	1	0.1%
Furniture & Home Furnishings Stores	0	0.0%	0	0.0%
Electronics & Appliance Stores	1	0.8%	1	0.1%
Bldg Material & Garden Equipment & Supplies Dealers	3	2.3%	13	1.0%
Food & Beverage Stores	4	3.1%	30	2.3%
Health & Personal Care Stores	0	0.0%	0	0.0%
Gasoline Stations	1	0.8%	1	0.1%
Clothing & Clothing Accessories Stores	1	0.8%	1	0.1%
Sport Goods, Hobby, Book, & Music Stores	0	0.0%	0	0.0%
General Merchandise Stores	0	0.0%	0	0.0%
Miscellaneous Store Retailers	3	2.3%	6	0.5%
Nonstore Retailers	2	1.6%	8	0.6%
Transportation & Warehousing	7	5.4%	18	1.4%
Information	3	2.3%	6	0.5%
Finance & Insurance	0	0.0%	0	0.0%
Central Bank/Credit Intermediation & Related Activities	0	0.0%	0	0.0%
Securities, Commodity Contracts & Other Financial	0	0.0%	0	0.0%
Insurance Carriers & Related Activities; Funds, Trusts &	0	0.0%	0	0.0%
Real Estate, Rental & Leasing	4	3.1%	10	0.8%
Professional, Scientific & Tech Services	10	7.8%	22	1.7%
Legal Services	0	0.0%	0	0.0%
Management of Companies & Enterprises	0	0.0%	0	0.0%
Administrative & Support & Waste Management & Remediation	6	4.7%	17	1.3%
Educational Services	4	3.1%	87	6.8%
Health Care & Social Assistance	1	0.8%	3	0.2%
Arts, Entertainment & Recreation	2	1.6%	44	3.4%
Accommodation & Food Services	13	10.1%	235	18.4%
Accommodation	9	7.0%	215	16.8%
Food Services & Drinking Places	4	3.1%	21	1.6%
Other Services (except Public Administration)	17	13.2%	294	23.0%
Automotive Repair & Maintenance	1	0.8%	1	0.1%
Public Administration	14	10.9%	346	27.1%
Unclassified Establishments	3	2.3%	0	0.0%
Total	129	100.0%	1,277	100.0%
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**Source:** Copyright 2018 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2018. **Date Note:** Data on the Business Summary report is calculated using **Esri's Data allocation method** which uses census block groups to allocate business summary data to custom areas.

February 05, 2019

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#### Retail MarketPlace Profile

Squaw Valley Study Area Prepared by Esri Area: 283.52 square miles

Summary Demographics						
2018 Population						5,76
2018 Households						2,21
2018 Median Disposable Income						\$43,78
2018 Per Capita Income						\$24,82
	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus	Number of
2017 Industry Summary		(Retail Potential)	(Retail Sales)		Factor	Businesse:
Total Retail Trade and Food & Drink	44-45,722	\$69,974,928	\$13,353,109	\$56,621,819	68.0	1
Total Retail Trade	44-45	\$63,942,852	\$12,761,999	\$51,180,853	66.7	1
Total Food & Drink	722	\$6,032,076	\$591,110	\$5,440,966	82.2	
	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus	Number o
2017 Industry Group		(Retail Potential)	(Retail Sales)		Factor	Businesse
Motor Vehicle & Parts Dealers	441	\$14,453,271	\$160,428	\$14,292,843	97.8	
Automobile Dealers	4411	\$11,474,043	\$0	\$11,474,043	100.0	
Other Motor Vehicle Dealers	4412	\$1,842,937	\$0	\$1,842,937	100.0	
Auto Parts, Accessories & Tire Stores	4413	\$1,136,291	\$160,428	\$975,863	75.3	
Furniture & Home Furnishings Stores	442	\$2,112,787	\$0	\$2,112,787	100.0	
Furniture Stores	4421	\$1,071,269	\$0	\$1,071,269	100.0	
Home Furnishings Stores	4422	\$1,041,518	\$0	\$1,041,518	100.0	
Electronics & Appliance Stores	443	\$2,135,301	\$138,792	\$1,996,509	87.8	
Bldg Materials, Garden Equip. & Supply Stores	444	\$4,398,434	\$1,881,604	\$2,516,830	40.1	
Bldg Material & Supplies Dealers	4441	\$4,053,524	\$1,065,249	\$2,988,275	58.4	
Lawn & Garden Equip & Supply Stores	4442	\$344,910	\$816,355	-\$471,445	-40.6	
Food & Beverage Stores	445	\$10,042,718	\$3,895,614	\$6,147,104	44.1	
Grocery Stores	4451	\$8,615,027	\$2,744,919	\$5,870,108	51.7	
Specialty Food Stores	4452	\$706,447	\$1,150,695	-\$444,248	-23.9	
Beer, Wine & Liquor Stores	4453	\$721,245	\$0	\$721,245	100.0	
Health & Personal Care Stores	446,4461	\$4,659,371	\$0	\$4,659,371	100.0	
Gasoline Stations	447,4471	\$5,910,009	\$908,458	\$5,001,551	73.4	
Clothing & Clothing Accessories Stores	448	\$3,826,975	\$141,388	\$3,685,587	92.9	
Clothing Stores	4481	\$2,773,816	\$0	\$2,773,816	100.0	
Shoe Stores	4482	\$480,772	\$0	\$480,772	100.0	
Jewelry, Luggage & Leather Goods Stores	4483	\$572,387	\$141,388	\$430,999	60.4	
Sporting Goods, Hobby, Book & Music Stores	451	\$1,808,250	\$0	\$1,808,250	100.0	
Sporting Goods/Hobby/Musical Instr Stores	4511	\$1,576,641	\$0	\$1,576,641	100.0	
Book, Periodical & Music Stores	4512	\$231,609	\$0	\$231,609	100.0	
General Merchandise Stores	452	\$10,171,640	\$0	\$10,171,640	100.0	
Department Stores Excluding Leased Depts.	4521	\$5,857,027	\$0	\$5,857,027	100.0	
Other General Merchandise Stores	4529	\$4,314,613	\$0	\$4,314,613	100.0	
Miscellaneous Store Retailers	453	\$2,593,689	\$581,439	\$2,012,250	63.4	
Florists	4531	\$112,609	\$301,439	\$112,609	100.0	
Office Supplies, Stationery & Gift Stores	4531	\$112,609	\$99,422	\$395,304	66.5	
Used Merchandise Stores	4532	\$494,726	\$122,159	\$393,304	28.5	
Other Miscellaneous Store Retailers	4539	\$1,766,574	\$359,858	\$1,406,716	66.2	
Nonstore Retailers	4539 454	\$1,766,574	\$359,858	-\$3,174,029	-46.4	
	4541		\$2,717,193	-\$3,174,029 -\$1,250,751	-46.4	
Electronic Shopping & Mail-Order Houses	4541 4542	\$1,466,442 \$27,574	\$2,/1/,193	-\$1,250,751 \$27,574	100.0	
Vending Machine Operators						
Direct Selling Establishments	4543 722	\$336,391	\$2,287,242	-\$1,950,851	- <b>74.4</b> 82.2	
Food Services & Drinking Places		\$6,032,076	\$591,110	\$5,440,966		
Special Food Services	7223	\$127,715	\$0	\$127,715	100.0	
Drinking Places - Alcoholic Beverages Restaurants/Other Eating Places	7224 7225	\$118,469 \$5,785,892	\$27,211	\$91,258	62.6 82.2	
Restaurants/Other Eating Places	/225	\$5,785,892	\$563,898	\$5,221,994	82.2	

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf

Source: Esri and Infogroup. Esri 2018 Updated Demographics. Esri 2017 Retail MarketPlace. Copyright 2018 Esri. Copyright 2017 Infogroup, Inc. All rights reserved.

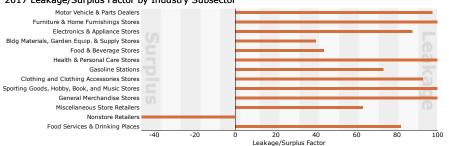
February 05, 2019



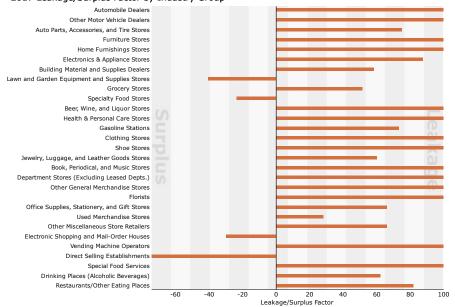


Squaw Valley Study Area Area: 283.52 square miles Prepared by Esri

#### 2017 Leakage/Surplus Factor by Industry Subsector



#### 2017 Leakage/Surplus Factor by Industry Group



Source: Esri and Infogroup. Esri 2018 Updated Demographics. Esri 2017 Retail MarketPlace. Copyright 2018 Esri. Copyright 2017 Infogroup, Inc. All rights reserved.

February 05, 2019

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# POTENTIAL FUNDING SOURCES FOR INFRASTRUCTURE TO SERVE CATALYST SITES IN FRESNO COUNTY

Prepared for:

**Fresno Economic Development Corporation** 

Prepared by:

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July 30, 2019

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# **Funding and Financing Sources and Mechanisms**

Developing properties in rural areas or intensely developed areas often requires new "backbone" infrastructure to support new development. Because backbone or "off-site" infrastructure improvements typically serve multiple properties, the improvements are commonly funded through an assemblage of sources, including development impact fees, other local sources, private sources, and state and federal funds. The following report provides a description of potential funding sources that may be appropriate to fund public infrastructure that is needed to support new development in Fresno County. Given the subject jurisdictions' interest in potentially using tax increment financing, such as an Enhanced Infrastructure Financing District, as a source of funding, this report also provides an order of magnitude estimate of the amount of debt, such as a loan from the California Infrastructure Bank, that could be supported by an EIFD formed surrounding 18 target sites within Fresno County.

Although the terms "funding" and "financing" are often used interchangeably, there is an important distinction between the two terms. "Funding" typically refers to a revenue source such as a tax, fee, or grant that is used to pay for an improvement. Some funding sources, such as impact fees, are one-time payments, while others, such as assessments, are ongoing payments. "Financing" involves borrowing against future revenues by issuing

bonds or other debt instruments that are paid back over time through taxes or fee payments, enabling agencies to pay for infrastructure before the revenue to cover the full cost of the infrastructure is available.

The funding sources and financing tools have been evaluated relative to their purpose, process of adoption and implementation. Funding and financing mechanisms are organized under four broad categories:

- 1. Developer, property owner, and user funding, financing and resources;
- 2. Existing City / County resources;
- 3. Tax increment financing; and
- 4. Federal and State funds.

As Table 1 illustrates, the categories differ in terms of the scope and scale of their targeted improvements.

**Table 1. Funding Mechanism Overview** 

Funding Mechanism	Target Improvements	Target Scale
Developer, Property Owner and User Funding, Financing a	nd Incentives	
Development Impact Fees	- Off-Site Infrastructure/Public Facilities	SP/Citywide
Special Assessment Districts	- Infrastructure/Public Facilities	SP
	- Certain Maintenance/Services	
Community Facilities Districts (CFDs)	- Infrastructure/Public Facilities	Project/SP/Citywide
	- Certain Maintenance/Services	
Development Agreements and Enhanced Entitlements	- Infrastructure/Public Facilities	Project/SP/Citywide
Incentive Agreements	- In-Tract Improvements	Project
	- Vertical Improvements	
	- Direct Business Assistance	
CEQA Mitigations	- Off-Site Infrastructure/Public Facilities	Project/SP
Development Standards	- On-site infrastructure	SP
Existing City Resources		
City Capital Improvement Program (CIP)	- All off-site improvements	Citywide
General Fund	- All off-site improvements	Citywide
Tax Increment Financing		
Enhanced Infrastructure Financing Districts	- Infrastructure/Public Facilities	SP/Citywide
	- In-Tract Improvements	
	- Brownfields Remediation	
	- Some Vertical Improvements	
Community Revitalization and Investment Authorities	- EIFD improvements + financial subsidies for	SP/Citywide
	private development + affordable housing	
Federal/ State Programs		
Community Development Block Grants	- Infrastructure	Project/SP/Citywide
	- Business assistance for makers and artists	

Funding Mechanism	Target Improvements	Target Scale
Investment Incentives	- In-Tract Improvements	Project
	- Brownfields Remediation	
	- Vertical Improvements	
	- Property Acquisition/Transfer	
	- Direct Business Assistance	
Grant/ Loan Programs	- Off-Site Infrastructure	Varies
-	- In-Tract Improvements	
	- Brownfields Remediation	
	- Vertical Improvements	
	- Property Acquisition/Transfer	
	- Direct Business Assistance	

# I. Developer, Property Owner and User Funding, Financing and Incentives

Developers are primarily responsible for building on-site improvements necessary to complete their projects. In contrast, the path to delivery of infrastructure that serves a broader area requires greater coordination among public and private stakeholders. The mechanisms reviewed below offer ways of engaging developers in the funding and financing of off-site improvements necessary for accommodating new development and spurring further economic growth. A final tool, incentive agreements, provides a vehicle for local agencies to fund a portion of in-tract costs in cases where private development would not otherwise be feasible.

#### **Development Impact Fees**

Pursuant to the Mitigation Fee Act,<sup>1</sup> local agencies may assess impact fees to cover incremental service and capital costs of new development. Fees are typically paid at the time of building permit issuance or recording the final subdivision map and are placed into a reserve fund for specific improvements. Parking or traffic mitigation fees are examples of development impact fees. A technical analysis is required to demonstrate the proportional relationship between the fee and the incremental costs to the agency, prior to adoption by the legislative body. Local agencies

may also consider market factors when setting fees, in particular, whether fee levels stand to impact development feasibility.

Impact fees provide an important revenue source for funding local infrastructure. The challenge is sequencing current fee revenues with infrastructure investments necessary to serve near- and long-term growth. Several tools address this challenge by encouraging private investment in area-serving infrastructure, discussed below.

#### **Special Assessment and Special Tax Districts**

The intent of special assessment and special tax districts is to fund public capital facilities to serve new development. Districts adopt a new special assessment or special tax paid by property owners within a defined area, which can be used to issue debt for capital improvements that benefit the district. Pursuant to Proposition 218, special assessments must be assigned to property owners in direct proportion to the benefits received from targeted improvements. Special tax formulas are not subject to the same standard and allow for a variety of property characteristics – other than property value – to determine tax apportionment. Both special assessments and special taxes are subject to approval by voters (if 12 or more are registered in the district) or affected property owners (in all other cases). A simple majority is required for special assessments, whereas special taxes must be approved by a two-thirds majority.

<sup>&</sup>lt;sup>1</sup> Government Code §66000

The scope of eligible activities in special tax districts is broader than in special assessment districts. While facilities or services funded by special assessment districts must confer "special benefits" upon affected property owners, special tax districts must only ensure that new capital facilities and services supplement, rather than supplant, existing levels of service in the district. Due to their greater flexibility, special tax districts are more commonly utilized than special assessment districts.

Special tax districts are typically authorized under the Mello-Roos Communities Facilities Act of 1982<sup>2</sup> and are referred to as Community Facilities Districts (CFDs). A variety of special assessment districts are authorized under state law, including the Municipal Improvement Act of 1913, Landscape and Lighting Act of 1972, and Benefit Assessment Act of 1982. A comparison of the two structures follows.

#### Mello Roos/Community Facilities Districts (CFDs)

Process: The process to establish a CFD may be initiated by two members of the sponsoring legislative body, 10 percent of district voters, or 10 percent of landholders (measured by acreage owned). Proposed districts may include noncontiguous areas. Adoption of the special tax requires a public hearing and an affirmative vote by two-thirds of the qualifying electorate. If there are twelve or more registered voters within the proposed geographic area of the district, then the formation election is an election of registered voters. If there are less than 12 registered voters, then the formation election is an election of property owners, with each owner receiving one vote per acre of owned property. The same approval requirements apply to the issuance of bonds. Bonds are limited to a 40-year maturity and are secured by special tax payments. CFD taxes are paid concurrently with ad valorem property taxes. Throughout the life of the district, an annual report must be produced upon request of property owners.

- Use of Funds: CFDs are eligible to fund the planning, design, construction, rehabilitation or acquisition of a broad range of public facilities. Examples of eligible improvements include:
  - Streets and public right of way improvements;
  - Park, recreation, and open-space facilities;
  - School sites and structures;
  - Libraries, childcare facilities;
  - Water, wastewater and utility infrastructure;
  - Stormwater management;
  - Flood infrastructure; and
  - Seismic retrofitting.

In addition, districts may fund certain public services provided that services are not funded with bond proceeds and services do not supplant those offered prior to the formation of the district.

<sup>&</sup>lt;sup>2</sup> Government Code §53311

Examples of eligible services include fire and police protection and the maintenance of new infrastructure or parks.

Evaluation: CFDs have proven effective at funding broad-based capital projects in developing areas. They are most commonly used in circumstances in which approval is limited to a small group of land holders. The special tax creates a dedicated funding source suitable for bond financing but also an additional cost on property ownership.

#### **Special Assessment Districts**

- Process: Special assessments districts require the preparation of an engineer's report that demonstrates that planned improvements will confer a "special benefit" upon the district. The report must also allocate the costs of proposed improvements in proportion to benefits received from services and improvements. Affected property owners vote on the assessment, with voting weighted proportionally to each property owner's proposed assessment. A simple majority is required for the assessment to take effect. Once established, the sponsoring public agency may issue bonds secured against assessment revenue, pursuant to the Improvement Bond Act of 1915.3
- Uses of Funds: The many variants of special assessment districts under state law authorize the construction of

- public facilities such as landscaping, lighting, streets, water, wastewater and storm water infrastructure, parks and public facilities. Most assessment districts also allow funding of maintenance costs associated with public facilities. However, assessment bonds are not authorized to pay for ongoing services.
- Evaluation: Special assessments are appropriate for funding maintenance and infrastructure when benefits can be clearly measured and apportioned among landholders. The revenue capacity of special assessment districts is relatively limited given that assessments may only account for benefits conferred on specific property owners that go beyond standard levels of service.

#### **Developer Credits and Reimbursements**

Many local agencies permit developers to construct area-serving infrastructure such as streets, utilities, parks and open space in lieu of paying certain impact fees. Local agencies may also enter into agreements to reimburse developers for investments in areaserving infrastructure in cases where the value of the investment exceeds fees otherwise owed by the project. Local agencies may pledge future development-based revenues, such as impact fees, assessments or special taxes towards the reimbursement agreement; however, pursuant to Government Code §53190, the general fund must not be liable for repayment of obligations. All

<sup>&</sup>lt;sup>3</sup> Streets & Highways Code §8500

special levies and assessments are subject to approval by property owners and voters, as described in the previous section.

# **Development Agreements and Enhanced Entitlements**

It is common for local agencies to enter into a development agreement when conferring long-term entitlements for a major project. As part of the negotiation process, developers may offer to provide extraordinary benefits, including infrastructure and other public facilities. These commitments are agreed upon at the discretion of negotiating parties and as such are not subject to the Mitigation Fee Act. The nature and magnitude of benefits provided will depend on local market conditions, the entitlements, and the development economics of the project. Providing favorable entitlements can be an effective means for funding infrastructure and public facilities. Examples include: reducing parking requirements, increasing permitted floor to area ratios, etc. By increasing the value of the private development, additional "value" is created for infrastructure improvements.

### **Economic Incentive Agreements**

Incentive agreements provide the private sector a form of gap funding in situations where the development economics do not support the full cost of a commercial project with the potential to deliver substantial community benefits. Local agencies may enter into incentive agreements pledging to rebate a portion of sales

taxes generated by new businesses locating to an area that designate the jurisdiction as the point of sale. Incentive agreements may also track and rebate a portion of Transient Occupancy tax revenues generated by the suppliers, customers, and employees of new businesses. Developers or tenants can leverage such agreements to finance site or tenant improvements in private capital markets secured by anticipated tax rebates. Pursuant to Section 53083 of the California Government Code, jurisdictions providing economic development subsidies must specify in a public hearing the amount of the subsidy and the projected benefits prior to entering into an incentive agreement valued above \$100,000.

#### **CEQA Mitigations**

As a requirement of approval, developers may be required to undertake a number of mitigation measures, such as off-site traffic mitigation as defined by the California Environmental Quality Act (CEQA).

#### **User and Enterprise Fees**

User fees could be a potential source of funding for water, wastewater, and stormwater improvements.

# **II. Existing City Resources**

#### **General Fund**

While not a primary funding source, a city's or county's General Fund may be a useful source for short-term loans to be repaid by longer-term sources of capital.

#### **Capital Improvement Program (CIP)**

Infrastructure projects may be candidates for inclusion in a local jurisdiction's Capital Improvement Program.

## III. Tax Increment Financing

Tax increment financing permits local agencies to finance infrastructure and other community improvements by issuing bonds secured by growth in an area's property tax revenues. Tax increment financing was approved by California voters in 1952 and later became a widely used tool of redevelopment agencies. Following the dissolution of Redevelopment in 2012, the State has bolstered alternative means of tax increment finance, through the approval of legislation that permits the creation of "Enhanced Infrastructure Finance Districts" (EIFDs), and Community Revitalization and Investment Authorities (CRIAs).

While not as robust as Redevelopment, an EIFD or CRIA can serve as an important funding source for public facilities as well as other eligible projects. Once established, infrastructure finance districts and CRIAs are authorized to receive tax increment revenues from a defined area with the consent of affected taxing entities, excluding school districts. The financing capacity of the districts is driven by the portion of the base 1% tax levy that is dedicated to the district. It is an effective tool when either a sponsoring city receives a large share of the 1% property tax levy or if counties agree to contribute a portion of the county increment to the district. San Francisco has used these tools because, as both a county and a city, it receives approximately 65% of the base 1% property tax levy. The City of West Sacramento also receives a large share of the base 1% levy and has adopted an EIFD that covers much of the City. Other city tax

revenues can be deposited into an EIFD, including property taxes in-lieu of motor vehicle license fees, Redevelopment Property Tax Transfer Funds (RPTTF), assessment district revenues, etc.

The primary objective of infrastructure finance districts is to finance capital projects of "communitywide impact" Districts may include any area, including non-contiguous areas, within a sponsoring city or county.

#### **Enhanced Infrastructure Finance Districts (EIFDs)**

 Process: Enhanced Infrastructure Finance District (EIFD)<sup>4</sup> is a recent variant of the base IFD legislation. Cities and counties with a redevelopment successor agency must receive a finding of completion from the Department of Finance (DOF) prior to forming an EIFD.

EIFDs are governed by a separate entity known as the Public Finance Authority. Members of the Public Finance Authority are chosen by the sponsoring agency and are to include three members of the legislative body as well as two members of the public. The governing entity oversees the preparation of the infrastructure finance plan, which must specify the boundaries of the district, the projects to be financed, tax revenues to be captured over time, a plan for debt financing, a fiscal analysis, and the district term. An EIFD may extend 45

years from approval of bond issuance. To form an EIFD, there must be a public hearing and a vote of the governing body. EIFDs require the support of 55% of voters or landowners in order to issue bonded indebtedness.

*Use of Funds:* At a minimum, infrastructure finance districts are eligible to fund public facilities of "communitywide significance" that are necessary to accommodate new development. A broad spectrum of improvements are eligible, including: transportation infrastructure, water and wastewater infrastructure, solid waste facilities, and community amenities including parks, libraries, and childcare centers. All structures also authorized funding of affordable housing costs associated with a Transit Priority Project, pursuant to Government Code §65470.6 The scope of EIFDs extends to other forms of private development assistance, including brownfield restoration, Sustainable Communities Strategy projects, industrial structures for private use and affordable housing. While not required to build housing, infrastructure finance districts must replace any affordable units destroyed or removed in the course of the district's activities.

<sup>&</sup>lt;sup>4</sup> Government Code §53398.5

<sup>&</sup>lt;sup>5</sup> Additional legislative appointees may be added in cases where multiple taxing entities sponsor the district.

<sup>&</sup>lt;sup>6</sup> A Transit Priority Project must be located within a half mile of a major transit stop, contain at least 50 percent residential uses, and reserve at least 20 percent of units for families with moderate incomes or less.

# **EIFD Funding Potential Supported by 18 Target Catalyst Sites**

KMA has undertaken an order of magnitude analysis of the amount of property tax increment that could potentially be generated by the development of 18 target sites within 9 communities and the size of a loan that the tax increment could potentially support. The analysis is based on the development opportunities that DSG advisors has identified for each of the sites and is detailed in Appendix A to this report. The sites and their opportunities are summarized as follows:

Table 2. Order of Magnitude EIFD of EIFD Revenues and Supported Net Loan Proceeds

Community and Catalyst sites	Anticipated Development Potential	Estimated Assessed Value	Estimated Annual City and County Property and VLF Revenue from New Development that could be deposited into EIFD	Estimated Loan Proceeds Supported by EIFD
Reedley – South Industrial Site and Manning Bridge Area – 163 acres	625,000 sf of industrial, 14,000 sf of hotel and 83,000 sf of office	\$142 million	\$790,000	\$11 million
Selma – North Selma and Selma Crossing – 99 acres	515,000 sf of industrial, 70,000 sf of hotel and 20,000 sf of office	\$75 million	\$420,000	\$6 million
Kingsburg - Selma Swap Meet and Hotel Site – 46 acres	225,000 sf of industrial, 15,000 sf of office and 70,000 sf of hotel	\$36 million	\$150,000	\$2 million
Sanger – Hwy 180 Commercial and "N" Ave. site – 89 acres	220,000 sf of industrial, 140,000 sf of hotel, 219,000 sf of office	\$111 million	\$700,000	\$10 million
Mendota – Covanta Energy and W. Panoche Rd. – 315 acres	1.5 million square feet of industrial	\$229 million	\$1.3 million	\$18 million
Kerman – Historic sites and South Industrial – 44 acres	210,000 sf of industrial and 5,000 sf of office	\$30 million	\$150,000	\$2 million
Fowler SOI – golden State Blvd. and Hwy 99 – 137 acres	710,000 sf of industrial	\$86 million	\$630,000	\$9 million
Firebaugh – Hwy 33 Rail Site and Bullard Ave. site – 209 acres	1 million sf of industrial	\$154 million	\$760,000	\$10 million
San Joaquin – OPC Railroad Street and Cherry Lane – 89 acres	400,000 sf of industrial	\$67 million	\$380,000	\$5 million

This table shows that the revenue-generating capacity of an EIFD varies significantly from property to property. The key factors include: the size of the district, the amount and value of new development, and the portion of property tax increment that the cities and county receive. In some cases it may be an effective

tool to pursue while in other cases the yield is too small relative to the effort to form and administer the fund.

# **Community Revitalization and Investment Authorities**

Community Revitalization and Investment Authorities (CRIAs) are another variant of the base IFD legislation. They are similar in many ways to EIFDs but with several important distinctions.

Process: CRIAs are governed by a separate entity, either a Community Revitalization and Investment Authority or a Joint Powers Authority CRIA. While voter approval is not required to form a CRIA, the formation does require three public hearings and an election is required if 25% to 50% of property owners and residents file a protest by the third public hearing. If more than 50% of property owners file a protest, then the formation process ceases.

In order for an area to be qualified for formation of a CRIA, the area must be either: a) a Disadvantaged Community; or b) a former military base; or c) 80% of the property must have a Median Household Income that is less than 80% of the State, County or Citywide household income and meet three of the following four conditions:

- Unemployment rate that is 3% higher than the Statewide average;
- Crime rate that is 5% higher than the Statewide average;
- Deteriorated or inadequate infrastructure;
- o Deteriorated commercial or residential structures.

The formation of a CRIA requires the preparation of a comprehensive Plan that must contain the following:

- o Statement of goals and objectives of the plan;
- Description of deteriorated/ inadequate infrastructure and construction program;
- Affordable housing program;
- o Program to remedy hazardous materials;
- Program to provide funding to facilitate economic revitalization;
- Fiscal analysis over 5-year horizon, including bonding;
- Provisions for tax increment financing, if CRIA so elects
- Time limits 30 years to establish debt; 45 years to receive increment;
- Two-year replacement housing requirement;
- Prohibition on reduction of total number of housing units occupied by low income households over the life of the plan.

A key benefit of CRIAs is that voter approval is not required in order to issue bonded indebtedness.

In addition to substantial formation documentation, CRIAs have significant on-going reporting requirements.

Funding sources and Funding Capacity: Similar to an EIFD.

Use of Funds: The permitted use of CRIA funds is much more expansive than the list of permitted uses under an EIFD. CRIA revenues can be used to acquire land to sell at a discounted price for economic development purposes. CRIAs also have eminent domain authority. While the list of eligible uses is broad, CRIAs are required to use 25% of its revenues on affordable housing and between 15% and 30% of housing built within the boundaries of the CRIA must be affordable.

# **IV. Federal and State Programs**

Federal, state, and regional grants, loans and incentive programs are valuable sources of gap financing and funding for local infrastructure and economic development projects. Many programs are competitive and emphasize investments in areas of economic need. Funding opportunities are myriad and subject to change; what follows is a selection of the most widely used and most applicable sources. The attributes of the programs are summarized in Table 3.

#### **Investment Incentives**

The Federal government sponsors several programs which incentivize private investment in qualifying economic development projects. Qualifying projects in turn gain access to a source of low cost financing, subsidized by federal incentives. The most widely used incentive programs are the following:

New Market Tax Credits: The federal New Market Tax Credit Program (NMTC) provides a source of low-interest financing to businesses located in low-income Census tracts or serving low-income residents via tax credit allocations to financial intermediaries. The Community Development Financial Institutions Fund (CDFI Fund) of the U.S. Department of Treasury awards approximately \$3.5 billion annually in tax credit allocation authority to local, mission-oriented financial intermediaries referred to as Community Development Entities (CDEs). Private individuals and firms earn income tax credits for investing in CDEs provided that CDEs direct investments to qualified projects. Qualified projects include commercial and mixed-use developments located in low-income Census tracts. Low-income Census tracts are characterized by median incomes less than 80% of the metropolitan median or a poverty trade above 20%.

Businesses located in moderate income communities (up to 120% of the metropolitan median income) may qualify if a substantial share (40%-50%) of their employees, customers, or owners are low-income. Federal standards set minimum eligibility requirements. CDEs apply additional criteria in selecting from qualified projects, based on the organization's mission and area of focus. Creditworthiness of the borrower is another important factor, since NTMC investments are typically structured to leverage debt financing.

• Opportunity Zones: Opportunity zones and funds are a new tool created as part of the Tax Cuts and Jobs Act of 2017 to incentivize investment in economically challenged areas. They provide investors with the benefit of deferring taxes due on prior capital gains depending on the length of time that the investment is held. And, if an investor holds a qualified investment for at least ten years, the investor is eligible for an increase in basis of the investment equal to its fair market value on the date that the investment is sold. This eliminates any capital gain on the investment. The regulations on this new tool continue to be clarified.

#### **Grant Programs**

State and federal grants generally prioritize projects in areas of economic need, or that reflect other priorities of sponsoring agencies.

- Community Development Block Grants: The Community Development Block Grant (CDBG) Program, administered by HUD, provides another important source of funding for economic development. CDBG grants awarded to local communities are authorized to fund a range of activities, including site acquisition, infrastructure and direct business assistance, provided that projects address one of three national objectives:
  - 1. Benefit low and moderate income residents;
  - 2. Prevent/eliminate blight
  - 3. Meet an urgent community need.

In addition, HUD regulations specify that seventy percent of all CDBG funds must be spent for the benefit of low and moderate income residents. Benefits to low and moderate income residents can include job creation or retention if more than half of permanent positions will be accessible to low and moderate income residents.

Cities with more than 50,000 residents, known as "entitlement cities," receive annual CDBG grants from HUD on the basis of population and community needs.

Non-entitlement communities must apply for CDBG grant

funding from California's Department of Housing and Community Development.

Public Works Program: A common source of grant funding for economic development projects is the U.S. Economic Development Administration (EDA). The EDA's largest grant program is the Public Works program, which awards competitive grants to local agencies of up to \$3 million toward infrastructure investments necessary to carry out a regional economic development strategy. Eligible projects include water and wastewater infrastructure, industrial parks, and business incubators. Applicants must demonstrate economic distress either through: (1) an unemployment rate above the national rate; (2) incomes below the national median; or (3) special circumstances. Special circumstances arise with the need to prevent the loss of a major or respond to a military base closure, for example. Grant applications are accepted on an ongoing basis.

In order to secure an EDA grant, the County must prepare a Comprehensive Economic Development Strategy (CEDS) or a "CEDS Alternative" that is approved by the EDA. Given the content of other "CEDS Alternatives" that have been approved by the EDA, we recommend using the findings of the Fresno Opportunity Analysis when updating the CEDs.

The USDA offers grant funding for community facilities in rural areas. However, grants are typically limited to communities that demonstrate economic need by having a median income below 90% of the state non-metropolitan median income, in contrast with the more expansive EDA definition. According to the 2010-2014 American Community Survey, incomes in all the above communities exceed the state non-metropolitan median income of \$56,900.

- Brownfield Assistance: State and federal agencies offer various grants and loans to assess and remediate brownfields sites for development purposes (Table 4). Local agencies may target privately owned parcels with permission of the property owner. The California Department of Toxic Substances control offers grants of approximately \$75,000 for site assessment and low-interest loans of up to \$900,000 for site cleanup conducted after an environmental assessment. The EPA offers grants of up to \$200,000 for both assessment and cleanup; cleanup funds require a 20% local contribution.
- Cap and Trade Funds: AHSC Program (Affordable Housing & Sustainable Communities). These funds are administered by the strategic Growth Council and implemented through HCD. The goal of the funds is to incentivize the development of transportation

infrastructure and enhancements, compact, transitoriented affordable housing, and related programs that reduce greenhouse gas emissions (GHGS).

#### **Loan Programs**

Loan programs provide local agencies and private partners with loan guarantees, access to tax exempt bond pools, or other forms of debt financing with favorable rates and terms.

Commonly utilized loan programs include:

- Clean Water State Revolving Fund Program. This program is administered by the State Water Resources Control Board. It provides low cost financing for a wide variety of water quality projects.
- State Infrastructure Bank Industrial Development Bonds: The State Infrastructure Bank's Industrial Development Bonds program funds the acquisition, construction and rehabilitation of manufacturing facilities. Bonds are issued by the State Infrastructure Bank, local Industrial Development Authorities, or Joint Power Authorities. Applications are submitted for specific projects rather than for community wide improvements. IDB financing provides projects up to \$10 million in long-term financing at favorable interest rates. Terms of maturity are limited to 120% of the life of the assets financed. The majority of funds must be dedicated toward production

- purposes; no more than 25% may support investments in office or warehouse space.

  Applications are accepted on an ongoing basis.
- Infrastructure Bank Revolving Loan Program: The State Infrastructure Bank Revolving Loan Fund provides favorable loans of up to \$25 million to local agencies to finance a range of infrastructure projects. Eligible projects include public facilities such as streets, water and waste water infrastructure, as well as private development assistance including the construction of industrial and commercial facilities and related infrastructure. Local agencies determine the revenue source for loan repayment. Applications are accepted on an ongoing basis. It is believed that the I Bank could be a financing source for leveraging EIFD revenues.
- Statewide Community Infrastructure Program: The Statewide Community Infrastructure Program is a tax exempt financing pool administered by the California Statewide Communities Development Authority. Thirty-year, tax-exempt bonds issued by CSCDA are secured by special assessments or a special tax levy. Proceeds may be used to fund public facilities, advance impact fees payable to a local agency, or reimburse developers for the cost of public improvements. The SCIP achieves favorable interest rates by pooling smaller financings into a single bond issuance. SCIP can also assist local agencies

in the establishment of special assessment or community facility districts. Any local agency that is a member of CSCDA is eligible to participate; applications are accepted on an ongoing basis.

Category	Program	Administrator	Type/ Amount	Primary Uses
Investment	New Market Tax Credits	U.S. Department of Treasury	39% tax credit over seven	Commercial projects in low-
Incentives			years	income communities
Loan Programs	Section 108 Loan Program	U.S. Department of Housing and	Loan guarantee up to 5X	Infrastructure and
		Urban Development	annual CDBG allocation	commercial projects
				primarily in areas of
				economic need
	Community Facilities	U.S. Department of Agriculture and	Favorable loans up to \$3	Essential community facilities
	Program	Urban Development	million or loan guarantee	in rural areas
	Revolving Loan Program	State Infrastructure Bank	Favorable loans up to \$25	Infrastructure and
			million	commercial projects
	Industrial Development	State Infrastructure Bank	Favorable loans up to \$10	Manufacturing facilities
	Bonds		million	
	Statewide Community	California Statewide Communities	Tax exempt bond financing	Public facilities
	Infrastructure Program	Development Authority		
<b>Grant Programs</b>	Public Works Program	Economic Development	Up to \$3 million	Infrastructure and
		Administration		commercial projects in areas
				of economic need
Brownfield	Targeted Site Intervention	California Department of Toxic	Grants of \$75,000/site	Environmental site
Assistance	Program	Substances Control (DTSC)		assessment
	Revolving Loan Fund	California Department of Toxic	Favorable loans, up to	Site clean-up
		Substances Control (DTSC)	\$900,000/site	
	Assessment Grants	Environmental Protection Agency	Grants up to \$200,000/site	Environmental site
				assessment
	Cleanup Fund	Environmental Protection Agency	Grants up to \$200,000/	Site clean-up
			site; 20% match	

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Table 1
Program and Overview of Opportunity Sites
Fresno Opportunity Sites Analysis
Fresno, California

		Page 1 of 5								
City <sup>1</sup>			rporated Reedley)	City of	City of Reedley		Unincorporated (near Selma)		City of Selma	
Property <sup>1</sup>		South Inc	South Industrial Site		Manning Bridge Commercial Area		N Selma Opp. Site		Selma Crossing	
Acres <sup>2</sup>		104.4		5	8.5	3	2.7	6	6.1	
Infrastructure/Investments required to ready property for Market <sup>1</sup>		studies estimate wasterwa increas wasterwat	a, Engineering and cost as of water, ater etc. and e in City's er treatment acity.	studies estimate wasterwa increas wasterwat	a, Engineering and cost s for water, ter etc. and e in City's er treatment acity.	99 into improv Engineerin cost estima wasterv Master highway in	Avenue/Hwy erchange vements, g studies and tes for water, vater etc., plan, new terchange at uba Ave.	Avenue interchange for sewer station and water mai and incorindustrial	ntainview e/Hwy 99 e, \$2.2 million line and lift d 450' of 14" n is needed, poration of land-use in nasterplan.	
Target Cluster <sup>1</sup>		Ind	ustrial	Industrial, Hotel and		Industrial		Industrial, Hotel and		
Estimated Development Program <sup>3</sup>	FAR <sup>3</sup>	<u>SF</u>	Land Acres	<u>SF</u>	Land Acres	<u>SF</u>	<b>Land Acres</b>	<u>SF</u>	Land Acres	
Large Light Industrial	0.11	172,000	34.4	0	0.0	0	0.0	38,000	7.6	
Small Light Industrial	0.09	80,000	20.0	160,000	40.0	0	0.0	30,000	7.6	
Heavy Industrial (no rail)	0.11	0	0.0	0	0.0	138,500	27.7	0	0.0	
Heavy Industrial with/rail	0.10	214,500	50.0	0	0.0	0	0.0	0	0.0	
Big Box Distribution	0.14	0	0.0	0	0.0	0	0.0	250,000	40.0	
Industrial Services	0.14	0	0.0	0	0.0	30,000	5.0	30,000	5.0	
Total Industrial GBA		466,500	104.4	160,000	40.0	168,500	32.7	348,000	60.1	
Hotel	0.54	0	0.0	140,000	6.0	0	0.0	70,000	3.0	
Office	0.15	0	0.0	83,000	12.5	0	0.0	20,000	3.0	
Total		466,500	104.4	383,000	58.5	168,500	32.7	438,000	66.1	
Floor to Area Ratio		0.10		0.15		0.12		0.15		

<sup>1.</sup> Source: DSG Advisors.

<sup>2.</sup> See Table 3.

<sup>3.</sup> Estimated based on the development prototypes of catalyst investments provided by DSG Advisors. See Table 24 for details.

Table 1
Program and Overview of Opportunity Sites
Fresno Opportunity Sites Analysis
Fresno, California

		Page 2 of 5								
City <sup>1</sup>		City of	Kingsburg	City of	City of Kingsburg		Unincorporated (near Sanger)		City of Sanger	
Property <sup>1</sup>		Selma S	wap Meet	Hot	el Site	Hwy 180	Commercial	N Av Ind	ustrial Site	
Acres <sup>2</sup>		40.8		5.3		38.8		5	60.6	
Infrastructure/Investments requried to ready property for Market <sup>1</sup>		Avenue interchange and cost e connectic wasterwat infrastructur with dev	ntainview e/Hwy 99 e, Engineering estimates for on of water, cer and other re, Masterplan velopment natives.	for Masterplan with development alternatives.  her development alternatives.  the Cal Fire station on Academy Ave. to the Site, and from Sanger urban boundary near Harrision		configurat Avenue t Avenue; Ma developmen Increase el capacity d distributio	the 5-lane tion of North to Newmark esterplan with at alvernatives; lectric power ton the 12kv n circuit that the site.			
Target Cluster <sup>1</sup>		Ind	ustrial	Hotel and Office		Hotel and Office		Industrial		
Estimated Development Program <sup>3</sup>	FAR <sup>3</sup>	<u>SF</u>	Land Acres	<u>SF</u>	<b>Land Acres</b>	<u>SF</u>	Land Acres	<u>SF</u>	Land Acres	
Large Light Industrial	0.11	39,500	7.9	0	0.0	0	0.0	51,500	10.3	
Small Light Industrial	0.09	31,500	7.9	0	0.0	0	0.0	41,000	10.3	
Heavy Industrial (no rail)	0.11	0	0.0	0	0.0	0	0.0	0	0.0	
Heavy Industrial with/rail	0.10	0	0.0	0	0.0	0	0.0	128,500	30.0	
Big Box Distribution	0.14	125,000	20.0	0	0.0	0	0.0	0	0.0	
Industrial Services	0.14	30,000	5.0	0	0.0	0	0.0	0	0.0	
Total Industrial GBA		226,000	40.8	0	0.0	0	0.0	221,000	50.6	
Hotel	0.54	0	0.0	70,000	3.0	140,000	6.0	0	0.0	
Office	0.15	0	0.0	15,000	2.3	218,500	32.8	0	0.0	
Total		226,000	40.8	85,000	5.3	358,500	38.8	221,000	50.6	
Floor to Area Ratio		0.13		0.37		0.21		0.10		

<sup>1.</sup> Source: DSG Advisors.

<sup>2.</sup> See Table 3.

<sup>3.</sup> Estimated based on the development prototypes of catalyst investments provided by DSG Advisors. See Table 24 for details.

Table 1
Program and Overview of Opportunity Sites
Fresno Opportunity Sites Analysis
Fresno, California

		Page 3 of 5								
City <sup>1</sup>		City of	Mendota	City of I	City of Mendota		City of Kerman		City of Kerman	
Property <sup>1</sup>		Covan	ta Energy	W Pan	oche Rd	Historio	Gwy Sites	South Industrial Site		
Acres <sup>2</sup>		71.0		24	3.5		0.9	4	3.1	
Infrastructure/Investments requried to ready property for Market <sup>1</sup>	Reading from Covanta Energy on future plans for the power plant is needed to determine if the property can be considered for other industrial projects; Details about onsite utilities and infrastructure are needed; Masterplan with development alternatives.  Preliminary engineering and costs estimates are recommended for the connection of water, wastewater, natural gas and electric lines to the site; Masterplan with development alternatives.  Preliminary engineering and work together to develop a downtown plan that will guide and fund conversion of these properties and other projects within the development alternatives.		Masterplan with development alternatives; Secure funding for extension of PG&E service line down W. Commerce Way and on to the property.							
Target Cluster <sup>1</sup>		Ind	ustrial	Industrial		Industrial		Industrial		
Estimated Development Program <sup>3</sup>	FAR <sup>3</sup>	<u>SF</u>	Land Acres	<u>SF</u>	Land Acres	<u>SF</u>	<b>Land Acres</b>	<u>SF</u>	<b>Land Acres</b>	
Large Light Industrial	0.11	65,000	13.0	609,000	121.8	0	0.0	45,000	9.0	
Small Light Industrial	0.09	52,000	13.0	0	0.0	0	0.0	36,000	9.0	
Heavy Industrial (no rail)	0.11	0	0.0	609,000	121.8	0	0.0	100,000	20.0	
Heavy Industrial with/rail	0.10	171,500	40.0	0	0.0	0	0.0	0	0.0	
Big Box Distribution	0.14	0	0.0	0	0.0	0	0.0	0	0.0	
Industrial Services	0.14	30,000	5.0	0	0.0	0	0.0	30,000	5.0	
Total Industrial GBA		318,500	71.0	1,218,000	243.5	0	0.0	211,000	43.1	
Hotel	0.54	0	0.0	0	0.0	0	0.0	0	0.0	
Office	0.15	0	0.0	0	0.0	6,000	0.9	0	0.0	
Total		318,500	71.0	1,218,000	243.5	6,000	0.9	211,000	43.1	
Floor to Area Ratio		0.10		0.11		0.16		0.11		

<sup>1.</sup> Source: DSG Advisors.

<sup>2.</sup> See Table 3.

<sup>3.</sup> Estimated based on the development prototypes of catalyst investments provided by DSG Advisors. See Table 24 for details.

Table 1
Program and Overview of Opportunity Sites
Fresno Opportunity Sites Analysis
Fresno, California

		Page 4 of 5							
City <sup>1</sup>			orporated ler SOI		rporated ler SOI	City of	Firebaugh	City of Firebaugh	
Property <sup>1</sup>		Golden	State Blvd	Hwy 99 at Clovis		Hwy 33 Rail Site		Bullard A	venue Site
Acres <sup>2</sup>		77.1		5	9.6	5	0.0	1	58.8
Infrastructure/Investments requried to ready property for Market <sup>1</sup>		upgrade to Avenue interchange and costs es connection wastewat infrastructu the 'T' int American A	the American e/Hwy 99 e; Engineering timates for the on of water, er and other are; Removing ersection on venue west of e; Masterplan.	upgrade t Avenue intere Engineerie estim recomme connectio wastewate and electri	s studying an o the Clovis e/Hwy 99 change; and costs ates are nded for the on of water, r, natural gas c lines to the ite.	the SP rail line is needed to provide access to the property; Extensions of water, sewer, electric, natural gas, and broadband utility lines from Hwy 33 to the site are needed;  Masterplan with		Preliminary eng. and costs estimates for water connection and other infrastructure; A capacity upgrade to the city's wastewater lift station on the Tomatek property; Masterplan with development alternatives. The possible presence of utility and roadway easements are indicated on some aerial maps. Traffic study.	
Target Cluster <sup>1</sup>		Ind	ustrial	Ind	ustrial	Industrial		Industrial	
Estimated Development Program <sup>3</sup>	FAR <sup>3</sup>	<u>SF</u>	<b>Land Acres</b>	<u>SF</u>	Land Acres	<u>SF</u>	Land Acres	<u>SF</u>	Land Acres
Large Light Industrial	0.11	118,000	23.6	0	0.0	75,000	15.0	397,000	79.4
Small Light Industrial	0.09	0	0.0	79,000	19.8	0	0.0	0	0.0
Heavy Industrial (no rail)	0.11	0	0.0	99,000	19.8	0	0.0	397,000	79.4
Heavy Industrial with/rail	0.10	101,000	23.6	0	0.0	128,500	30.0	0	0.0
Big Box Distribution	0.14	187,500	30.0	125,000	20.0	0	0.0	0	0.0
Industrial Services	0.14	0	0.0	0	0.0	30,000	5.0	0	0.0
Total Industrial GBA		406,500	77.1	303,000	59.6	233,500	50.0	794,000	158.8
Hotel	0.54	0	0.0	0	0.0	0	0.0	0	0.0
Office	0.15	0	0.0	0	0.0	0	0.0	0	0.0
Total		406,500	77.1	303,000	59.6	233,500	50.0	794,000	158.8
Floor to Area Ratio		0.12		0.12		0.11		0.11	

<sup>1.</sup> Source: DSG Advisors.

<sup>2.</sup> See Table 3.

<sup>3.</sup> Estimated based on the development prototypes of catalyst investments provided by DSG Advisors. See Table 24 for details.

Table 1
Program and Overview of Opportunity Sites
Fresno Opportunity Sites Analysis
Fresno, California

		Page 5 of 5					
City <sup>1</sup>		San J	oaquin	San J	oaquin	Total Program	
Property <sup>1</sup>		OPC Rail	OPC Railroad Street		Cherry Lane Ind.		
Acres <sup>2</sup>		4	4.3	8	4.7	1,1	90.1
Infrastructure/Investments requried to ready property for Market <sup>1</sup>		Railroad Street is beyond repair and will require complete reconstruction. Without these improvement, future investment by Wilbur Ellis in San Joaquin could be in jeopardy.		1/3 mile extension of Cherry Lane; Engineering and costs estimates are recommended for the connection of water, wastewater, natural gas and electric lines to the site; Masterplan with development alternatives; The railroad should be contacted and engaged in discussions on how rail service can be brought onto the property.			
Target Cluster <sup>1</sup>		Ind	ustrial	Indu	ıstrial		
Estimated Development Program <sup>3</sup>	FAR <sup>3</sup>	<u>SF</u>	Land Acres	<u>SF</u>	Land Acres	<u>SF</u>	Land Acres
Large Light Industrial	0.11	0	0.0	111,500	22.3	1,721,500	344.3
Small Light Industrial	0.09	0	0.0	89,500	22.3	599,500	149.9
Heavy Industrial (no rail)	0.11	0	0.0	0	0.0	1,343,500	268.7
Heavy Industrial with/rail	0.10	0	0.0	171,500	40.0	915,000	213.6
Big Box Distribution	0.14	0	0.0	0	0.0	687,500	110.0
Industrial Services	0.14	26,000	4.3	0	0.0	206,000	34.3
Total Industrial GBA		26,000	4.3	372,500	84.7	5,473,000	1,120.8
Hotel	0.54	0	0.0	0	0.0	420,000	18.0
Office	0.15	0	0.0	0	0.0	342,500	51.3
Total		26,000	4.3	372,500	84.7	6,235,500	1,190.1
Floor to Area Ratio		0.14		0.10		0.12	

<sup>1.</sup> Source: DSG Advisors.

<sup>2.</sup> See Table 3.

<sup>3.</sup> Estimated based on the development prototypes of catalyst investments provided by DSG Advisors. See Table 24 for details.

Table 2A
Analysis of Tax Increment Revenues Available Per Site Upon Buildout
Fresno Opportunity Sites Analysis
Fresno, California

		Page 1 of 4				
City		Unincorporated <sup>5</sup>	City of Reedley	Unincorporated <sup>5</sup>	City of Selma	City of Kingsburg
		(near Reedley)		(near Selma)		
Property		South Industrial	Manning Bridge <sup>6</sup>	N Selma Opp. Site	Selma Crossing	Selma Swap Meet
riopeity		Site	Manning Bridge	N Seima Opp. Site	Sellila Crossing	Selilla Swap Wieet
Site Acres <sup>1</sup>		104.4	58.5	32.7	66.1	40.8
Gross AV (Buildout) <sup>2</sup>		\$79,049,000	\$65,373,000	\$28,770,000	\$49,095,000	\$22,091,000
(Less) Existing AV <sup>1</sup>		<u>(\$1,448,522)</u>	(\$1,511,781)	<u>(\$893,675)</u>	(\$1,758,000)	<u>(\$2,095,841)</u>
AV Increment		\$77,600,478	\$63,861,219	\$27,876,325	\$47,337,000	\$19,995,159
Annual Base Property Tax I	ncrement					
City Share <sup>1</sup>	<del></del>	0.000%	3.509%	0.000%	14.193%	15.026%
		\$0	\$22,407	\$0	\$67,183	\$30,045
County Share <sup>1</sup>	%	16.407%	16.031%	18.313%	13.485%	13.702%
		\$127,323	\$102,374	\$51,049	\$63,832	\$27,396
Annual Property Tax In-Lie	u of VLF	fresno county VLF 5		fresno county VLF <sup>5</sup>		
2004-05 Vehicle License Fe		\$66,593,570	\$1,233,740	\$66,593,570	\$1,233,811	\$631,405
2004-05 Assessed Valuation	n <sup>3,4</sup>	\$12,249,407,657	\$677,372,636	\$12,249,407,657	\$669,955,474	\$503,370,744
Rate to City	/\$1,000 AV increment	\$5.44	\$1.82	\$5.44	\$1.84	\$1.25
VLF Revenues		\$421,873	\$116,314	\$151,549	\$87,177	\$25,081
Total Available New Reven	ues					
City	<del></del>	\$0	\$138,722	\$0	\$154,361	\$55,127
County		\$549,195	\$102,374	\$202,598	\$63,832	\$27,396
City + County	•	\$549,195	\$241,096	\$202,598	\$218,193	\$82,523

- 1. See Table 3 for details.
- 2. See Tables 6 to 23 for details on the individual properties/sites.
- 3. As per SB 1096, growth of property tax in lieu of VLF is proportional to growth in AV since 2004/05.
- 4. VLF distribution in 2004/05 per the California State Controller's Office.
- 5. Property tax in-lieu of VLF revenues for sites in unincorporated areas is calculated based on actual 2004-05 VLF adjusted amounts, and assessed values for Fresno County.
- 6. A portion of the Manning Bridge Commercial Area falls within an unincorporated area. For the purpose of this analysis, KMA has assumed that the entire consolidated site will produce VLF revenues to the City of Reedley.

Table 2A
Analysis of Tax Increment Revenues Available Per Site Upon Buildout
Fresno Opportunity Sites Analysis
Fresno, California

		Page 2 of 4				
City		City of Kingsburg	Unincorporated <sup>5</sup>	City of Sanger	City of Mendota	City of Mendota
			(near Sanger)			
Property		Hotel Site	Hwy 180	N Av Industrial Site	Covanta Energy	W Panoche Rd
rioperty		Hotel Site	Commercial	IN AV III dustrial site	Covanta Energy	W Fallocite Nu
Site Acres <sup>1</sup>		5.3	38.8	50.6	71.0	243.5
Gross AV (Buildout) <sup>2</sup>		\$16,644,000	\$71,988,000	\$40,788,000	\$57,548,000	\$176,208,000
(Less) Existing AV <sup>1</sup>		<u>(\$711,187)</u>	<u>(\$1,505,933)</u>	<u>(\$815,067)</u>	<u>(\$3,648,207)</u>	<u>(\$1,013,349)</u>
AV Increment		\$15,932,813	\$70,482,067	\$39,972,933	\$53,899,793	\$175,194,651
Annual Base Property Tax In	crement					
City Share <sup>1</sup>	%	13.931%	0.000%	15.729%	11.623%	11.887%
,	,,	\$22,196	\$0	\$62,872	\$62,647	\$208,254
County Share <sup>1</sup>	%	14.863%	17.488%	11.526%	10.755%	11.000%
·		\$23,681	\$123,256	\$46,074	\$57,967	\$192,723
Annual Property Tax In-Lieu	of VLE		fresno county VLF 5			
2004-05 Vehicle License Fee		\$631,405	\$66,593,570	\$1,164,432	\$491,129	\$491,129
2004-05 Assessed Valuation		\$503,370,744	\$12,249,407,657	\$562,329,747	\$144,447,61 <u>8</u>	\$144,447,618
Rate to City	/\$1,000 AV increment	\$1.25	\$5.44	\$2.07	\$3.40	\$3.40
VLF Revenues	7,42,0007.10	\$19,985	\$383,174	\$82,773	\$183,262	\$595,670
Total Available New Revenue	<u>es</u>	4.4	4 -	<b>4</b>	<b>.</b>	Anna c
City		\$42,182	\$0	\$145,645	\$245,909	\$803,925
County		\$23,681	\$506,429	\$46,074	\$57,967	\$192,723
City + County		\$65,863	\$506,429	\$191,719	\$303,876	\$996,648

- 1. See Table 3 for details.
- 2. See Tables 6 to 23 for details on the individual properties/sites.
- 3. As per SB 1096, growth of property tax in lieu of VLF is proportional to growth in AV since 2004/05.
- 4. VLF distribution in 2004/05 per the California State Controller's Office.
- 5. Property tax in-lieu of VLF revenues for sites in unincorporated areas is calculated based on actual 2004-05 VLF adjusted amounts, and assessed values for Fresno County.
- 6. A portion of the Manning Bridge Commercial Area falls within an unincorporated area. For the purpose of this analysis, KMA has assumed that the entire consolidated site will produce VLF revenues to the City of Reedley.

Table 2A
Analysis of Tax Increment Revenues Available Per Site Upon Buildout
Fresno Opportunity Sites Analysis
Fresno, California

		Page 3 of 4				
City		City of Kerman	City of Kerman	Unincorporated <sup>5</sup> (Fowler SOI)	Unincorporated <sup>3</sup> (Flowler SOI)	City of Firebaugh
Property		Historic Gwy Sites	South Industrial Site	Golden State Blvd	Hwy 99 at Clovis	Hwy 33 Rail Site6
Site Acres <sup>1</sup>		0.9	43.1	77.1	59.6	50.0
Gross AV (Buildout) <sup>2</sup>		\$1,224,000	\$31,559,000	\$50,836,000	\$37,954,000	\$41,817,000
(Less) Existing AV <sup>1</sup>		<u>(\$167,583)</u>	<u>(\$2,167,817)</u>	<u>(\$1,102,423)</u>	<u>(\$1,232,893)</u>	<u>(\$1,207,197)</u>
AV Increment		\$1,056,417	\$29,391,183	\$49,733,577	\$36,721,107	\$40,609,803
Annual Base Property Ta	ax Increment					
City Share <sup>1</sup>	%	13.902%	13.902%	0.000%	0.000%	11.719%
		\$1,469	\$40,860	\$0	\$0	\$47,592
County Share <sup>1</sup>	%	12.974%	12.974%	18.263%	18.313%	10.395%
		\$1,371	\$38,134	\$90,829	\$67,246	\$42,213
Annual Property Tax In-I	Lieu of VLF			fresno county VLF <sup>5</sup>	fresno county VLF 5	
2004-05 Vehicle License	Fee Adjusted Amount <sup>3,4</sup>	\$602,190	\$602,190	\$66,593,570	\$66,593,570	\$373,093
2004-05 Assessed Valuat	tion <sup>3,4</sup>	<u>\$284,327,881</u>	<u>\$284,327,881</u>	\$12,249,407,657	\$12,249,407,657	\$185,326,671
Rate to City	/\$1,000 AV increment	\$2.12	\$2.12	\$5.44	\$5.44	\$2.01
VLF Revenues		\$2,237	\$62,249	\$270,375	\$199,633	\$81,754
Total Available New Rev	renues					
City		\$3,706	\$103,109	\$0	\$0	\$129,347
County		\$1,371	\$38,134	\$361,205	\$266,880	\$42,213
City + County	•	\$5,077	\$141,242	\$361,205	\$266,880	\$171,560

- 1. See Table 3 for details.
- 2. See Tables 6 to 23 for details on the individual properties/sites.
- 3. As per SB 1096, growth of property tax in lieu of VLF is proportional to growth in AV since 2004/05.
- 4. VLF distribution in 2004/05 per the California State Controller's Office.
- 5. Property tax in-lieu of VLF revenues for sites in unincorporated areas is calculated based on actual 2004-05 VLF adjusted amounts, and assessed values for Fresno County.
- 6. A portion of the Manning Bridge Commercial Area falls within an unincorporated area. For the purpose of this analysis, KMA has assumed that the entire consolidated site will produce VLF revenues to the City of Reedley.

Table 2A
Analysis of Tax Increment Revenues Available Per Site Upon Buildout
Fresno Opportunity Sites Analysis
Fresno, California

		Page 4 of 4			
City		City of Firebaugh	San Joaquin	San Joaquin	Total
Property		Bullard Avenue Site	OPC Railroad Street	Cherry Lane Ind.	
Site Acres¹		158.8	4.3	84.7	1,190.1
Gross AV (Buildout) <sup>2</sup>		\$114,870,000	\$3,367,000	\$63,731,000	\$952,912,000
(Less) Existing AV <sup>1</sup>		<u>(\$1,566,747)</u>	<u>(\$168,034)</u>	<u>(\$436,463)</u>	(\$23,450,719)
AV Increment		\$113,303,253	\$3,198,966	\$63,294,537	\$929,461,281
Annual Base Property Tax Inc	<u>crement</u>				
City Share <sup>1</sup>	%	17.078%	14.348%	11.725%	
		\$193,498	\$4,590	\$74,213	\$837,829
County Share <sup>1</sup>	%	14.671%	14.447%	11.012%	
		\$166,226	\$4,621	\$69,701	\$1,296,016
Annual Property Tax In-Lieu	of VLF				
2004-05 Vehicle License Fee	Adjusted Amount <sup>3,4</sup>	\$373,093	\$202,138	\$202,138	
2004-05 Assessed Valuation <sup>3</sup>	,4	<u>\$185,326,671</u>	\$60,331,094	\$60,331,094	
Rate to City	/\$1,000 AV increment	\$2.01	\$3.35	\$3.35	
VLF Revenues		\$228,098	\$10,718	\$212,067	\$3,133,991
Total Available New Revenue	es				
City		\$421,596	\$15,308	\$286,280	\$2,545,216
County		\$166,226	\$4,621	\$69,701	\$2,722,620
City + County		\$587,822	\$19,929	\$355,981	\$5,267,836

<sup>1.</sup> See Table 3 for details.

<sup>2.</sup> See Tables 6 to 23 for details on the individual properties/sites.

<sup>3.</sup> As per SB 1096, growth of property tax in lieu of VLF is proportional to growth in AV since 2004/05.

<sup>4.</sup> VLF distribution in 2004/05 per the California State Controller's Office.

<sup>5.</sup> Property tax in-lieu of VLF revenues for sites in unincorporated areas is calculated based on actual 2004-05 VLF adjusted amounts, and assessed values for Fresno County.

<sup>6.</sup> A portion of the Manning Bridge Commercial Area falls within an unincorporated area. For the purpose of this analysis, KMA has assumed that the entire consolidated site will produce VLF revenues to the City of Reedley.

Table 2B
Tax Increment Revenues per City and Loan Debt Supported
Fresno Opportunity Sites Analysis
Fresno, California

			New Annua	al Property Tax Re	venues	
			City	County	Total	Loan Debt
	City	Site Name	Revenues <sup>1</sup>	Revenues <sup>1</sup>	Revenues	Supported <sup>2</sup>
1.	Unincorporated (Near Reedley)	South Industrial Site	\$0	\$549,195	\$549,195	\$7,586,378
2.	City of Reedley	Manning Bridge Commercial Area	\$138,722	\$102,374	\$241,096	\$3,330,412
	City of Reedley Total		\$138,722	\$651,570	\$790,292	\$10,916,790
3.	Unincorporated (Near Selma)	N Selma Opp. Site	\$0	\$202,598	\$202,598	\$2,798,612
4.	City of Selma	Selma Crossing	<u>\$154,361</u>	\$63,832	\$218,1 <u>93</u>	\$3,014,034
	City of Selma Total		\$154,361	\$266,430	\$420,791	\$5,812,646
5.	City of Kingsburg	Selma Swap Meet	\$55,127	\$27,396	\$82,523	\$1,139,940
6.	City of Kingsburg	Hotel Site (Sierra Avenue)	<u>\$42,182</u>	<u>\$23,681</u>	<u>\$65,863</u>	<u>\$909,809</u>
	City of Kingsburg Total		\$97,308	\$51,078	\$148,386	\$2,049,749
7.	Unincorporated (Near Sanger)	Hwy 180 Commercial Site	\$0	\$506,429	\$506,429	\$6,995,623
8.	City of Sanger	N Av Industrial Site (South Industrial)	<u>\$145,645</u>	<u>\$46,074</u>	\$191,71 <u>9</u>	\$2,648,332
	City of Sanger Total		\$145,645	\$552,503	\$698,148	\$9,643,955
9.	City of Mendota	Covanta Energy	\$245,909	\$57,967	\$303,876	\$4,197,633
10	. City of Mendota	W Panoche Rd	<u>\$803,925</u>	\$192,72 <u>3</u>	<u>\$996,648</u>	\$13,767,310
	City of Mendota Total		\$1,049,834	\$250,690	\$1,300,524	\$17,964,943
11	. City of Kerman	Historic Gwy Sites	\$3,706	\$1,371	\$5,077	\$70,128
12	. City of Kerman	South Industrial Site	\$103,10 <u>9</u>	\$38,134	<u>\$141,242</u>	\$1,951,070
	City of Kerman Total		\$106,815	\$39,504	\$146,319	\$2,021,197
13	. Unincorporated Fowler SOI	Golden State Blvd	\$0	\$361,205	\$361,205	\$4,989,543
14	. Unincorporated Fowler SOI	Hwy 99 at Clovis	<u>\$0</u>	\$266,880	<u>\$266,880</u>	\$3,686,574
	Fowler SOI Total		\$0	\$628,084	\$628,084	\$8,676,117
15	. City of Firebaugh	Hwy 33 Rail Site	\$129,347	\$42,213	\$171,560	\$2,369,863
16	. City of Firebaugh	Bullard Avenue Site	<u>\$421,596</u>	\$166,226	<u>\$587,822</u>	\$8,119,944
	City of Firebaugh Total		\$550,942	\$208,439	\$759,381	\$10,489,807

Table 2B
Tax Increment Revenues per City and Loan Debt Supported
Fresno Opportunity Sites Analysis
Fresno, California

		New Annu			
		City	County	Total	Loan Debt
City	Site Name	Revenues <sup>1</sup>	Revenues <sup>1</sup>	Revenues	Supported <sup>2</sup>
17. San Joaquin	OPC Railroad Street	\$15,308	\$4,621	\$19,929	\$275,298
18. San Joaquin	Cherry Lane Ind.	<u>\$286,280</u>	\$69,701	<u>\$355,981</u>	\$4,917,380
City of San Joaquin Total		\$301,588	\$74,322	\$375,910	\$5,192,678
Total (All Sites)		\$2,545,216	\$2,722,620	\$5,267,836	\$72,767,883

- 1. See Table 2A for details.
- 2. Loan assumptions are as follows:

Interest 5.50%
DSCR 1.15
Term (years) 40
Loan Fees 1%

Table 3
Summary of Opportunity Sites and Existing (2018) Assessed Value (AV)
Fresno Opportunity Sites Analysis
Fresno, California

Pag	e 1 of 3									
	Community <sup>1</sup>	Site Name <sup>1</sup>	APN¹	Site Area (Acres) <sup>2</sup>	TRA	City's Share of 1% tax <sup>3</sup>	County's Share of 1% tax <sup>3</sup>	Land AV <sup>3</sup>	Improv.	Total AV <sup>3</sup>
1.	Unincorporated	South Industrial Site	370-020-22	17.0	169-041	0.0000	0.1641	\$340,369	\$126,081	\$466,450
	(Near Reedley)		370-020-23	20.1	169-001	0.0000	0.1641	\$409,634	\$38,374	\$448,008
			370-020-24	21.3	169-001	0.0000	0.1641	\$77,950	\$114,752	\$192,702
			370-020-26	46.0	169-041	0.0000	0.1641	\$194,467	\$146,895	\$341,362
				104.4		0.0000	0.1641	\$1,022,420	\$426,102	\$1,448,522
2.	City of Reedley	Manning Bridge	368-350-17	15.6	169-001	0.0000	0.1641	\$359,871	\$0	\$359,871
		Commercial Area⁴	368-350-19	14.0	008-003	0.1463	0.1484	\$411,993	\$0	\$411,993
			368-350-31	19.4	169-001	0.0000	0.1641	\$385,820	\$133,088	\$518,908
			368-350-32	9.2	169-041	0.0000	0.1641	\$179,245	\$0	\$179,245
			368-350-33	0.2	169-041	0.0000	0.1641	\$41,764	\$0	\$41,764
				58.5		0.0351	0.1603	\$1,378,693	\$133,088	\$1,511,781
3.	Unincorporated (Near Selma)	N Selma Opp. Site	348-060-11	32.7	095-001	0.0000	0.1831	\$822,032	\$71,643	\$893,675
4.	City of Selma	Selma Crossing	393-102-20	33.1	011-075	0.1419	0.1348	\$843,000	\$40,000	\$883,000
			393-102-72	33.0	011-075	0.1419	0.1348	\$840,000	\$35,000	\$875,000
				66.1		0.1419	0.1348	\$1,683,000	\$75,000	\$1,758,000
5.	City of Kingsburg	Selma Swap Meet	393-102-71	5.9	006-050	0.1503	0.1370	\$356,120	\$143,693	\$499,813
			393-240-28	20.4	006-049	0.1503	0.1370	\$619,288	\$0	\$619,288
			393-240-53	14.5	006-050	0.1503	0.1370	\$499,823	\$476,917	\$976,740
				40.8		0.1503	0.1370	\$1,475,231	\$620,610	\$2,095,841
6.	City of Kingsburg	Hotel Site	395-050-38	2.2	006-014	0.1393	0.1486	\$155,111	\$0	\$155,111
		(Sierra Avenue)	395-050-40S	0.8	006-014	0.1393	0.1486	\$31,038	\$0	\$31,038
			395-050-42	2.3	006-014	0.1393	0.1486	\$358,782	\$166,256	\$525,038
				5.3		0.1393	0.1486	\$544,931	\$166,256	\$711,187

Table 3
Summary of Opportunity Sites and Existing (2018) Assessed Value (AV)
Fresno Opportunity Sites Analysis
Fresno, California
Page 2 of 3

Pag	ge 2 of 3									
	Community	Site Name <sup>1</sup>	APN <sup>1</sup>	Site Area (Acres) <sup>2</sup>	TRA	City's Share of 1% tax⁵	County's Share of 1% tax <sup>3</sup>	Land AV <sup>3</sup>	Improv. AV <sup>3</sup>	Total AV <sup>3</sup>
7.	Unincorporated	Hwy 180 Commercial	314-070-35T	6.0	071-018	0.0000	0.1749	\$151,917	\$0	\$151,917
	(Near Sanger)	Site	314-070-37	0.4	071-018	0.0000	0.1749	\$200,000	\$50,000	\$250,000
			314-070-38	0.3	071-018	0.0000	0.1749	\$100,000	\$425,000	\$525,000
			314-070-40	19.5	071-018	0.0000	0.1749	\$304,572	\$23,040	\$327,612
			314-070-49	6.1	071-018	0.0000	0.1749	\$78,351	\$0	\$78,351
			314-070-57	6.4	071-018	0.0000	0.1749	\$146,293	\$26,760	\$173,053
				38.8		0.0000	0.1749	\$981,133	\$524,800	\$1,505,933
8.	City of Sanger	N Av Industrial Site	332-042-26	30.6	009-006	0.1573	0.1153	\$464,578	\$28,518	\$493,096
		(South Industrial)	332-042-28	20.0	009-010	0.1573	0.1153	\$304,015	\$17,956	\$321,971
				50.6		0.1573	0.1153	\$768,593	\$46,474	\$815,067
9.	City of Mendota	Covanta Energy	013-030-615	71.0	012-008	0.1162	0.1075	\$1,985,581	\$1,662,626	\$3,648,207
10.	City of Mendota	W Panoche Rd	019-061-44\$	243.5	012-021	0.1189	0.1100	\$1,013,349	\$0	\$1,013,349
11.	City of Kerman	Historic Gwy Sites	023-144-02	0.4	013-001	0.1390	0.1297	\$73,076	\$18,247	\$91,323
		(N Gwy Bldg #1, #2	023-185-05	0.2	013-011	0.1390	0.1297	\$22,507	\$0	\$22,507
		S Gwy Parking Lot)	023-233-145	0.3	013-011	0.1390	0.1297	\$36,522	\$17,231	\$53,753
				0.9		0.1390	0.1297	\$132,105	\$35,478	\$167,583
12.	City of Kerman	South Industrial Site	023-072-01S	3.6	013-028	0.1390	0.1297	\$237,658	\$0	\$237,658
			023-072-025	1.2	013-028	0.1390	0.1297	\$117,045	\$0	\$117,045
			023-072-035	1.2	013-028	0.1390	0.1297	\$117,045	\$0	\$117,045
			023-072-045	1.2	013-028	0.1390	0.1297	\$110,389	\$292,533	\$402,922
			023-072-075	26.1	013-001	0.1390	0.1297	\$969,000	\$0	\$969,000
			023-072-085	9.7	013-001	0.1390	0.1297	\$324,147	\$0	\$324,147
				43.1		0.1390	0.1297	\$1,875,284	\$292,533	\$2,167,817
13.	Unincorporated (Fowler SOI)	Golden State Blvd	340-070-03	77.1	095-006	0.0000	0.1826	\$761,366	\$341,057	\$1,102,423

Table 3
Summary of Opportunity Sites and Existing (2018) Assessed Value (AV)
Fresno Opportunity Sites Analysis
Fresno, California

Page 3 of 3									
Community	Site Name <sup>1</sup>	APN <sup>1</sup>	Site Area (Acres) <sup>2</sup>	TRA	of 1% tax <sup>3</sup>	County's Share of 1% tax⁵	Land AV <sup>3</sup>	Improv.	Total AV <sup>3</sup>
14. Unincorporated	Hwy 99 at Clovis	340-150-27	14.2	095-001	0.0000	0.1831	\$117,136	\$120,642	\$237,778
(Fowler SOI)		340-150-38	27.8	095-001	0.0000	0.1831	\$650,756	\$45,299	\$696,055
		340-150-39	17.6	095-001	0.0000	0.1831	\$174,510	\$124,550	\$299,060
			59.6		0.0000	0.1831	\$942,402	\$290,491	\$1,232,893
15. City of Firebaugh	Hwy 33 Rail Site⁵	007-061-04	10.0	003-032	0.1172	0.1039	\$232,156	\$46,417	\$278,573
		008-020-61T	40.0	003-032	0.1172	0.1039	\$928,624	\$0	\$928,624
			50.0		0.1172	0.1039	\$1,160,780	\$46,417	\$1,207,197
16. City of Firebaugh	<b>Bullard Avenue Site</b>	012-031-10S	74.4	003-011	0.1708	0.1467	\$516,016	\$0	\$516,016
		012-031-115	40.6	003-011	0.1708	0.1467	\$281,671	\$0	\$281,671
		012-031-36S	29.2	003-011	0.1708	0.1467	\$203,182	\$0	\$203,182
		012-031-375	14.7	003-011	0.1708	0.1467	\$362,163	\$203,715	\$565,878
			158.8		0.1708	0.1467	\$1,363,032	\$203,715	\$1,566,747
17. San Joaquin	OPC Railroad Street	033-050-53\$	4.3	010-000	0.1435	0.1445	\$95,044	\$72,990	\$168,034
18. San Joaquin	Cherry Lane Ind.	033-020-31	84.7	010-005	0.1173	0.1101	\$436,463	\$0	\$436,463
Totals			1190.1				\$18,441,439	\$5,009,280	\$23,450,719

- 1. Community, Site Name and APN as per the information provided by Don Schjeldahl, DSG Advisors (emails dated May 01, 2019, April 24, 2019 and March 03, 2019).
- 2. Source: Real Quest (Tax Year 2018).
- 3. FY 2018-19 Post ERAF AB Factors per information provided by Auditor-Controller's office, County of Fresno.
- 4. The five sites within the Manning Bridge Commercial Area fall within two TRAs. For the purpose of calculating the property tax revenues from this proposed commercial development, KMA has taken the weighted average of City's Share and County's Share of the base 1% property tax.
- 5. Site with APN 314-070-35T could not be located in Real Quest. For the purpose of this analysis, KMA has approximately estimated the site area based on the map provided by DSG Advisors. KMA has also assumed this site falls within the same TRA as the other sites identified within Hwy 180 Commercial Site. Land AV of the site was estimated based on the Land AV per acre of the other land parcels identified within the Hwy Commercial Site.
- 6. Site with APN 008-020-61T could not be located in Real Quest. For the purpose of this analysis, KMA has approximately estimated the site area based on the map provided by DSG Advisors. KMA has also assumed this site falls within the same TRA as the site 007-061-04. Land AV of the site was estimated based on the Land AV per acre of the adjacent site 007-061-04.

Table 4
Building Prototype Assumptions
Fresno Opportunity Sites Analysis
Fresno, California

	Assessed Value	e Assumptions <sup>1</sup>	
	Land Values	Improvements	
Land Use	Per SF Site	Per SF Bldg.	FAR
Industrial			
Large Light Industrial	\$1.1	\$100	0.11
Small Light Industrial	\$1.1	\$120	0.09
Heavy Industrial (no rail)	\$1.1	\$170	0.11
Heavy Industrial with/rail	\$1.1	\$220	0.10
Big Box Distribution	\$1.1	\$70	0.14
Industrial Services	\$1.3	\$120	0.14
Hotel	\$2.0	\$190	0.54
Office	\$5.4	\$170	0.15

<sup>1.</sup> See Table 5 for details.

<sup>2.</sup> FAR as per the development prototypes of catalyst investments provided by DSG Advisors. See Table 24 for details.

Table 5
Building Prototype Details
Fresno Opportunity Sites Analysis
Fresno, California

I. Land Values	Market	Per	Final
(Per SF Site)	Review <sup>1</sup>	DSG Advisors <sup>2</sup>	KMA Assumption <sup>3</sup>
Industrial			
Large Light Industrial	\$2.15	\$0.07	\$1.11
Small Light Industrial	\$2.15	\$0.14	\$1.14
Heavy Industrial (no rail)	\$2.15	\$0.07	\$1.11
Heavy Industrial with/rail	\$2.15	\$0.05	\$1.10
Big Box Distribution	\$2.15	\$0.03	\$1.09
Industrial Services	\$2.15	\$0.46	\$1.31
Hotel	\$2.51	\$1.53	\$2.02
Office	\$2.51	\$1.53 \$1.53	\$2.02 \$5.41
Office	<b>ఫ</b> 9.29	\$1.55	<b>\$5.41</b>
II. Improvement Values	Cost	Per DSG Advisors	Final
Per SF Building)	Review⁴	(incl. equipment) <sup>5</sup>	KMA Assumption <sup>6</sup>
ndustrial			
Large Light Industrial	\$100	\$100	\$100
Small Light Industrial	\$100	\$120	\$120
Heavy Industrial (no rail)	\$190	\$150	\$170
Heavy Industrial with/rail	\$248	\$200	\$220
Big Box Distribution	\$96	\$50	\$70
Industrial Services		\$120	\$120
Hotel	\$191		\$190
Office	\$199	\$150	\$170

<sup>1.</sup> See Tables 26, 27 and 28 for market review of land sales for industrial, office and hotel sites in Fresno County.

<sup>2.</sup> See Table 24 for details. Land value estimates for sites in eastside have been presented here.

<sup>3.</sup> Estimated as the average of market review and DSG figures.

<sup>4.</sup> See Table 25 for Marshall and Swift cost review of industrial, hotel and office developments in Fresno County.

<sup>5.</sup> See Table 24 for details.

<sup>6.</sup> Estimated as the average of cost review and DSG figures.

Table 6
South Industrial Site, Unincorporated (near Reedley) - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

				Estimated Assessed Value Upon Buildout						
<b>Building Program</b>	Acres	FAR	GSF	Land		Improvements incl. Equipments		Total AV		
Industrial										
Large Light Industrial	34.4	0.11	172,000	\$1.1 /SF Land	\$1,665,000	\$100 /GSF	\$17,200,000	\$18,865,000		
Small Light Industrial	20.0	0.09	80,000	\$1.1 /SF Land	\$997,000	\$120 /GSF	\$9,600,000	\$10,597,000		
Heavy Industrial (no rail)	0.0	0.11	0	\$1.1 /SF Land	\$0	\$170 /GSF	\$0	\$0		
Heavy Industrial with/rail	50.0	0.10	214,500	\$1.1 /SF Land	\$2,397,000	\$220 /GSF	\$47,190,000	\$49,587,000		
Big Box Distribution	0.0	0.14	0	\$1.1 /SF Land	\$0	\$70 /GSF	\$0	\$0		
Industrial Services	0.0	0.14	0	\$1.3 /SF Land	\$0	\$120 /GSF	\$0	\$0		
Subtotal - Industrial	104.4		466,500		\$5,059,000		\$73,990,000	\$79,049,000		
Hotel	0.0	0.54	0	\$2.0 /SF Land	\$0	\$190 /GSF	\$0	\$0		
Office	0.0	0.15	0	\$5.4 /SF Land	\$0	\$170 /GSF	\$0	\$0		
TOTAL	104.4		466,500		\$5,059,000		\$73,990,000	\$79,049,000		

Table 7
Manning Bridge Commercial Area, City of Reedley - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

				Estimated Assessed Value Upon Buildout				
<b>Building Program</b>	Acres	FAR	GSF	Land I		Improvements in	ncl. Equipments	Total AV
Industrial								
Large Light Industrial	0.0	0.11	0	\$1.1 /SF Land	\$0	\$100 /GSF	\$0	\$0
Small Light Industrial	40.0	0.09	160,000	\$1.1 /SF Land	\$1,995,000	\$120 /GSF	\$19,200,000	\$21,195,000
Heavy Industrial (no rail)	0.0	0.11	0	\$1.1 /SF Land	\$0	\$170 /GSF	\$0	\$0
Heavy Industrial with/rail	0.0	0.10	0	\$1.1 /SF Land	\$0	\$220 /GSF	\$0	\$0
Big Box Distribution	0.0	0.14	0	\$1.1 /SF Land	\$0	\$70 /GSF	\$0	\$0
Industrial Services	0.0	0.14	0	\$1.3 /SF Land	\$0	\$120 /GSF	\$0	\$0
Subtotal - Industrial	40.0		160,000		\$1,995,000		\$19,200,000	\$21,195,000
Hotel	6.0	0.54	140,000	\$2.0 /SF Land	\$528,000	\$190 /GSF	\$26,600,000	\$27,128,000
Office	12.5	0.15	83,000	\$5.4 /SF Land	\$2,940,000	\$170 /GSF	\$14,110,000	\$17,050,000
TOTAL	58.5		383,000		\$5,463,000		\$59,910,000	\$65,373,000

Table 8
North Selma Opportunity Site, Unincorporated (near Selma) - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

					Estimated As	sessed Value Upor	n Buildout	
<b>Building Program</b>	Acres	FAR	GSF	GSF Land Im		Improvements in	ncl. Equipments	Total AV
Industrial								
Large Light Industrial	0.0	0.11	0	\$1.1 /SF Land	\$0	\$100 /GSF	\$0	\$0
Small Light Industrial	0.0	0.09	0	\$1.1 /SF Land	\$0	\$120 /GSF	\$0	\$0
Heavy Industrial (no rail)	27.7	0.11	138,500	\$1.1 /SF Land	\$1,341,000	\$170 /GSF	\$23,545,000	\$24,886,000
Heavy Industrial with/rail	0.0	0.10	0	\$1.1 /SF Land	\$0	\$220 /GSF	\$0	\$0
Big Box Distribution	0.0	0.14	0	\$1.1 /SF Land	\$0	\$70 /GSF	\$0	\$0
Industrial Services	5.0	0.14	30,000	\$1.3 /SF Land	\$284,000	\$120 /GSF	\$3,600,000	\$3,884,000
Subtotal - Industrial	32.7		168,500		\$1,625,000		\$27,145,000	\$28,770,000
Hotel	0.0	0.54	0	\$2.0 /SF Land	\$0	\$190 /GSF	\$0	\$0
Office	0.0	0.15	0	\$5.4 /SF Land	\$0	\$170 /GSF	\$0	\$0
TOTAL	32.7		168,500		\$1,625,000		\$27,145,000	\$28,770,000

Table 9
Selma Crossing, City of Selma - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis Fresno, California

				Estimated Assessed Value Upon Buildout					
<b>Building Program</b>	Acres	FAR	GSF	Land		Improvements incl. Equipments		Total AV	
Industrial									
Large Light Industrial	7.6	0.11	38,000	\$1.1 /SF Land	\$366,000	\$100 /GSF	\$3,800,000	\$4,166,000	
Small Light Industrial	7.6	0.09	30,000	\$1.1 /SF Land	\$377,000	\$120 /GSF	\$3,600,000	\$3,977,000	
Heavy Industrial (no rail)	0.0	0.11	0	\$1.1 /SF Land	\$0	\$170 /GSF	\$0	\$0	
Heavy Industrial with/rail	0.0	0.10	0	\$1.1 /SF Land	\$0	\$220 /GSF	\$0	\$0	
Big Box Distribution	40.0	0.14	250,000	\$1.1 /SF Land	\$1,897,000	\$70 /GSF	\$17,500,000	\$19,397,000	
Industrial Services	5.0	0.14	30,000	\$1.3 /SF Land	\$284,000	\$120 /GSF	\$3,600,000	\$3,884,000	
Subtotal - Industrial	60.1		348,000		\$2,924,000		\$28,500,000	\$31,424,000	
Hotel	3.0	0.54	70,000	\$2.0 /SF Land	\$264,000	\$190 /GSF	\$13,300,000	\$13,564,000	
Office	3.0	0.15	20,000	\$5.4 /SF Land	\$707,000	\$170 /GSF	\$3,400,000	\$4,107,000	
TOTAL	66.1		438,000		\$3,895,000		\$45,200,000	\$49,095,000	

Table 10
Selma Swap Meet, City of Kingsburg - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

				Estimated Assessed Value Upon Buildout					
<b>Building Program</b>	Acres	FAR	GSF	Land		Improvements incl. Equipments		Total AV	
Industrial									
Large Light Industrial	7.9	0.11	39,500	\$1.1 /SF Land	\$383,000	\$100 /GSF	\$3,950,000	\$4,333,000	
Small Light Industrial	7.9	0.09	31,500	\$1.1 /SF Land	\$395,000	\$120 /GSF	\$3,780,000	\$4,175,000	
Heavy Industrial (no rail)	0.0	0.11	0	\$1.1 /SF Land	\$0	\$170 /GSF	\$0	\$0	
Heavy Industrial with/rail	0.0	0.10	0	\$1.1 /SF Land	\$0	\$220 /GSF	\$0	\$0	
Big Box Distribution	20.0	0.14	125,000	\$1.1 /SF Land	\$949,000	\$70 /GSF	\$8,750,000	\$9,699,000	
Industrial Services	5.0	0.14	30,000	\$1.3 /SF Land	\$284,000	\$120 /GSF	\$3,600,000	\$3,884,000	
Subtotal - Industrial	40.8		226,000		\$2,011,000		\$20,080,000	\$22,091,000	
Hotel	0.0	0.54	0	\$2.0 /SF Land	\$0	\$190 /GSF	\$0	\$0	
Office	0.0	0.15	0	\$5.4 /SF Land	\$0	\$170 /GSF	\$0	\$0	
TOTAL	40.8		226,000		\$2,011,000		\$20,080,000	\$22,091,000	

Table 11
Hotel Site, City of Kingsburg - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

	Acres	FAR	GSF	Estimated Assessed Value Upon Buildout					
<b>Building Program</b>				Land		Improvements incl. Equipments		Total AV	
Industrial									
Large Light Industrial	0.0	0.11	0	\$1.1 /SF Land	\$0	\$100 /GSF	\$0	\$0	
Small Light Industrial	0.0	0.09	0	\$1.1 /SF Land	\$0	\$120 /GSF	\$0	\$0	
Heavy Industrial (no rail)	0.0	0.11	0	\$1.1 /SF Land	\$0	\$170 /GSF	\$0	\$0	
Heavy Industrial with/rail	0.0	0.10	0	\$1.1 /SF Land	\$0	\$220 /GSF	\$0	\$0	
Big Box Distribution	0.0	0.14	0	\$1.1 /SF Land	\$0	\$70 /GSF	\$0	\$0	
Industrial Services	0.0	0.14	0	\$1.3 /SF Land	\$0	\$120 /GSF	\$0	\$0	
Subtotal - Industrial	0.0		0		\$0		\$0	\$0	
Hotel	3.0	0.54	70,000	\$2.0 /SF Land	\$264,000	\$190 /GSF	\$13,300,000	\$13,564,000	
Office	2.3	0.15	15,000	\$5.4 /SF Land	\$530,000	\$170 /GSF	\$2,550,000	\$3,080,000	
TOTAL	5.3		85,000		\$794,000		\$15,850,000	\$16,644,000	

Table 12
Hwy 180 Commercial Site, Unincorporated (near Sanger) - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

	Acres	FAR	GSF	Estimated Assessed Value Upon Buildout					
<b>Building Program</b>				Land		Improvements incl. Equipments		Total AV	
Industrial									
Large Light Industrial	0.0	0.11	0	\$1.1 /SF Land	\$0	\$100 /GSF	\$0	\$0	
Small Light Industrial	0.0	0.09	0	\$1.1 /SF Land	\$0	\$120 /GSF	\$0	\$0	
Heavy Industrial (no rail)	0.0	0.11	0	\$1.1 /SF Land	\$0	\$170 /GSF	\$0	\$0	
Heavy Industrial with/rail	0.0	0.10	0	\$1.1 /SF Land	\$0	\$220 /GSF	\$0	\$0	
Big Box Distribution	0.0	0.14	0	\$1.1 /SF Land	\$0	\$70 /GSF	\$0	\$0	
Industrial Services	0.0	0.14	0	\$1.3 /SF Land	\$0	\$120 /GSF	\$0	\$0	
Subtotal - Industrial	0.0		0		\$0		\$0	\$0	
Hotel	6.0	0.54	140,000	\$2.0 /SF Land	\$528,000	\$190 /GSF	\$26,600,000	\$27,128,000	
Office	32.8	0.15	218,500	\$5.4 /SF Land	\$7,715,000	\$170 /GSF	\$37,145,000	\$44,860,000	
TOTAL	38.8		358,500		\$8,243,000		\$63,745,000	\$71,988,000	

Table 13
North Avenue Industrial Site, City of Sanger - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

				Estimated Assessed Value Upon Buildout						
<b>Building Program</b>	Acres	FAR	GSF	Land		Improvements in	Total AV			
Industrial										
Large Light Industrial	10.3	0.11	51,500	\$1.1 /SF Land	\$497,000	\$100 /GSF	\$5,150,000	\$5,647,000		
Small Light Industrial	10.3	0.09	41,000	\$1.1 /SF Land	\$513,000	\$120 /GSF	\$4,920,000	\$5,433,000		
Heavy Industrial (no rail)	0.0	0.11	0	\$1.1 /SF Land	\$0	\$170 /GSF	\$0	\$0		
Heavy Industrial with/rail	30.0	0.10	128,500	\$1.1 /SF Land	\$1,438,000	\$220 /GSF	\$28,270,000	\$29,708,000		
Big Box Distribution	0.0	0.14	0	\$1.1 /SF Land	\$0	\$70 /GSF	\$0	\$0		
Industrial Services	0.0	0.14	0	\$1.3 /SF Land	\$0	\$120 /GSF	\$0	\$0		
Subtotal - Industrial	50.6		221,000		\$2,448,000		\$38,340,000	\$40,788,000		
Hotel	0.0	0.54	0	\$2.0 /SF Land	\$0	\$190 /GSF	\$0	\$0		
Office	0.0	0.15	0	\$5.4 /SF Land	\$0	\$170 /GSF	\$0	\$0		
TOTAL	50.6		221,000		\$2,448,000		\$38,340,000	\$40,788,000		

Table 14
Covanta Energy Biomass Site, City of Mendota - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

				Estimated Assessed Value Upon Buildout						
<b>Building Program</b>	Acres	FAR	FAR GSF	Land		Improvements in	Total AV			
Industrial										
Large Light Industrial	13.0	0.11	65,000	\$1.1 /SF Land	\$629,000	\$100 /GSF	\$6,500,000	\$7,129,000		
Small Light Industrial	13.0	0.09	52,000	\$1.1 /SF Land	\$648,000	\$120 /GSF	\$6,240,000	\$6,888,000		
Heavy Industrial (no rail)	0.0	0.11	0	\$1.1 /SF Land	\$0	\$170 /GSF	\$0	\$0		
Heavy Industrial with/rail	40.0	0.10	171,500	\$1.1 /SF Land	\$1,917,000	\$220 /GSF	\$37,730,000	\$39,647,000		
Big Box Distribution	0.0	0.14	0	\$1.1 /SF Land	\$0	\$70 /GSF	\$0	\$0		
Industrial Services	5.0	0.14	30,000	\$1.3 /SF Land	\$284,000	\$120 /GSF	\$3,600,000	\$3,884,000		
Subtotal - Industrial	71.0		318,500		\$3,478,000		\$54,070,000	\$57,548,000		
Hotel	0.0	0.54	0	\$2.0 /SF Land	\$0	\$190 /GSF	\$0	\$0		
Office	0.0	0.15	0	\$5.4 /SF Land	\$0	\$170 /GSF	\$0	\$0		
TOTAL	71.0		318,500		\$3,478,000		\$54,070,000	\$57,548,000		

Table 15
West Panoche Road Prison Site, City of Mendota - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

				Estimated Assessed Value Upon Buildout							
<b>Building Program</b>	Acres	FAR	GSF	Land		Improvements i	Total AV				
Industrial											
Large Light Industrial	121.8	0.11	609,000	\$1.1 /SF Land	\$5,889,000	\$100 /GSF	\$60,900,000	\$66,789,000			
Small Light Industrial	0.0	0.09	0	\$1.1 /SF Land	\$0	\$120 /GSF	\$0	\$0			
Heavy Industrial (no rail)	121.8	0.11	609,000	\$1.1 /SF Land	\$5,889,000	\$170 /GSF	\$103,530,000	\$109,419,000			
Heavy Industrial with/rail	0.0	0.10	0	\$1.1 /SF Land	\$0	\$220 /GSF	\$0	\$0			
Big Box Distribution	0.0	0.14	0	\$1.1 /SF Land	\$0	\$70 /GSF	\$0	\$0			
Industrial Services	0.0	0.14	0	\$1.3 /SF Land	\$0	\$120 /GSF	\$0	\$0			
Subtotal - Industrial	243.5		1,218,000		\$11,778,000		\$164,430,000	\$176,208,000			
Hotel	0.0	0.54	0	\$2.0 /SF Land	\$0	\$190 /GSF	\$0	\$0			
Office	0.0	0.15	0	\$5.4 /SF Land	\$0	\$170 /GSF	\$0	\$0			
TOTAL	243.5		1,218,000		\$11,778,000		\$164,430,000	\$176,208,000			

Table 16
Historic Gateway Sites, City of Kerman - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

					Buildout				
<b>Building Program</b>	Acres	FAR	FAR GSF	Land		Improvements incl. Equipments		Total AV	
Industrial									
Large Light Industrial	0.0	0.11	0	\$1.1 /SF Land	\$0	\$100 /GSF	\$0	\$0	
Small Light Industrial	0.0	0.09	0	\$1.1 /SF Land	\$0	\$120 /GSF	\$0	\$0	
Heavy Industrial (no rail)	0.0	0.11	0	\$1.1 /SF Land	\$0	\$170 /GSF	\$0	\$0	
Heavy Industrial with/rail	0.0	0.10	0	\$1.1 /SF Land	\$0	\$220 /GSF	\$0	\$0	
Big Box Distribution	0.0	0.14	0	\$1.1 /SF Land	\$0	\$70 /GSF	\$0	\$0	
Industrial Services	0.0	0.14	0	\$1.3 /SF Land	\$0	\$120 /GSF	\$0	\$0	
Subtotal - Industrial	0.0		0		\$0		\$0	\$0	
Hotel	0.0	0.54	0	\$2.0 /SF Land	\$0	\$190 /GSF	\$0	\$0	
Office	0.9	0.15	6,000	\$5.4 /SF Land	\$204,000	\$170 /GSF	\$1,020,000	\$1,224,000	
TOTAL	0.9		6,000		\$204,000		\$1,020,000	\$1,224,000	

Table 17
South Industrial Site, City of Kerman - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

				Estimated Assessed Value Upon Buildout						
<b>Building Program</b>	Acres	FAR	GSF	Land		Improvements in	Total AV			
Industrial										
Large Light Industrial	9.0	0.11	45,000	\$1.1 /SF Land	\$437,000	\$100 /GSF	\$4,500,000	\$4,937,000		
Small Light Industrial	9.0	0.09	36,000	\$1.1 /SF Land	\$451,000	\$120 /GSF	\$4,320,000	\$4,771,000		
Heavy Industrial (no rail)	20.0	0.11	100,000	\$1.1 /SF Land	\$967,000	\$170 /GSF	\$17,000,000	\$17,967,000		
Heavy Industrial with/rail	0.0	0.10	0	\$1.1 /SF Land	\$0	\$220 /GSF	\$0	\$0		
Big Box Distribution	0.0	0.14	0	\$1.1 /SF Land	\$0	\$70 /GSF	\$0	\$0		
Industrial Services	5.0	0.14	30,000	\$1.3 /SF Land	\$284,000	\$120 /GSF	\$3,600,000	\$3,884,000		
Subtotal - Industrial	43.1		211,000		\$2,139,000		\$29,420,000	\$31,559,000		
Hotel	0.0	0.54	0	\$2.0 /SF Land	\$0	\$190 /GSF	\$0	\$0		
Office	0.0	0.15	0	\$5.4 /SF Land	\$0	\$170 /GSF	\$0	\$0		
TOTAL	43.1		211,000		\$2,139,000		\$29,420,000	\$31,559,000		

Table 18
Golden State Blvd at American Ave, Fowler SOI - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

				Estimated Assessed Value Upon Buildout						
<b>Building Program</b>	Acres	FAR	GSF	Land		Improvements in	Total AV			
Industrial										
Large Light Industrial	23.6	0.11	118,000	\$1.1 /SF Land	\$1,139,000	\$100 /GSF	\$11,800,000	\$12,939,000		
Small Light Industrial	0.0	0.09	0	\$1.1 /SF Land	\$0	\$120 /GSF	\$0	\$0		
Heavy Industrial (no rail)	0.0	0.11	0	\$1.1 /SF Land	\$0	\$170 /GSF	\$0	\$0		
Heavy Industrial with/rail	23.6	0.10	101,000	\$1.1 /SF Land	\$1,129,000	\$220 /GSF	\$22,220,000	\$23,349,000		
Big Box Distribution	30.0	0.14	187,500	\$1.1 /SF Land	\$1,423,000	\$70 /GSF	\$13,125,000	\$14,548,000		
Industrial Services	0.0	0.14	0	\$1.3 /SF Land	\$0	\$120 /GSF	\$0	\$0		
Subtotal - Industrial	77.1		406,500		\$3,691,000		\$47,145,000	\$50,836,000		
Hotel	0.0	0.54	0	\$2.0 /SF Land	\$0	\$190 /GSF	\$0	\$0		
Office	0.0	0.15	0	\$5.4 /SF Land	\$0	\$170 /GSF	\$0	\$0		
TOTAL	77.1		406,500		\$3,691,000		\$47,145,000	\$50,836,000		

Table 19
Hwy 99 at Clovis, Fowler SOI - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

				Estimated Assessed Value Upon Buildout						
<b>Building Program</b>	Acres	FAR	GSF	Land	Land		ncl. Equipments	Total AV		
Industrial										
Large Light Industrial	0.0	0.11	0	\$1.1 /SF Land	\$0	\$100 /GSF	\$0	\$0		
Small Light Industrial	19.8	0.09	79,000	\$1.1 /SF Land	\$987,000	\$120 /GSF	\$9,480,000	\$10,467,000		
Heavy Industrial (no rail)	19.8	0.11	99,000	\$1.1 /SF Land	\$958,000	\$170 /GSF	\$16,830,000	\$17,788,000		
Heavy Industrial with/rail	0.0	0.10	0	\$1.1 /SF Land	\$0	\$220 /GSF	\$0	\$0		
Big Box Distribution	20.0	0.14	125,000	\$1.1 /SF Land	\$949,000	\$70 /GSF	\$8,750,000	\$9,699,000		
Industrial Services	0.0	0.14	0	\$1.3 /SF Land	\$0	\$120 /GSF	\$0	\$0		
Subtotal - Industrial	59.6		303,000		\$2,894,000		\$35,060,000	\$37,954,000		
Hotel	0.0	0.54	0	\$2.0 /SF Land	\$0	\$190 /GSF	\$0	\$0		
Office	0.0	0.15	0	\$5.4 /SF Land	\$0	\$170 /GSF	\$0	\$0		
TOTAL	59.6		303,000		\$2,894,000		\$35,060,000	\$37,954,000		

Table 20
Hwy 33 Rail Site, City of Firebaugh - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

				Estimated Assessed Value Upon Buildout						
<b>Building Program</b>	Acres	FAR	GSF	Land		Improvements incl. Equipments		Total AV		
Industrial										
Large Light Industrial	15.0	0.11	75,000	\$1.1 /SF Land	\$725,000	\$100 /GSF	\$7,500,000	\$8,225,000		
Small Light Industrial	0.0	0.09	0	\$1.1 /SF Land	\$0	\$120 /GSF	\$0	\$0		
Heavy Industrial (no rail)	0.0	0.11	0	\$1.1 /SF Land	\$0	\$170 /GSF	\$0	\$0		
Heavy Industrial with/rail	30.0	0.10	128,500	\$1.1 /SF Land	\$1,438,000	\$220 /GSF	\$28,270,000	\$29,708,000		
Big Box Distribution	0.0	0.14	0	\$1.1 /SF Land	\$0	\$70 /GSF	\$0	\$0		
Industrial Services	5.0	0.14	30,000	\$1.3 /SF Land	\$284,000	\$120 /GSF	\$3,600,000	\$3,884,000		
Subtotal - Industrial	50.0		233,500		\$2,447,000		\$39,370,000	\$41,817,000		
Hotel	0.0	0.54	0	\$2.0 /SF Land	\$0	\$190 /GSF	\$0	\$0		
Office	0.0	0.15	0	\$5.4 /SF Land	\$0	\$170 /GSF	\$0	\$0		
TOTAL	50.0		233,500		\$2,447,000		\$39,370,000	\$41,817,000		

Table 21
Bullard Avenue Site, City of Firebaugh - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

				Estimated Assessed Value Upon Buildout							
<b>Building Program</b>	Acres	FAR	GSF	Land		Improvements incl. Equipments		Total AV			
Industrial											
Large Light Industrial	79.4	0.11	397,000	\$1.1 /SF Land	\$3,840,000	\$100 /GSF	\$39,700,000	\$43,540,000			
Small Light Industrial	0.0	0.09	0	\$1.1 /SF Land	\$0	\$120 /GSF	\$0	\$0			
Heavy Industrial (no rail)	79.4	0.11	397,000	\$1.1 /SF Land	\$3,840,000	\$170 /GSF	\$67,490,000	\$71,330,000			
Heavy Industrial with/rail	0.0	0.10	0	\$1.1 /SF Land	\$0	\$220 /GSF	\$0	\$0			
Big Box Distribution	0.0	0.14	0	\$1.1 /SF Land	\$0	\$70 /GSF	\$0	\$0			
Industrial Services	0.0	0.14	0	\$1.3 /SF Land	\$0	\$120 /GSF	\$0	\$0			
Subtotal - Industrial	158.8		794,000		\$7,680,000		\$107,190,000	\$114,870,000			
Hotel	0.0	0.54	0	\$2.0 /SF Land	\$0	\$190 /GSF	\$0	\$0			
Office	0.0	0.15	0	\$5.4 /SF Land	\$0	\$170 /GSF	\$0	\$0			
TOTAL	158.8		794,000		\$7,680,000		\$107,190,000	\$114,870,000			

Table 22
OPC Railroad Street Site, San Joaquin - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

				Estimated Assessed Value Upon Buildout						
<b>Building Program</b>	Acres	FAR	FAR GSF	Land		Improvements in	Total AV			
Industrial										
Large Light Industrial	0.0	0.11	0	\$1.1 /SF Land	\$0	\$100 /GSF	\$0	\$0		
Small Light Industrial	0.0	0.09	0	\$1.1 /SF Land	\$0	\$120 /GSF	\$0	\$0		
Heavy Industrial (no rail)	0.0	0.11	0	\$1.1 /SF Land	\$0	\$170 /GSF	\$0	\$0		
Heavy Industrial with/rail	0.0	0.10	0	\$1.1 /SF Land	\$0	\$220 /GSF	\$0	\$0		
Big Box Distribution	0.0	0.14	0	\$1.1 /SF Land	\$0	\$70 /GSF	\$0	\$0		
Industrial Services	4.3	0.14	26,000	\$1.3 /SF Land	\$247,000	\$120 /GSF	\$3,120,000	\$3,367,000		
Subtotal - Industrial	4.3		26,000		\$247,000		\$3,120,000	\$3,367,000		
Hotel	0.0	0.54	0	\$2.0 /SF Land	\$0	\$190 /GSF	\$0	\$0		
Office	0.0	0.15	0	\$5.4 /SF Land	\$0	\$170 /GSF	\$0	\$0		
TOTAL	4.3		26,000		\$247,000		\$3,120,000	\$3,367,000		

Table 23
Cherry Lane Industrial Site, San Joaquin - Development Program and Estimate of Assessed Value Upon Buildout Fresno Opportunity Sites Analysis
Fresno, California

				Estimated Assessed Value Upon Buildout						
Building Program	Acres	FAR	GSF	Land		Improvements in	Total AV			
Industrial										
Large Light Industrial	22.3	0.11	111,500	\$1.1 /SF Land	\$1,080,000	\$100 /GSF	\$11,150,000	\$12,230,000		
Small Light Industrial	22.3	0.09	89,500	\$1.1 /SF Land	\$1,114,000	\$120 /GSF	\$10,740,000	\$11,854,000		
Heavy Industrial (no rail)	0.0	0.11	0	\$1.1 /SF Land	\$0	\$170 /GSF	\$0	\$0		
Heavy Industrial with/rail	40.0	0.10	171,500	\$1.1 /SF Land	\$1,917,000	\$220 /GSF	\$37,730,000	\$39,647,000		
Big Box Distribution	0.0	0.14	0	\$1.1 /SF Land	\$0	\$70 /GSF	\$0	\$0		
Industrial Services	0.0	0.14	0	\$1.3 /SF Land	\$0	\$120 /GSF	\$0	\$0		
Subtotal - Industrial	84.7		372,500		\$4,111,000		\$59,620,000	\$63,731,000		
Hotel	0.0	0.54	0	\$2.0 /SF Land	\$0	\$190 /GSF	\$0	\$0		
Office	0.0	0.15	0	\$5.4 /SF Land	\$0	\$170 /GSF	\$0	\$0		
TOTAL	84.7		372,500		\$4,111,000		\$59,620,000	\$63,731,000		

Table 24
Development Prototypes of Catalyst Investments for Fresno Opportunity Sites
Fresno Opportunity Sites Analysis
Fresno, California

		<b>Building Size</b>	Site Size		Land	Value		Invesment		Invesment
	Project Type	(GSF)	(Acres)	Westside		Eastsi	de	 Bldg/Equip.		(\$/SF)
		_		\$ total	\$/SF land	<u>\$ total</u>	\$/SF land			
1.	Large Light Industrial	200,000 SF	40	\$80,000	\$0.05	\$120,000	\$0.07	\$20,000,000	0.11	\$100
2.	Small Light Industrial	80,000 SF	20	\$80,000	\$0.09	\$120,000	\$0.14	\$9,600,000	0.09	\$120
3.	Heavy Industrial (no rail)	200,000 SF	40	\$80,000	\$0.05	\$120,000	\$0.07	\$30,000,000	0.11	\$150
4.	Heavy Industrial with/rail	300,000 SF	70	\$100,000	\$0.03	\$150,000	\$0.05	\$60,000,000	0.10	\$200
5.	Big Box Distribution	500,000 SF	80	\$90,000	\$0.03	\$90,000	\$0.03	\$25,000,000	0.14	\$50
6.	Industrial Services	30,000 SF	5	\$100,000	\$0.46	\$100,000	\$0.46	\$3,600,000	0.14	\$120
7.	Hotel (100 rooms) <sup>1</sup>	70,000 SF	3	\$200,000	\$1.53	\$200,000	\$1.53		0.54	
8.	Office	20,000 SF	3	\$200,000	\$1.53	\$200,000	\$1.53	\$3,000,000	0.15	\$150

Source: Don Schjeldahl, DSG Advisors (email dated April 24, 2019)

1. Building size estimated based on 700 GSF per room.

Table 25 RS Means Construction Cost Review Fresno Opportunity Sites Analysis Fresno, California

		<u>\$/SF</u>	Regional Multipliers	<u>Local</u> Multipliers	adjusted \$/SF
Industrial	Light Manufacturing				
Class A	Type Avg	\$81	0.98	1.26	\$100.02
Class A	Type Low Cost	\$56	0.98	1.26	\$69.15
Class B	Type Avg	\$77	0.99	1.26	\$95.43
Class B	Type Low Cost	\$53	0.99	1.26	\$66.11
Class C	Type Good	\$73	1.01	1.28	\$93.73
Class C	Type Avg	\$52	1.01	1.28	\$67.23
Class C	Type Low Cost	\$38	1.01	1.28	\$48.80
Industrial	Heavy Manufacturing				
Class A	Type Excellent	\$250	0.98	1.26	\$308.70
Class A	Type Good	\$201	0.98	1.26	\$248.19
Class A	Type Avg	\$154	0.98	1.26	\$190.16
Class A	Type Low Cost	\$119	0.98	1.26	\$146.94
Class B	Type Excellent	\$242	0.99	1.26	\$301.87
Class B	Type Good	\$194	0.99	1.26	\$242.00
Class B	Type Avg	\$148	0.99	1.26	\$184.62
Class B	Type Low Cost	\$115	0.99	1.26	\$143.45
Distributi	on Warehouses				
Class A	Type Avg	\$107	0.98	1.26	\$132.12
Class A	Type Low Cost	\$81	0.98	1.26	\$100.02
Class B	Type Avg	\$102	0.99	1.26	\$127.23
Class B	Type Low Cost	\$77	0.99	1.26	\$96.05
Hotel - Lir	mited Service				
Class A	Type Excellent	\$185	0.98	1.26	\$228.44
Class A	Type Good	\$155	0.98	1.26	\$191.39
Class A	Type Avg	\$134	0.98	1.26	\$165.46
Class A	Type Low Cost	\$112	0.98	1.26	\$138.30
Office					
Class C	Type Excellent	\$220	1.01	1.28	\$284.89
Class C	Type Good	\$154	1.01	1.28	\$199.13
Class C	Type Avg	\$109	1.01	1.28	\$141.25
Class C	Type Low Cost	\$74	1.01	1.28	\$95.27

Source: RS Means

Table 26 Industrial Land Sales in Fresno County, June 2016 to June 2019 Fresno Opportunity Sites Analysis Fresno, California

	Address	Sale Date	Acres	Sale Price	\$/Ac	\$/SF	Improvements
1.	3721 N Golden State Blvd Fresno, CA	6/15/2016	5.08	\$1,214,698	\$239,114	\$5.49	OS, RG
2.	1638-1642 W Jensen Ave Fresno, CA	8/14/2018	14.9	\$1,000,000	\$67,114	\$1.54	DL
3.	W Dan Ronquillo Dr Fresno, CA	12/12/2018	8.5	\$370,260	\$43,560	\$1.00	OS, RG
4.	3059 S Cherry Ave Fresno, CA	9/26/2018	14.46	\$363,500	\$25,138	\$0.58	OS, RG
Sale	Price Per Acre Summary				Per Acre	Per SF	
Mir	nimum				\$25,138	\$0.58	
Ма	ximum				\$239,114	<b>\$5.49</b>	
Me	dian				<i>\$55,337</i>	\$1.27	
Ме	an				\$93,732	\$2.15	

### Improvements Legend

OS Off-site improvements including Curb/Gutter/Sidewalk, Electricity, Gas, Sewer, Streets, Water

RG Rough Graded

RL Raw land

DL Previously Developed Lot

Note: Improvement information is not available for all properties.

Source: Costar 2019

FL Finished Lot

Table 27
Office/Retail/Commercial Land Sales in Fresno County, June 2016 to June 2019
Fresno Opportunity Sites Analysis
Fresno, California

Page 1 of 2 Address	Sale Date	Acres	Sale Price	\$/Ac	\$/SF	Improvements
1. 7351 N Cedar Ave Fresno, CA	2/4/2019	4.24	\$2,770,500	\$653,420	\$15.00	OS, RL
NEQ Herndon Ave & Tollhou Rd Clovis, CA	11/13/2018	4.64	\$2,125,000	\$457,974	\$10.51	RL
3. 1254 N Peach Ave Fresno, CA	7/25/2017	4.03	\$1,200,000	\$297,767	\$6.84	OS, RL
4. 550 N Bush Ave Clovis, CA	1/24/2018	1.94	\$1,120,000	\$577,320	\$13.25	OS, RL
5. E Fir Ave Fresno, CA	4/2/2018	3.11	\$1,055,000	\$339,228	\$7.79	OS, RG
6. W Herndon Ave Fresno, CA	3/6/2017	2.96	\$1,050,000	\$354,730	\$8.14	OS
7. 340 W Fir Ave Clovis, CA	2/28/2017	1.96	\$932,000	\$475,510	\$10.92	OS, RL
8. E Fir Ave Fresno, CA	9/4/2018	1.3	\$700,000	\$538,462	\$12.36	FL
9. 2351-2355 Willow Ave Clovis, CA	8/15/2016	2.52	\$650,000	\$257,937	\$5.92	OS, RG
10. 372 W Spruce Ave Clovis, CA	2/14/2017	0.91	\$475,000	\$521,978	\$11.98	OS, RL
11. 392 W Spruce Ave Clovis, CA	2/14/2017	0.91	\$475,000	\$521,978	\$11.98	OS, RL

Table 27
Office/Retail/Commercial Land Sales in Fresno County, June 2016 to June 2019
Fresno Opportunity Sites Analysis
Fresno, California

Page 2 of 2

Address	Sale Date	Acres	Sale Price	\$/Ac	\$/SF	Improvements
12. 159 W Glenn Ave Coalinga, CA	11/18/2016	1.18	\$230,000	\$194,915	\$4.47	DL
13. 145 N Clovis Ave Clovis, CA	4/25/2018	0.22	\$115,000	\$522,727	\$12.00	OS
14. 4398 Spaatz Ave Fresno, CA	6/12/2018	0.4	\$105,000	\$262,500	\$6.03	OS, RL
15. 1710 Sanger Ave Fresno, CA	3/6/2018	0.55	\$50,000	\$90,909	\$2.09	RL
Sale Price Per Acre Summary				Per Acre	Per SF	
Minimum				\$90,909	\$2.09	
Maximum				\$653,420	\$15.00	
Median				\$457,974	\$10.51	
Mean				\$404,490	\$9.29	

### Improvements Legend

OS Off-site improvements including Curb/Gutter/Sidewalk, Electricity, Gas, Sewer, Streets, Water

RG Rough Graded

RL Raw land

DL Previously Developed Lot

Note: Improvement information is not available for all properties.

Source: Costar 2019

FL Finished Lot

Table 28
Hotel/Commercial Land Sales in Fresno County, June 2016 to June 2019
Fresno Opportunity Sites Analysis
Fresno, California

	Address	Sale Date	Acres	Sale Price	\$/Ac	\$/SF	Improvements
1.	40885 Shaver Forest Rd Shaver Lake, CA	5/19/2017	0.58	\$89,000	\$153,448	\$3.52	DL
2.	3121 W Shields Ave Fresno, CA	12/27/2018	16.8	\$1,100,000	\$65,476	\$1.50	OS, RG
Sale	e Price Per Acre Summary				Per Acre	Per SF	
Mir	nimum				\$65,476	\$1.50	
Ma	ximum				<i>\$153,448</i>	\$3.52	
Me	dian				\$109,462	\$2.51	
Me	an				\$109,462	\$2.51	

## Improvements Legend

OS Off-site improvements including Curb/Gutter/Sidewalk, Electricity, Gas, Sewer, Streets, Water

FL Finished Lot

RG Rough Graded

RL Raw land

DL Previously Developed Lot

Note: Improvement information is not available for all properties.

Source: Costar 2019



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