



# Appendices

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# Appendix A: Current Economic Conditions

The Economic Development Strategy reflects and responds to current economic conditions in Oakland, including industry and real estate trends and the ways that Oakland residents are participating in, or being impacted by, the city's economic growth.

This Appendix provides an overview of key economic data, including:

- Employment and industry growth
- Emerging industry trends
- Anchor institutions, large firms, and the Port of Oakland
- Real estate trends
- Participation in Oakland's economy and disparities by income, neighborhood, and race
- Disaster preparedness and resilience

## Employment and Industry Growth

Oakland's economy has recovered strongly from the recession of the late 2000s. Between 2010 and mid-2017, the City added more than 25,000 new jobs, bringing the total within the City to over 180,000. Oakland employment, or the number of employed Oaklanders, is also approximately 24 percent higher than the pre-recession peak in 2008 (Figure 1). The city accounts for approximately a quarter of the employees in Alameda County, a share that has remained stable since 2008.

Oakland's economy has both dynamism and stability, characterized by large, legacy institutions – many of which have been in operation in the city for decades – and small businesses that can be either local-serving or global in reach. As of 2016, 91 percent of firms in Oakland had fewer than 20 people, accounting for 69 percent of all jobs.

## Oakland's Key Sectors

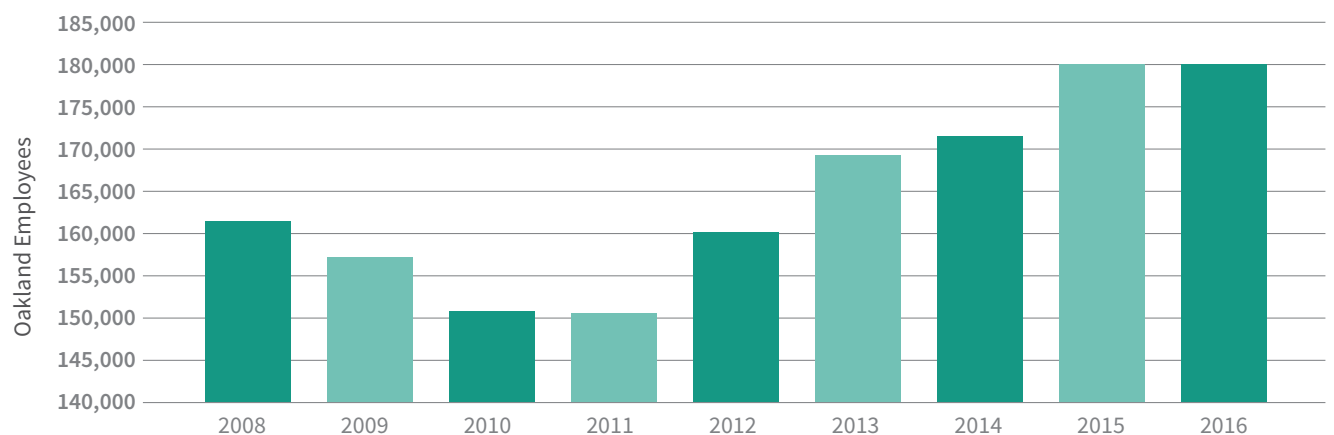
For nearly two decades, Oakland has maintained a steady focus on maintaining and supporting the growth of the same key sectors: health and wellness, transportation and logistics, manufacturing, food production, green and clean technology, arts and culture, and retail. In the last two years, the City has added support for the tech and tourism sectors due to rapid job growth in both fields. The City is also monitoring and developing regulations and policies to support the emergence of the legal cannabis industry.

National economic shifts are having an impact in Oakland, including the rise of on-demand work and an increase in service jobs and growth in sustainability industries like solar and green technology. Oakland's primary economy continues to be driven by many of the same employment sectors and

industry clusters that have dominated the city's employment base for a hundred years.

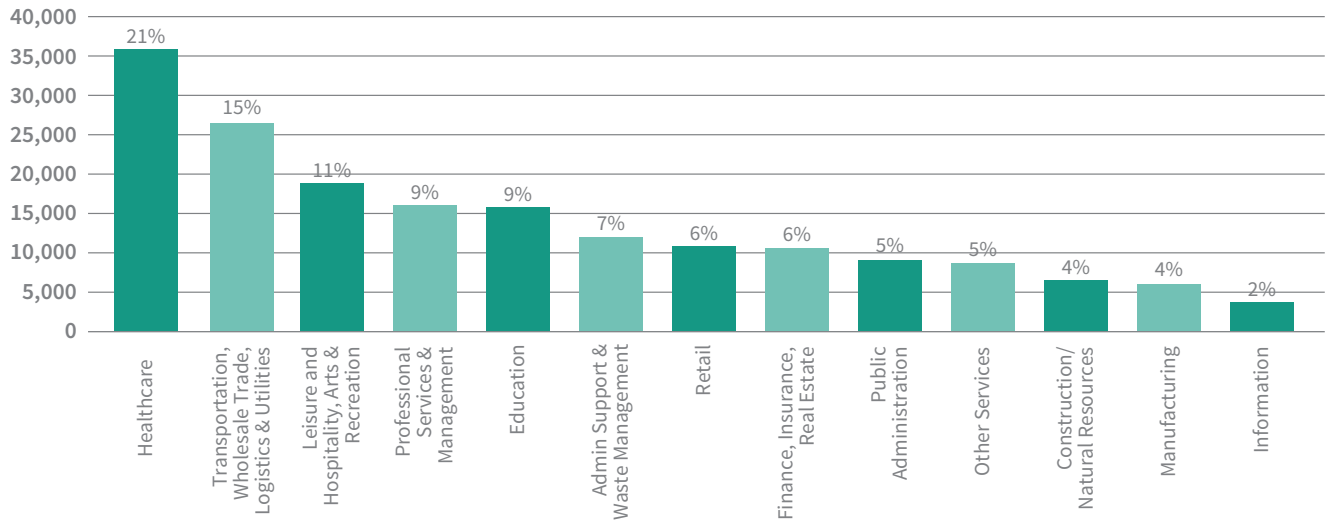
As shown in Figure 2, health care is the city's largest sector, followed by transportation and logistics, leisure and hospitality, professional services and management, and education. Health care and transportation and logistics, in particular, have been among Oakland's largest sectors for many years. In both sectors, Oakland accounts for approximately 40 percent of all jobs in Alameda County. Oakland also has a high share of countywide employment in education (approximately 60 percent), other services (30 percent), and finance, insurance, and real estate (27 percent). Leisure, hospitality, and retail employment has grown significantly in the past five years, as reflected in national attention on the food and arts scene.

Figure 1. Oakland Employment, 2008-2016



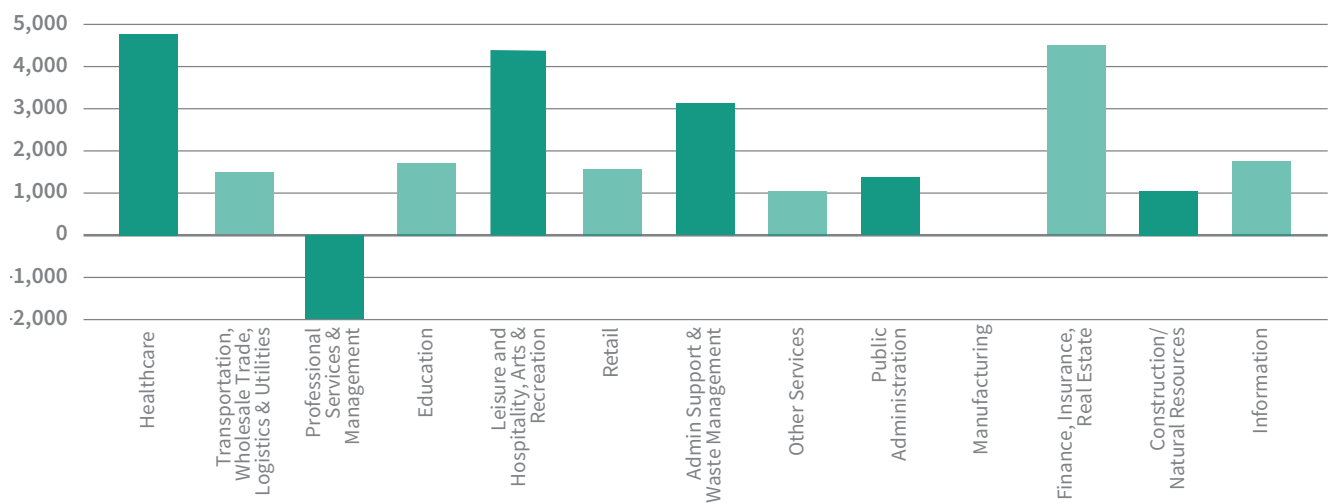
Source: CA Employment Development Department, Oakland Metropolitan Chamber of Commerce and Beacon Economics, City of Oakland, 2016

Figure 2. Oakland Employment, 2008-2016



Source: California Employment Development Department, Oakland Metropolitan Chamber of Commerce and Beacon Economics, City of Oakland, 2016

Figure 3. Oakland Employment, 2008-2016



Source: California Employment Development Department, Oakland Metropolitan Chamber of Commerce and Beacon Economics, City of Oakland, 2016

# Emerging Industry Trends that are Changing Oakland's Physical and Economic Environment

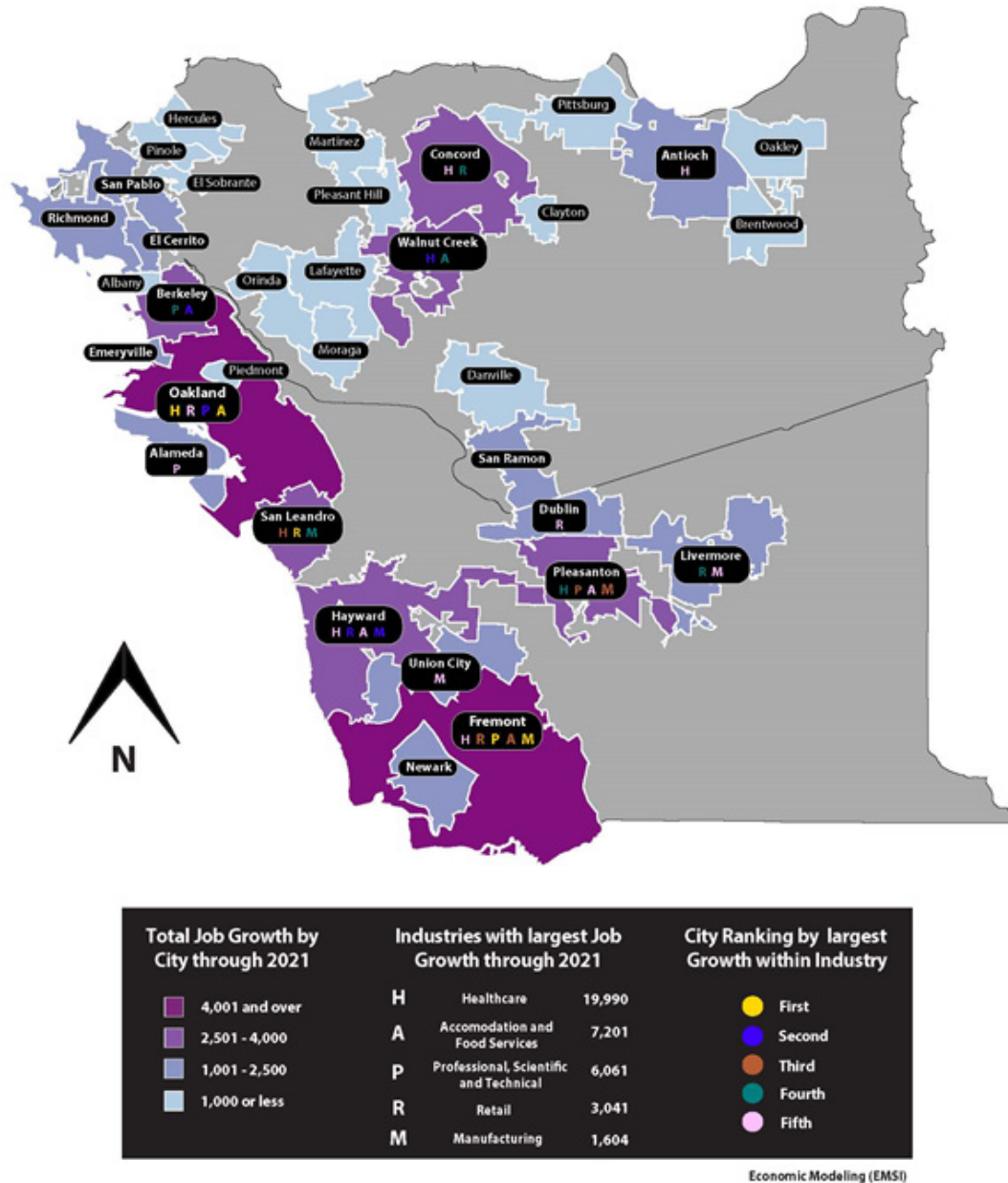
While Oakland's economy continues to be driven by many of the same longstanding sectors and clusters that have provided stability and resiliency over the long-term, these sectors are evolving in significant ways. Some of these changes are reflected in new job growth. Other changes have had less of an impact on total employment, but are still creating noticeable changes in specific locations within the city.

Some of these emerging trends include:

- Rapid growth in health care, education, leisure and hospitality, and information: Figure 3 shows employment change by sector between 2010 and 2016. As shown, the health care sector added the most jobs during this period. However, education, leisure and hospitality, and information grew at the fastest rate, adding 20 to 30 percent more employees. In particular, the strong growth in the information sector reflects the growth of technology firms in Oakland, while the growth in leisure and hospitality – a category that includes restaurants – speaks to Oakland's growing reputation as a tourist and food destination. Most of these technology, restaurant, and entertainment businesses are locating in Oakland's downtown.
- Evolving manufacturing, transportation, and logistics sectors: As shown in Figure 3, manufacturing and transportation and logistics experienced relatively slow growth between 2010 and 2016, constrained by an aging industrial building stock in need of major improvements. However, while some large manufacturing companies (for example, in the food processing and furniture production industries) have closed, the manufacturing sector in Oakland is moving towards smaller scale, more specialized production, including 3-D printing and other advanced manufacturing. City efforts to stay on top of the manufacturing sector's evolving labor needs include programs like "Design It-Build It-Ship It," a consortium of East Bay community colleges and workforce boards that received a \$15 million grant to support job training for manufacturing workers.
- Growth of innovative business models, financing tools, and economic development efforts: While Oakland businesses receive a significant share of venture capital investment, many local businesses also use crowdfunding to grow. The City of Oakland, for example, encourages this model by serving as a trustee for the Kiva Oakland program, which enables individual lenders to invest directly in small businesses. Oakland also has a high proportion of social entrepreneurs and B-Corporations, a form of incorporation which provides a legal framework for businesses to pursue both profit and a social/environmental purpose.



Map 1: Projected East Bay Job Growth



Map 1 is a projection of job growth in five significant East Bay sectors. Oakland is expected to lead the East Bay in Healthcare and Accommodation and Food Service job growth, and to also add jobs in both the Retail and Professional/Scientific/Technical industry sectors.

# Anchor Institutions, Large Firms and the Port of Oakland

Large firms have significant workforce, contracting, and real estate needs. Anchor institutions, which are defined both by size and the extent to which their operations are tied to their location in Oakland, can play a valuable role as partners in the City's efforts to further inclusive economic development. In addition to directly employing tens of thousands of workers, these institutions have significant procurement requirements that support additional economic activity. Moreover, many of these institutions have made significant real estate investments in Oakland, giving them a shared interest in Oakland's long-term success.

Stronger relationships between Oakland's anchors and the local economy have the potential to boost workforce pathways, expand local businesses, and increase business and city resiliency. Two distinct efforts are underway to expand the role that these institutions play in hiring and contracting with Oakland residents and businesses, including low-income workers and people of color – especially since many of the non-profit and public institutions primarily serve low-income clients.

1. Anchors for Resilient Communities (ARC). ARC is a cross-institutional coalition supported by the California Endowment, San Francisco Foundation, Kresge Foundation and Kaiser Permanente, which aims to leverage the assets and the capacities of East Bay institutional anchors to develop healthy and prosperous communities, with a focus on meeting the needs of under-served neighborhoods in Richmond and Oakland. This study is working with the Democracy Collaborative and Emerald Cities to identify business opportunities to provide products and services to local anchors.
2. The Alameda County Health and Social Services Agency has an anchors' study underway that includes Kaiser Permanente, the Port of Oakland, Alameda County, and Caltrans, with a focus on workforce development and boys and men of color.

## Top 20 Employers in Oakland, 2016:

- Kaiser Permanente/  
Kaiser Foundation (12,150)
- County of Alameda (4,500)
- City of Oakland (3,500)
- BART (3,300)
- State of California (3,170)
- UCSF Children's Hospital  
Oakland (2,675)
- Alameda Health Systems  
(Highland Hospital) (2,300)
- Southwest Airlines (2,250)
- Oakland Unified School District  
(2,150)
- Sutter Hospitals, Medical Foundation,  
& Support Services (2,250)
- University of California (1,750)
- Securitas Security Services (1,565)
- East Bay Municipal Utility District  
(1,550)
- US Postal Service (1,425)
- Federal Express (1,350)
- United Parcel Service (1,320)
- Pandora (1,100)
- Allied Barton Security Services (975)
- Manos Home Care (975)
- East Bay Regional Park District (950)
- U.S. Department of the Treasury (750)
- Peralta Community Colleges (750)
- Alameda Superior Court (680)
- Ovations Fanfare (650)
- Clorox (640)

Source: City of Oakland, CA Employment Development Department



# The Port of Oakland

The Port of Oakland is an independent department of the City of Oakland which operates through its Board of Port Commissioners. The Port manages 20 miles of property along Oakland's waterfront from the Oakland International Airport to Jack London Square and the Seaport. The Port operates under a separate budget from the City and uses no local tax dollars. All Port of Oakland assets – whether land, cash, or intangible – are property of the State of California and subject to the California Tidelands Trust Doctrine. Trust assets may be used for statewide trust purposes only. The Seaport continues to invest in grade separations, intelligent transportation systems, and traffic circulation railroad improvements, as well as in refrigerated

port facilities and a new logistics complex, expected to grow the Port's volume by an additional 30,000 containers a year. Oakland International Airport, the second largest airport in the third busiest U.S. air service market, serves more than 12 million passengers annually and is the top cargo airport in the Bay Area. It currently serves more than 60 destinations, the most in its history.



## Port of Oakland Top Ten Containerized Commodities

Exports			Imports		
Commodity	Metric Tons	Share	Commodity	Metric Tons	Share
Wood Pulp	1 535 834	20%	Beverages & Spirits	629 678	9%
Edible Fruits and Nuts	1 076 155	14%	Furniture	512 401	7%
Meats	449 456	6%	Glass & Glassware	355 979	5%
Beverages & Spirits	439 476	6%	Electrical Machinery	288 160	4%
Cereals	414 188	5%	Plastics	252 946	4%
Oil Seeds and Olaginous Fruits	392 240	5%	Wood and Articles of Wood	246 684	4%
Preparations of Vegetables	305 569	4%	Articles of Iron & Steel	234 485	3%
Iron & Steel	288 652	3%	Machinery	229 514	3%
Plastic and Article of Plastic	238 652	3%	Rubber	218 729	3%
Aluminum and Article of Aluminum	123 873	2%	Paper and Paperboard	210 567	3%
<b>Top 10 Total</b>	<b>5 601 369</b>	<b>73%</b>	<b>Top 10 Total</b>	<b>3 179 143</b>	<b>46%</b>
<b>All Others</b>	<b>2 112 837</b>	<b>27%</b>	<b>All Others</b>	<b>3 703 442</b>	<b>54%</b>
<b>Total</b>	<b>7 714 206</b>	<b>100%</b>	<b>Grand Total</b>	<b>6 882 585</b>	<b>100%</b>

In 2009, the Port of Oakland committed to achieving an 85% reduction in seaport-related diesel health risk by 2020 from a 2005 baseline. Since then, the Port has had a \$38 million grant program to upgrade and replace the oldest trucks operating at the Port; a ban on trucks that are not compliant with statewide emissions

requirements; shipping companies switching to cleaner burning, low sulfur fuel; and a \$65 million project to construct a power grid that ships can plug into at berth rather than relying on auxiliary diesel engines. Overall diesel particulate matter emissions have decreased by 76%.<sup>1</sup>

<sup>1</sup>Port of Oakland, Port Overview Presentation, 2017

## Real Estate Trends

Oakland has a diverse range of employment space opportunities, from older industrial and warehouse spaces in West Oakland and along the I-880 corridor, to a mix of class A, B, and C office buildings in the Downtown. Residents from Oakland and around the Bay Area may still live with the memory of high office and retail vacancies in Downtown and other areas, and may be unaware of activities within the city's industrial buildings. Today, however, vacancy rates across the office, industrial, and retail sectors are very low, and prices for both commercial and residential space have increased significantly. Meanwhile, Oakland's high quality of life, the City's continued investments, and the growing regional economy are also attracting increased real estate development activity. These trends are reshaping the city's office, industrial, retail, and residential markets.

### Office

Oakland has approximately 27 million square feet of office space, making it the largest office market in the East Bay. The overall vacancy rate fell to 4% at the end of 2016, lower than at any time since the dot-com boom of the early 2000s, lower than San Francisco and lower than the East Bay average. Correspondingly, rents have also

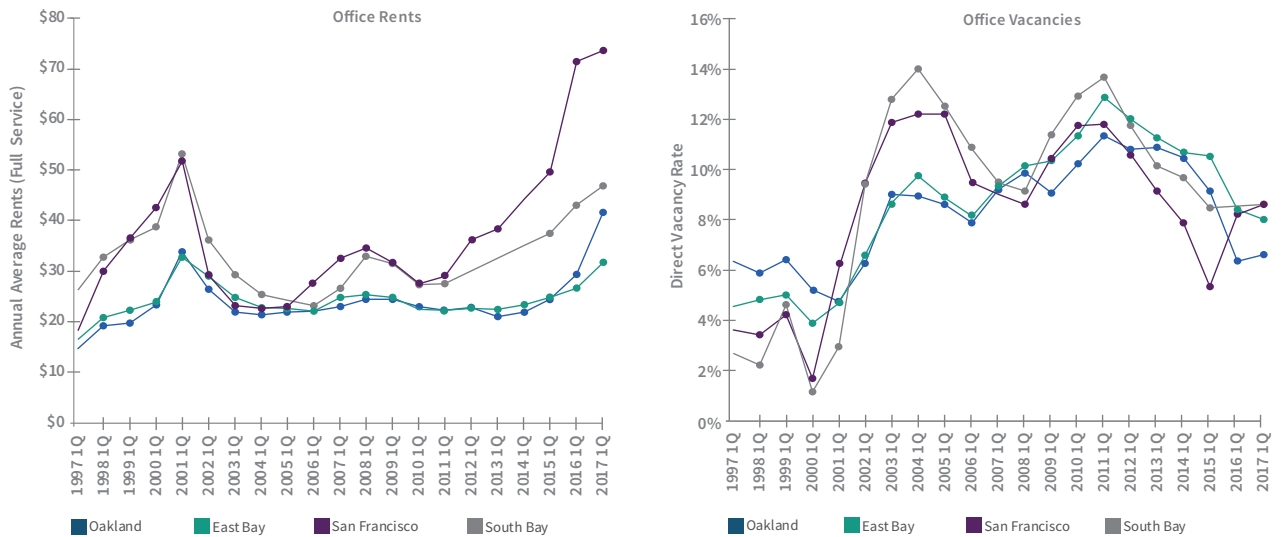
spiked since mid-2014 (Figure 4). Inventory is particularly limited for businesses looking for spaces in the 25,000-square-foot range.

The city's office space is concentrated in Downtown. The greater Downtown area has approximately 19 million square feet of office space (69 percent of the city's office inventory), including approximately 8.5 million square feet of Class A space (99% of the city's Class A inventory).<sup>2</sup> This office concentration reflects Downtown Oakland's status as the largest and most densely concentrated employment center in the East Bay region, and one of the largest employment centers in the Bay Area. The broader Downtown Oakland area – including Broadway-Valdez, Chinatown, and areas near the Lake Merritt BART station – is estimated to contain nearly 84,000 jobs and to form the largest employment center in the East Bay.<sup>3</sup> The majority of jobs in Downtown are in office-based sectors including professional and scientific services, finance, and information. Approximately one-third of Downtown employment is in the public sector.

<sup>2</sup>Includes the Downtown Specific Plan Area and Chinatown. Source: Strategic Economics, "Demographic and Market Data and Findings for the PDA Profile," Downtown Oakland Specific Plan, September 2015.

<sup>3</sup>SPUR, "A Downtown for Everyone: Shaping the Future of Downtown Oakland," September 2015.

Figure 4. Office Rents and Vacancy Rates: Oakland and the East Bay, 1997-2017



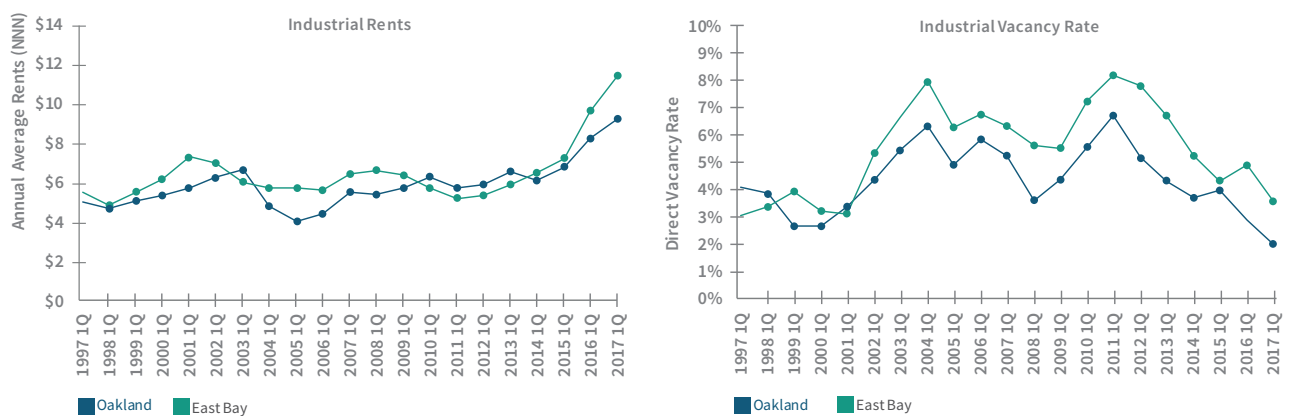
Source: CoStar, 2017; Strategic Economics, City of Oakland. South Bay Data from Kidder Matthews.

## Industrial

Oakland has approximately 33 million square feet of industrial space, concentrated in West Oakland near the port, around the airport and along the I-880 corridor. As of mid-2014, Oakland's industrial vacancy was the fifth lowest in the country, and the vacancy rate has continued to fall since that time (Figure 5).

There is particularly strong demand for small storage and manufacturing spaces, especially for food production. Many of the remaining vacant spaces in Oakland require extensive renovations, or currently have renovations underway.

Figure 5. Industrial Rents and Vacancy Rates: Oakland and the East Bay, 1997-2017



Source: CoStar, 2017; Strategic Economics, City of Oakland.

Oakland's significant inventory of industrial space, combined with the city's excellent transportation access, allows the city to function as a major regional hub for transportation, distribution, and warehousing. Food and beverage production, printing, packaging, fabricated metals, and home construction materials are all booming along the I-880 corridor, which is the most competitive location for manufacturing and distribution in the Bay Area. At the same time, limited space availability and high prices are putting pressure on existing businesses that occupy industrial space. This includes many artists, makers, and small entrepreneurs who struggle to find or maintain affordable space to stay and grow in Oakland.

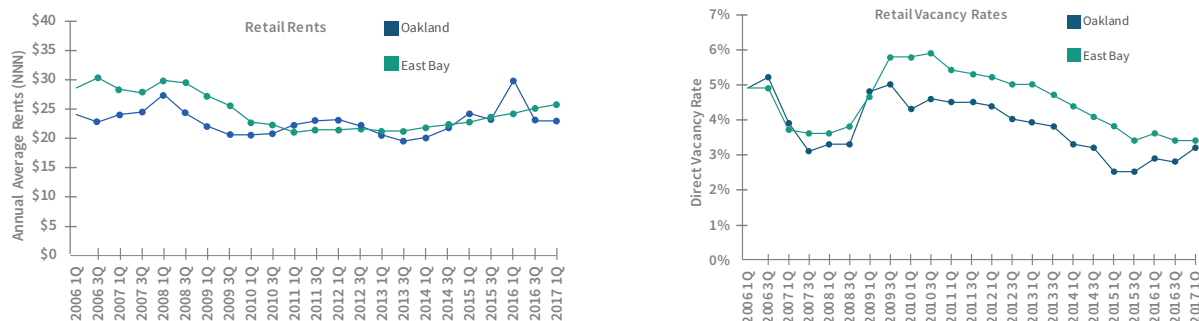
## Retail

Oakland has 55 distinct shopping districts, featuring a wide range of small, locally-owned specialty and food shops, neighborhood-serving stores, unique ethnic shops, upscale boutiques, and over 50 regional and national retailers. Overall,

the city's retail vacancy rate is very low, falling under 3% in 2015, well below the East Bay average (Figure 6).

However, this average masks significant differences in performance among the city's neighborhood retail corridors. Many of the vacancies in Downtown have been filled, and commercial districts in North Oakland and the hills are thriving. Since the passage of the Broadway/Valdez Specific Plan, the district has attracted proposals for hundreds of thousands of square feet of new retail, including a new shopping center anchored by Sprouts grocery store. The recent renovation and expansion of the Foothill Square Shopping Center in East Oakland also provides improved access to food, groceries, and other goods and services for residents. At the same time, districts in other parts of the city still have significant vacancy rates, and many neighborhoods in East and West Oakland lack access to full-service grocery stores as well as other retailers serving daily needs. In addition, many small, family-owned retailers throughout the city could benefit from assistance in marketing, improving storefronts, planning for succession, and other areas.

Figure 6. Retail Rents and Vacancy Rates: Oakland and the East Bay, 1997-2017



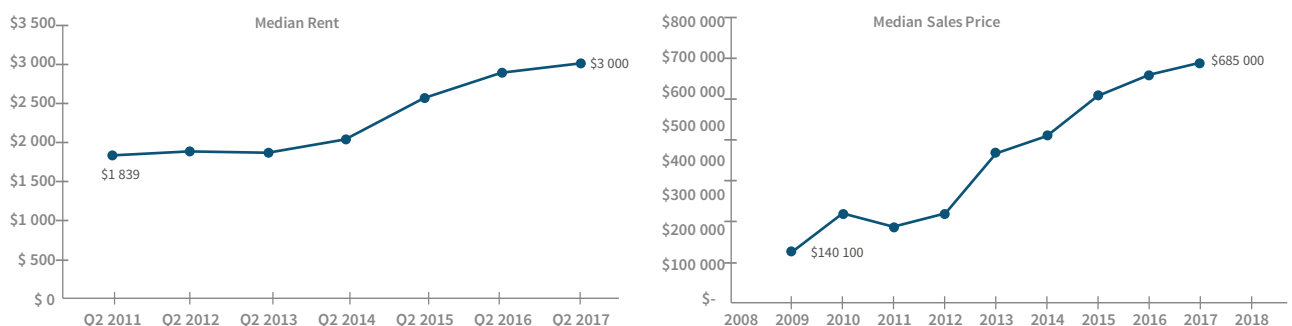
## Residential

Strong employment growth throughout the Bay Area has led to rapidly increasing housing costs in Oakland. Rents and sales prices have spiked since 2011 (Figure 7) and Oakland continues to experience some of the fastest rising housing prices in the country. Job growth in San Francisco has created market pressure for Oakland to accommodate higher-income households, creating mounting concerns about the displacement of existing residents. Increasing housing costs are arguably the most significant challenge currently facing Oakland residents. To this end, the City has adopted the Housing Equity Roadmap to recommend and implement new policies in support of housing, with the ultimate goals to protect affordability in 17,000 households for Oaklanders where they currently live, and build 17,000 new homes throughout the city for people of all incomes. The Strategy recognizes this work as essential to maintaining the City's economic development goals.

One of the most significant changes in Oakland's economy in the last decade is the rapid escalation of home values and rents.

Just over 3,000 housing units were under construction in the first half of 2017 in Oakland, and an additional 17,000 units – including at least 1,130 affordable or senior units – were planned or proposed. Most of the recent development activity is concentrated in Downtown and North Oakland, with additional current and proposed projects in West Oakland, around all the BART stations, and in other transit-accessible locations such as the International Boulevard corridor (Map 2). In East Oakland, the planned developments at Brooklyn Basin (3,100 units) and Oak Knoll (935 planned units) are the largest residential projects in the Strategy's three-year time horizon.

Figure 7. Residential Rent and Sales Price Trends: Oakland



Source: CoStar, 2017; Strategic Economics, City of Oakland. South Bay Data from Kidder Matthews



The City must ensure through zoning and cross-departmental coordination that sufficient land is preserved for industrial and other employment uses.



This map displays the Oakland area, including Berkeley, Piedmont, Emeryville, Alameda, and San Leandro. It highlights major project types and upcoming requests for proposals (RFPs) for city-owned properties. The map includes a legend, a scale bar (1 mile), and a north arrow.

**Legend**

- Major Project Type**
  - Commercial / Industrial / Civic (Red dot)
  - Mixed Use (Blue dot)
  - Residential (Green dot)
- Upcoming RFPs for City-Owned Properties** (Yellow dot)
- Non Residential Building Permits Over \$200K Jan 2013 to Sept 2014** (Black dot)

**Scale:** 1 Mile

**North Arrow:** NORTH

# Participation in Oakland's Economy and Disparities by Income, Neighborhood, and Race

Oakland's growing economy benefits many of the city's residents. However, ensuring that residents across Oakland, including low-income residents and people of color, have equal access to employment remains a challenge. This section discusses how residents benefit from Oakland's economic growth as well as persistent economic disparities by neighborhood and race/ethnicity.

## Employment

As the local and regional employment base has grown, Oakland's unemployment rate has fallen from a high of 16% in 2009 to under 6% by the end of 2015. The gap between the City and County unemployment rates has also declined. Between 2000 and 2012, Oakland's unemployment rate averaged 3 percentage points higher than Alameda County's. This difference shrank to just over 1 percentage point by the middle of 2015 (Figure 8).

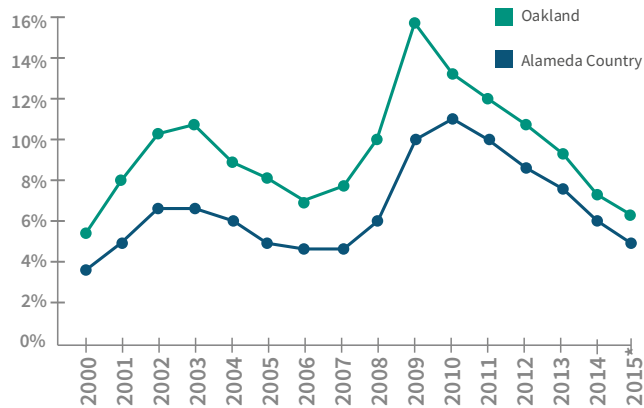
While Oakland's unemployment rate has decreased significantly on average, unemployment in some neighborhoods remains much higher than in others. Map 3 shows unemployment rates by zip code. The lowest unemployment rates are found in North Oakland (including zip codes 94608,

94609, and 94610) and the Oakland hills (zip codes 94602, 94611, 94618, and 94619). The highest unemployment rates are found in East Oakland (including zip codes 94601, 94603, 94605, and 94621) and West Oakland (94607). Note that this unemployment rate only counts residents who are actively looking for work as unemployed and does not reflect discouraged workers who are no longer looking or those who are underemployed.

Another way to show the geographic variation in Oakland's economic growth is transit ridership. Thanks to an influx of new residents and jobs, BART ridership at the Downtown-19th St. Station has increased 42% since 2010. The Coliseum Station saw ridership increase only 4% in the same time period.

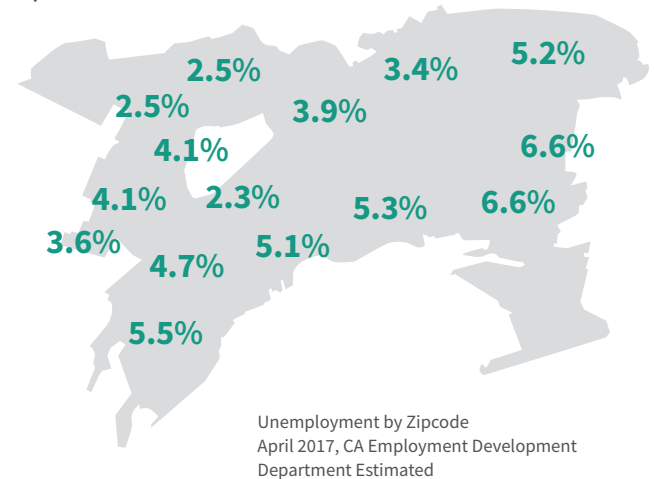
While the unemployment rate also reveals racial disparities, the unemployment gap has shrunk considerably in the last couple of years. Unemployment for Black Oaklanders shrunk from 25% in 2013 to 9% in 2015, lower than the state's 11% Black unemployment rate. Latino/a and Asian unemployment also dropped from 11% to 7% and 8%, respectively.

Figure 8. Unemployment Rates: Oakland and Alameda County, 2000-2015



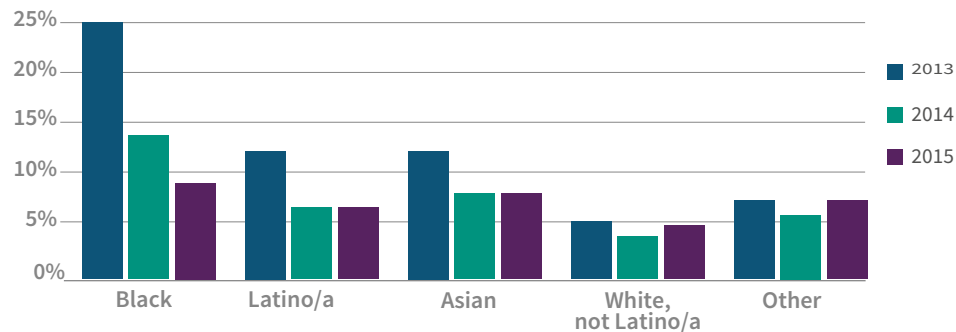
Sources: CA Employment Development Department

Map 3. Unemployment Rate by Zip Code, April 2017



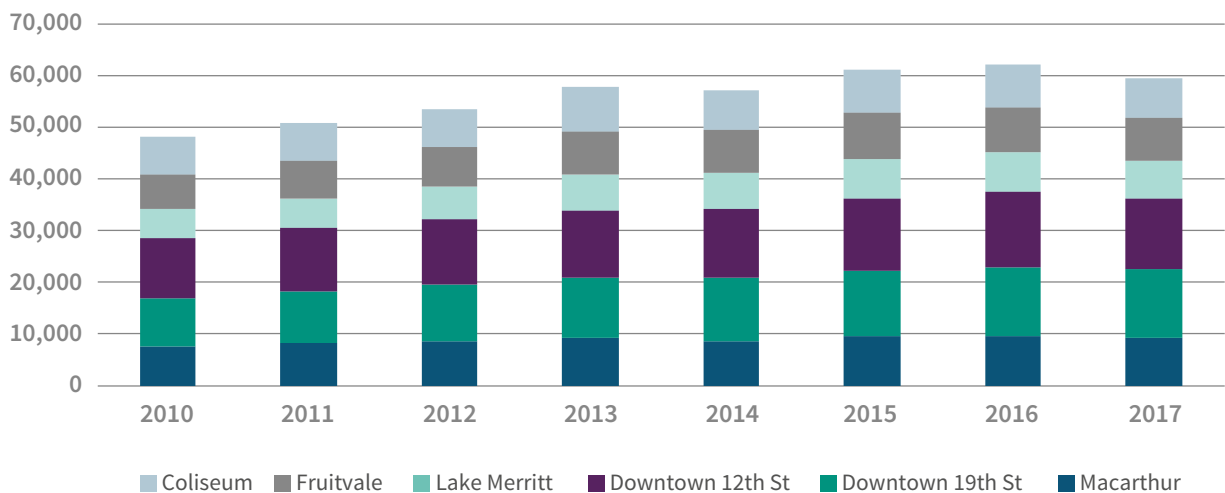
Unemployment by Zipcode  
April 2017, CA Employment Development  
Department Estimated

Figure 9: Unemployment by Race and Ethnicity, 2013 - 2015



Sources: US Census Bureau, American Community Survey; City of Oakland, 2015

Figure 10. Oakland BART Station Weekday exits, 2010-2017



Source: BART

## Income and Poverty

In addition to providing more employment opportunities, the improving economy has also contributed to higher City revenues. In particular, revenues tied to economic growth – including property, sales, business license, real estate transfer tax, and transient occupancy (hotel) tax revenues – have all increased significantly since the recession. Increasing revenues, combined with cost saving efforts, have enabled the City to invest in additional services for residents. The 2017-19 City budget included allocations for increased police training and oversight; expanded library hours; and additional code compliance officers to enforce against blight, abandoned buildings, and illegal vending as well as allocations to expand the rental housing inspection program. However, City costs – particularly the costs of benefits – continue to increase faster than revenues.

While the city's overall economy has improved significantly, income inequality has risen. This is true at both national and state levels, too. Income inequality increased sharply in California over the past two decades, increasing faster than in the U.S. as a whole. California also has the nation's highest rate of poverty, even without considering the high cost of living. There are also sharp racial disparities: 22% of the state's Black population and 19% of its Latino/a population lived in poverty in 2016, compared to 13% of Whites and 11% of Asians.<sup>4</sup> Oakland has the same significant disparities in income and employment among racial and ethnic groups, as well as among different neighborhoods. For

example, in 2016, approximately 26% of Oakland's Black population, 23% of its Latino/a population, 18% of Asians, and 11% of Whites lived in poverty.<sup>5</sup> As shown below, employment rates also vary by demographic and geography.

Approximately 16% of Oakland families live in poverty – including 24% of families with children – compared to 9% of all families in Alameda County. Despite large swings in other economic indicators in the last five years, the poverty rate has hardly moved. White households have significantly less poverty overall and enjoy nearly double the median household income of most other demographics. (Figures 11 and 12). While Black, Latino/a and Asian unemployment rates have decreased significantly, the median income for these groups shows little change. Overall, Oakland's residents are more likely than other Alameda county residents to work in lower-paid occupations such as food preparation, maintenance, personal care and services, construction, and transportation.

The City's minimum wage law, which went into effect in 2015, benefits many workers in these occupations. The City's analysis estimated that 57,300 Oakland workers, or 27% of the City's employment, were affected by the 2015 minimum wage increase. The new minimum wage is tied to the regional consumer price index and will increase with inflation each year. However, regional analysis (Figure 13) shows that these gains are working against a trend of declining wages for low wage workers.

<sup>4</sup>American Community Survey.

<sup>5</sup>US Census Bureau, 2014 American Community Survey.

<sup>6</sup>Hausrath Economics, "Economic Impact Assessment Of Proposed Minimum Wage Increase In Oakland," July 2014.

Figure 11. Poverty Rate by Race and Ethnicity, 2015

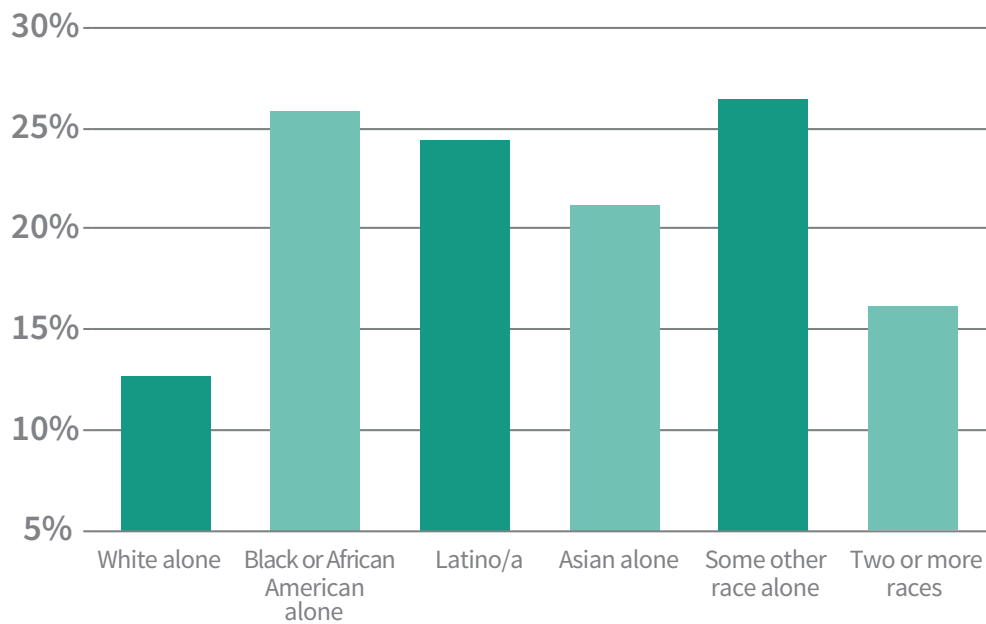
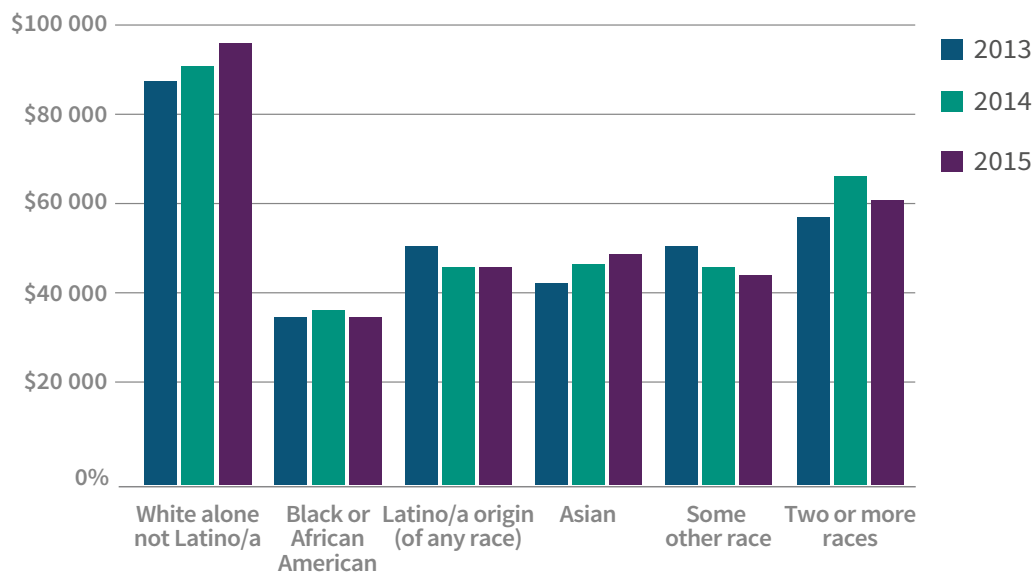


Figure 12. Median Household Income by Race and Ethnicity of Householder, 2013-2015



Sources: US Census Bureau, American Community Survey; City of Oakland,.

## Education and Educational Disparities

Oakland exceeds national levels both for the number of adults with college and post-graduate degrees, and for the number of adults who did not complete high school.<sup>7</sup> In the past decade, Oakland's public schools have made important gains in student achievement. Unfortunately, the number of children meeting key educational milestones still needs improvement, and on most metrics, the achievement gap persists when comparing Black and Latino/a to White and Asian students (Figure 14). While Oakland's graduation rate has improved in recent years to 63%, it still lags behind the average graduation rate of 80% for Alameda County and California.<sup>8</sup> A majority of Oakland's public schools serve students of color and those from socioeconomically disadvantaged or language minority backgrounds and too many Oakland students are not gaining the skills needed for successful employment.<sup>9</sup>

Finally, Oakland also has a large and growing population of formerly incarcerated individuals who are a distinct demographic with barriers to earning potential and employment. Incarceration is both a predictor and a consequence of poverty. Alameda County estimates over 5,000 Oakland residents have a conviction record. People with convictions often carry fee- and fine-related debts while their economic opportunities are diminished and family members are often responsible for the costs of incarceration.<sup>10</sup> Criminal justice reforms, combined with reduced barriers to jobs and housing, may have a significant impact on household earning potential and the demand for City services. Providing opportunities for all Oakland residents to participate in the economy will be key to our success.

<sup>7</sup><http://www.clrsearch.com/Oakland-Demographics/CA/Education-Level-and-Enrollment-Statistics>

<sup>8</sup><http://www.ofcy.org/assets/Uploads/OFCY-Strategic-Plan-2016-2019.pdf>

<sup>9</sup>City of Oakland Resiliency Strategy—Preliminary Assessment.

<sup>10</sup>Saneta deVuono-powell, Chris Schweidler, Alicia Walters, and Azedah Zohrabi. "Who Pays? The True Cost of Incarceration on Families." Oakland, CA: Ella Baker Center, Forward Together, Research Action Design, 2015.

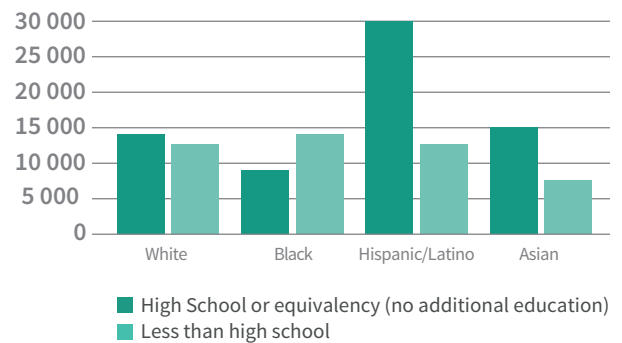


Figure 13: Regional Analysis of Changes in High, Middle, and Low-Wage Employment and Wages



Source: Association of Bay Area Governments from CA Employment Development Department Occupation and Wage data, adjusted for inflation

Figure 14. Educational Attainment by Race or Ethnicity, 2014



Sources: US Census Bureau, 2014 American Community Survey; City of Oakland, 2015.

## Disaster Preparedness and Resilience

The City of Oakland has several ongoing efforts to prepare the city for natural disasters and a changing climate. These include:

- Energy and Climate Action Plan Update
- Soft Story Retrofit Program
- Oakland Resiliency Handbook
- Local Hazard Mitigation Plan
- Green Infrastructure Plan
- Preliminary Sea Level Rise Road Map

These collective efforts help to reduce the city's current and future climate and seismic risks, maximize the value of our infrastructure investments, and provide essential urban greening – all important measures for maintaining the local economy and economic security.

## Appendix B: Summary of Public Outreach and Stakeholder Input

This strategy incorporates significant outreach to City elected officials, staff, and a variety of stakeholders. The Economic Workforce Development Department organized a series of focus groups and interviews that included staff from multiple departments, business owners, the Chamber of Commerce and other civic organizations, educational and health institutions, and state and regional agencies that provide services in Oakland. The focus group participants provided

input on the values and goals that should guide the Strategy, provided feedback on the opportunities and challenges facing Oakland, and suggested ways that EWDD's work plan could be adjusted in order to be more responsive to changing conditions. The Mayor's Office, City Council, and Community & Economic Development Committee also provided input and feedback throughout the process. This appendix provides a summary of feedback from the focus groups and other outreach conducted as part of this process.



# Summary of Recommended City Actions:

## Economic Development Strategy Focus Groups

### Arts

- **Develop a broader Arts vision and adopt a statement** that the City values and encourages the arts
- **Improve property ownership and access to facilities and maker spaces** for artists
  - Develop vacant properties into affordable spaces artists can use
  - Create medium-sized space (smaller than Fox Theater) to accommodate artists
  - Improve marketing of spaces dedicated to art
  - Support innovation around funding for maker spaces, co-ops, big business investment, venture capital, and microloans
- Champion Oakland artists – particularly in public spaces (model: “SF’s Living Innovation Spaces”)
- **Improve permitting / grant-making / insurance processes to be more transparent, consistent, and non-discriminatory** (discrimination relates to difficulty of insuring rap / hip hop events)
- **Develop career development assistance for artists** (perhaps a business assistance center for artists)

- **Collaborate across departments to support artists** (i.e., police & fire departments code inspections can help or hurt artists)
- **Retain industrial or other manufacturing companies** that artists rely upon in the city (flight to Richmond and other cities among metal manufacturers, industrial printers, etc)

### Manufacturing

- **Support the continued growth** of Food production/logistics/support services like packaging—all businesses that thrived during the recession – along the I-880 Corridor
- **Bring new industrial real estate to market**, especially small storage and manufacturing spaces for food production
- **Use flexible Zoning** to support design and manufacturing occurring in a single space.
- **Invest** in high-end dark fiber infrastructure
- **Encourage** food and advanced manufacturing industries to cluster
- **Offer financing** via shared revolving loan funds
- **Invest in training** to supplying the talent for construction and mechanics jobs

## Clean and Green

- **Strengthen workforce development programs** that respond to growing demand for primarily white collar jobs (not blue collar jobs) in the green economy
- **Provide public safety** for the sector by building upon the success of Ambassador's Program in downtown Oakland
- **Foster equity in the sector for low-income residents and people of color**
  - Support urban gardening and forestry projects/organizations
  - Strengthen Green Academies in Oakland Unified School District to encourage local hiring
- **Educate business owners about benefits of participation in clean energy pilot projects** to generate demand for clean & green services (example: International Boulevard Commercial Energy Efficiency pilot)
- **Market** the clean and green sector success story in Oakland to attract new businesses and brokers (particularly around solar)
- **Set up a City of Oakland booth** at the annual InterSolar conference each July
- **Draw new green businesses** by gathering groups to visit clusters of existing businesses

## Small Businesses

**Smooth out City's small business processes – as primary goal:**

- **Improve education and outreach** on how to start a business in Oakland and move additional resources online (interactive flow charts)
- **Assign case managers** for each business or give businesses online accounts in database for City departments to track information and progress
- **Streamline permitting** process and put it online
- **Share more information on Business Service Organization partnerships**, particularly online, and the services they provide by category (first stops, funding, support & technical assistance, assistance finding affordable space, and navigating real estate)
- **Reframe SBA guide language** to take on more encouraging tone about starting a business
- **Coordinate co-location of complementary businesses**

**Incentivize growth of small business sector – as secondary goal:**

- **Provide cash rewards** for reaching a specific milestone
- **Develop a commercial lending system** or utilize HUD section 108 loan guarantee program
- **Show ROI of various economic development incentives** for businesses: loans, grants, staff help, hiring/training

- **Brand start-up sector** to encourage growth in the space: “StartBiz Oakland” and defer start-up obstacles/fees for up to 2 years
- **Develop and tailor incentives to equitably support local, existing businesses** – particularly those in challenging neighborhoods

## Retail

- **Fill retail gap in general merchandise/ comparison goods sectors** that often only locate with each other
- **Communicate Oakland’s appeal to out-of-town directors of real estate** (local directors already understand)
  - more affordable land/leasing rates, local flavor, credible and fair City planning staff, etc.
- **Incentivize Oakland residents to “shop-local” in their own neighborhoods**
- **Address perception that retail projects won’t necessarily come to fruition** due to policy inconsistency
- **Decide if/how Oakland wants to develop retail chains** – different approaches for different neighborhoods
- **Foster vocal community groups to input into retail planning**
- **Encourage impact fee phased implementation**
- **Repurpose more existing buildings,** like CVS on Broadway
- **Bring in a pioneer retail business along**

**International Boulevard** to lead the way and demonstrate the neighborhood’s high potential

- **Ensure that zoning is for retail only (or retail hybrid) in key areas (corners, not mid-block) of underserved areas**
- **Build Building Department capacity and make fees and policies less short-sighted** to facilitate earlier sales tax revenue generation & employee payment
  - Hire additional permit coordinator for large projects
  - Offset “wet weather” moratorium
  - Standardize permitting process to reduce bureaucracy
  - Help retailers better estimate fees they will incur
- **Share retail success stories with other tenants in a given neighborhood**
- **Connect Workforce Development staff with retailer HR staff to enhance hiring**

## Transportation

**Prioritize implementation of Complete Streets & take advantage of paving schedule to redesign and implement them** (Broadway, currently missing bike lanes in areas) in strategic areas at a tipping point

- Invest in 3-4 major streetscape areas, i.e., 14th (West Oakland to Lake Merritt, 73rd to Macarthur & Hwy 13 on ramp, & Broadway from W. Grand to Jack London)

- Continue International Boulevard and Telegraph Avenue re-designs in progress
- Focus on on/off ramps such as Broadway-Jackson for 5th Street exit connection to Alameda & Jack London Square

#### **Re-design key streets to support localized economic development**

- Demonstrate economic impacts in transportation grant applications
- Demonstrate economic impact of bike infrastructure
- Support creation of a Transportation Vision linked to economic development
- **Support freight/port logistics and prioritize well-executed loading zones**
- **Improve streets and public space**
  - **Short term:** Create more plazas out of extra street space leveraging maintenance from community groups & BIDs
  - **Midterm:** Reduce street space to enable private development to sell it to landowners to enlarge development footprint
  - **Long term:** I-980 Freeway becomes available for land development

**Develop Demand Responsive Parking** (working well in Berkeley), pilot program in Montclair. Bill as a customer and business-focused initiative, about access to commercial areas

## **Tech**

### **Generate publicity around competitive advantages that Oakland offers tech sector**

- Highlight lower costs than SF/SV for large tech firms & startups & their employees
- Engage tech companies aligned with socio-political interest in tackling diversity issues
- Promote and feature DevLabs model as a global tech incubator for people of color
- Attend hackathons and Tech Crunch events outside of Oakland to be visible and tell Oakland's story
- Highlight and nurture growing cluster bright spots in EdTech and Solar

### **Generate local supply of tech workers and local demand for tech company services**

- Coordinate closely with OUSD academy to discover new ways of learning and training, especially for minority communities
- Nurture pipeline of coding academies based in Oakland
- Connect tech entrepreneurs to trainings in valuation and equity
- Use RFPs for City work to engage tech services – need for more transparency in contracting to ensure supplier diversity
- Use Google One and Google for Entrepreneurs; City should provide open data and ask for help with specific problems it faces or that NGOs are facing



- Encourage large tech firms supplier/vendor relationships with local, minority-owned biz's

### Improve enabling environment for tech sector

- Explore broadband infrastructure access and appoint leader to ensure its development
- Offer more Class A space that doesn't need major upgrades
- Address prevalence of crime and blight
- Address weaknesses of Oakland public school system that prevent families from moving here
- Start Oakland-based VC fund
- Explore non-VC funding for mission-based companies (i.e: Community Banks)

### Oakland's Regional Role

- **Leverage Oakland's competitive advantages in the region** (availability of space, strong artistic and urban culture, affordability relative to other regional cities, diversity & integration, good transportation, "hipness," Port of Oakland & industrial space, robust small business and start-up sector, growing energy/green growth sector, presence of UC as an investor with an endowment)

- **Utilize impact fees** – developers willing to pay, but more clarity needed on how process works in Oakland

- **Strengthen global strategy around airport, port, and foreign trade zone development**

- **Support building and modernization of manufacturing/industrial facilities** to reduce flight of companies to other cities, and to support large manufacturing (blue collar) talent base currently in Oakland in need of middle-wage jobs

- **Develop workforce pipeline for white collar professional and administrative staff;** training is currently focused on other sectors

- **Prioritize investment in East Oakland, especially in business community/commercial corridors there** (will have regional impact) & **consider incentives for businesses to locate outside of downtown**

- **Support formation of complementary clusters of businesses**

- **Engage in regional goods movement planning** (especially re: clean tech, which plays big role in Oakland)

## Equity

- **Target federal, state, and local resources to geographic areas that are most vulnerable** (double digit employment zip codes, high truancy rates, high blight rates)
  - Ex: Cap & Trade revenue + other future revenue sources such as a transportation tax
- **Take a systems approach to equitable growth:** must define a vision in terms of what type of economic growth Oakland wants. Then take a holistic approach using multi-pronged, coordinated interventions around workforce development, affordable housing, economic development etc. Oakland Army Base as positive model (transport + job creation).
- **Similarly, create explicit links between equity planning strategies that are interrelated** (i.e.; Housing Equity Roadmap should be referenced in Economic Development Strategy).
- **Ensure that job quality & job access standards are included in every foundation grant**
- **Ensure that neighborhood stabilization is prioritized (residential & business) as a prerequisite to equitable growth** (ie: tenant protection)
- **Promote economic benefits for B-Corps** by exploring models of community benefits that increase social impact of companies. (Emeryville requires tenants to provide in-kind services to schools for a break on rent)
- **Foster community engagement (procedural justice) in projects Oakland has begun and needs to finish** (International Blvd, East Oakland, San Pablo). Oakland Sustainable Neighborhoods Initiative as positive model w/ community land trusts.
- **Create a learning environment to test best practices in equitable growth** in which we can more deliberately try out models in single neighborhoods to figure out what works
- **Explore innovative models for sustaining/growing businesses with local ownership** (employee stock ownership, resident ownership models, direct resident investment in local businesses)
- **Ensure low-income residents & people of color have access to workforce development training linked to actual jobs in fastest growing sectors** (tech, green space); take proactive approach to predicting needs in these sectors

## Resiliency

The international 100 Resilient Cities program goals include “Foster Economic Prosperity” and “Support Livelihoods & Employment.” Locally, public stakeholders in Oakland’s Resiliency planning process, supported by the Resiliency Task Force, an interdepartmental team of City staff, selected economic development and security as one of the top issues the City should address.

The Resiliency Playbook states as its goal: “Oakland will enable all residents to be economically secure, build wealth, and achieve their full potential, regardless of race or means. Oakland seeks to build a model of responsible economic growth and business attraction, in concert with a commitment to building economic security, especially for those who have historically had limited access to opportunity.” The Playbook recommends the following actions:

- **Support asset building** for low-income parents and children through Oakland Promise College Savings Initiatives
- **Create pathways to career success** for young men and women of color
- **Design a suite of inclusive economic development services** to help entrepreneurs of color gain equal footing in Oakland’s economy
- Align economic resilience goals with the **Oakland Thrives** wealth impact table

In addition, the Resiliency Task Force highlighted the need for affordable housing and floated the idea of business support for landlords and property managers in order to achieve the City’s housing goals.

## Additional Public forums on Economic Development

### SpeakUp Oakland Forum<sup>1</sup>

- Return to **Community Development Block Grant Boards** which kept the City connected and aware of issues affecting every Oakland community
- Implement a program that provides tools and opportunities for local companies **that make products in Oakland**
- Renovate the Henry J. Kaiser Convention Center/Calvin Simmons Theater
- Regulate and tax illegal activities
- Create a clear development **vision** for Oakland that connects its neighborhoods. Recognize the vibrant arts community, give better opportunities and cheaper space to the growing small/micro business community
- Bring **entrepreneurship training programs** and support services to Oakland
- Create a **protected bike path** connecting Lake Merritt, Jack London Square, and West Oakland
- Use a **marketing campaign** to change the perception of Oakland
- Use **community development incentives** to help sustain existing **locally owned business** and to invest in expansion as well as create compliments to existing locally owned business. For instance, if there is a coffee shop, fund an ice cream store next door
- Use **wage and employment incentives** to make it possible for the least advantaged residents be to increase contribution to local economy.
- Support organizations that **provide technical assistance to worker-owned businesses** and sucession planning for retiring business owners.
- Increase **residential densities** and **reduce parking** to increase demand for local services

### East Oakland Listening Session<sup>2</sup>

- Invest in East Oakland **entrepreneurs, brick & mortar businesses, and infrastructure** at a comparable scale to the public investment in Downtown and Lake Merritt
  - Desired business types include pharmacies, health & wellness, academic services, banks & credit unions, spaces for students and people in recovery
- Illuminate City of Oakland **Planning and Economic Development processes and programs affecting commercial corridors** to explain why some commercial corridors are unorganized or failing.
- Increase **education and training resources**

- **Improve diversity in hiring**, including at public schools
- **Remove barriers** to hiring and address discrimination for re-entry population
- **Support development of co-ops and resource sharing**, including public education on investment and credit repair
- **Enable community-led** purchasing and redevelopment of vacant parcels
- **Establish land trusts**
- **Stop high rent increases, absentee landlords, and homelessness**, which affect student truancy
- **Increase homeownership**, including through downpayment assistance, job security, improving credit, and increased awareness of existing services
- **Reduce Real Estate speculation** and vacant properties
- **Eliminate illegal dumping** and improve City communications around blight
- **Fund community ambassadors** to keep streets clean.
- **Use youth program funding** to train the next generation of Oakland workers and residents
- **Be vigilant** about program implementation

## West Oakland Commerce Association<sup>3</sup>

- **Assign more** dedicated business development staff to be on the street
- **Emphasize retention** of light industrial businesses, especially those offering good career pathways to non-college graduates
- **Understand Regional obligations and relationships**
- **Separate** Custom Manufacturing from Food Production as a distinct sector
- **Improve processes** for opening a business and interdepartment coordination
- **Resolve infrastructure and blight** issues in order to allow business communities to thrive and to attract new businesses
- **Consider a commission or other ongoing body** that can elevate business issues and the conversation around economic development
- **Value** the industrial businesses for their contributions to the local economy
- **Provide code enforcement** around vacant properties
- **Be flexible and offer lien forgiveness** for property owners willing to work with the City and community to develop buildings consistent with the established vision

<sup>1</sup>[speakupoakland.org/projects/economic-development-strategy](http://speakupoakland.org/projects/economic-development-strategy)

<sup>2</sup>[www.eastoaklandcollective.com/](http://www.eastoaklandcollective.com/)

## Workforce Development Board<sup>3</sup>

- **Explore and develop incentives, systems and tools** that encourage Oakland-based businesses to hire local residents.
- **Coordinate** outreach, marketing and communications strategies among business service providers to minimize duplication of efforts and enhance community impact.
- **Develop and/or strengthen** programs, services, and initiatives that meet the workforce development needs of **historically underserved populations** who need more assistance with accessing quality jobs.
- **Strengthen and expand work-based learning opportunities for youth** and young adults in the City Of Oakland, with particular emphasis on summer employment.
- **Link, align, and leverage public, private, and philanthropic resources and investments** to strengthen the ecosystem of public, private, and community-based organizations supporting workforce development in the City Of Oakland.
- **Consider examples from other Cities**, such as subsidized or free space to businesses in areas where the City wants to generate economic activity.
- **Maintain affordable commercial rents** for nonprofits who supplement or provide essential social services.
- **Study poverty in Oakland** to better understand what policies will effect reduction.

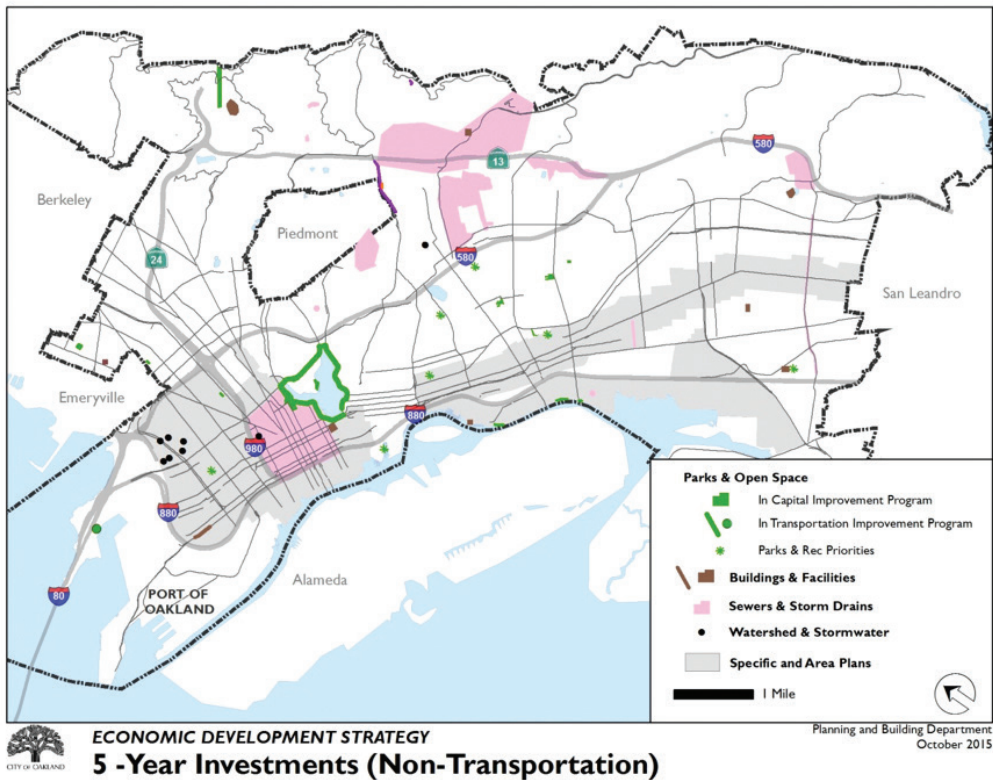
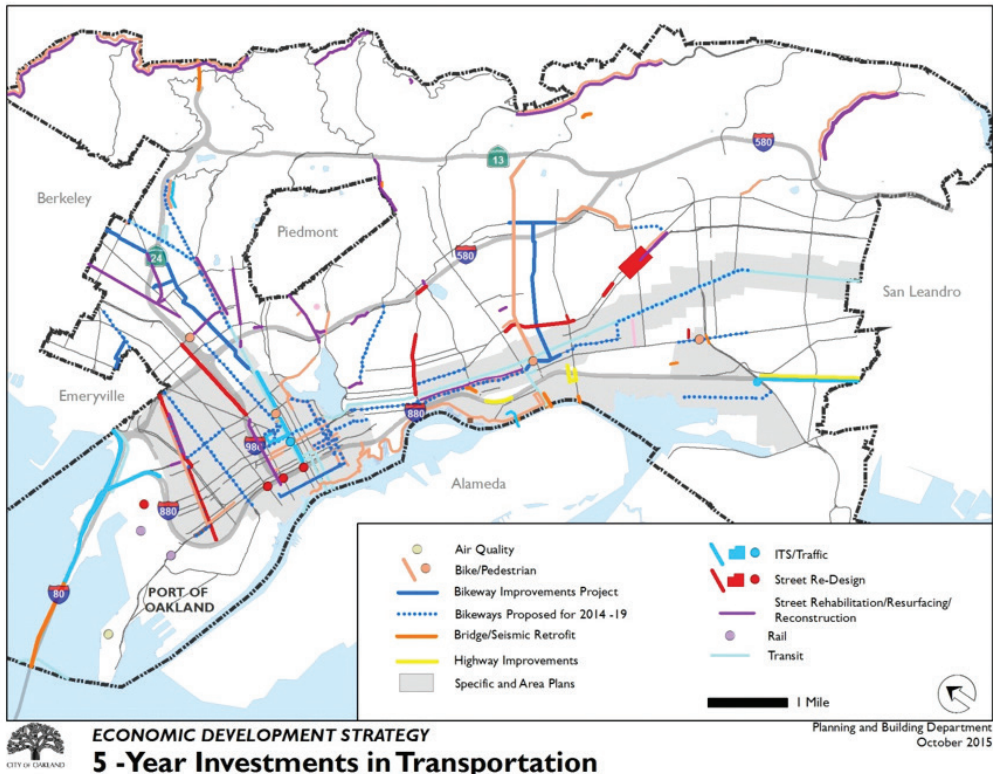


# Appendix C: Document Review and Investment map

Oakland has laid extensive groundwork for interdepartmental coordination and identifying catalytic investments through six recent Specific Plans and the International Boulevard Transit-Oriented Development Plan. The plans create a regulatory framework for new development, and identify investments needed to improve local infrastructure and public space, physical appearance, and safety. Many of the plans also have an explicit focus on equitable access to transportation and jobs, and on providing improved infrastructure and other community benefits for low-income residents and people of color. The Strategy provides direction to achieve some of those goals. Capital investments planned for the next five years will help implement the Specific Plans and bring additional transportation, parks and open space, and utility improvements to Oakland's neighborhoods.

**Map 4** shows public infrastructure investments in streets, parks, buildings, and sewer and storm drains planned for the next five years, which is the intended time frame for the Strategy. Many of these investments represent opportunities for business engagement around street redesigns. The most significant, the construction of Bus Rapid Transit on International Boulevard, includes extensive community involvement and has business engagement and arts programming and placemaking underway. The successful completion of this project is an economic development priority and a potential model for other corridors.

Map 4. Five-Year Investments: Capital Investments Planned by the City of Oakland, 2014-2019 – Transportation and Non-Transportation (Parks, Buildings, Sewers & Watersheds)



## Documents Reviewed

As part of the development of the Oakland Economic Development Strategy, Strategic Economics reviewed previous citywide economic development strategies, land use plans, and other relevant documents. These included the six economic and workforce development strategies that the City of Oakland and/or local

civic organizations have sponsored since the late 1990s; the City's six area plans; and other citywide plans and documents, including the General Plan Land Use and Transportation Element, the Oakland Redevelopment Agency Successor Agency's Long-Range Property Management Plan, and the Climate Action Plan.

Figure 15. Strategies and Plans Reviewed

Plan	Date Completed/ Adopted	Sponsor / Author
<b>Citywide ED Strategies</b>		
Forging An Economic Development Strategy For The City Of Oakland	1997	Claggett Wolfe Associates for the City of Oakland
Oakland Moving Forward	2006	Community Task Force Report on Economic Development for the Dellums Task Force
Taking Stock of Oakland's Economy	2007	McKinsey & Company for the Oakland Metropolitan Chamber of Commerce
A Collaborative Economic Development Strategy for Oakland	2008	Oakland Partnership (collaboration of City & Chamber of Commerce)
Retail Enhancement Strategy	2008	Conley Consulting Group
Staff Cluster Analysis and Strategy Outline (Draft)	2013	Economic Development staff
<b>Workforce Strategies</b>		
Workforce Investment Board Strategic Plan 2013-2017	2013	Oakland Workforce Investment Board
<b>Area Plans</b>		
International Boulevard TOD Plan	2011	City of Oakland
Central Estuary Area Specific Plan	2013	City of Oakland
West Oakland Specific Plan	2014	City of Oakland
Broadway Valdez District Specific Plan	2014	City of Oakland
Lake Merritt Station Area Specific Plan	2015	City of Oakland
Coliseum Area ("Coliseum City") Specific Plan	2015	City of Oakland
<b>Other Plans</b>		
General Plan Land Use and Transportation Element	1998	City of Oakland
Climate Action Plan	2012	City of Oakland
Long-Range Property Management Plan	2014	Oakland Redevelopment Successor Agency

## Key Findings

Several conclusions emerged from the document review:

- **The City of Oakland has not adopted a formal economic development strategy since 1997.** Although subsequent efforts have involved participation from City staff, they have been driven by outside organizations including Mayor-elect Ron Dellum's transition team (2006) and the Chamber of Commerce (2007 and 2008). Economic development staff began drafting a strategy outline in 2013, but this effort was not completed.
- **Previous economic and workforce development strategies have identified a similar set of sectors for business retention and attraction efforts.** Figure 16 shows the sectors targeted in each of the economic and workforce development strategies. Sectors mentioned in most or all of the strategies are in bold. Common sectors include health care; international trade, transportation, and logistics; food manufacturing; green technology; the creative arts; and digital arts and media. In general, most previous economic development strategies have selected target sectors based on the potential to drive job growth, without considering how those potential jobs fit the education and skill levels of Oakland's existing workforce. However, the 2013 Workforce Investment Board Strategic Plan began to link target sectors with specific workforce training needs. The current effort to create an Economic Development Strategy represents an opportunity to build on the 2013 plan and improve the link between economic and workforce development activities.
- **Previous strategies have involved limited outreach to stakeholders.** Instead, most of the strategies have focused on analyzing employment trends in order to identify which sectors drive Oakland's economy. While understanding the sectoral mix of Oakland's economy is important, outreach to stakeholders is critical to evaluating the strengths and weaknesses of existing economic development programs, identifying specific challenges to economic development, and determining how the City should prioritize its economic development efforts moving forward.
- **The implementation sections of the previous economic development strategies have generally emphasized improving processes and coordination, rather than creating a concrete framework for specific economic development initiatives.** Most of the strategies have focused on increasing coordination across City departments and with other organizations in order to create a better business climate. In contrast, the Economic Development Strategy now under development will create a more specific framework to help economic development staff organize their work plans over the next five years.

- In recent years, the City's focus has shifted to implementing specific plans in West Oakland, the Broadway/Valdez District, Lake Merritt, the Central Estuary, and the Coliseum Area. International Boulevard has also emerged as a priority for implementing transit-oriented development around the proposed bus rapid transit (BRT) stations. The City is currently creating a Downtown Specific Plan and an Equitable Development Strategy.
- **If implemented as planned, the Specific Plans will accommodate more than three-quarters of the City's future projected job growth.** Figure 17 shows the non-residential development and associated employment gains projected for each of the five specific plan areas. In total, the West Oakland, the Broadway Valdez, Lake Merritt, and Coliseum specific plan areas <sup>4</sup> are projected to accommodate more than 50,000 new jobs over the time horizon of the plans, or more than 75 percent of the approximately 65,000 net new jobs that ABAG projects the City of Oakland will attract between 2015 and 2014.<sup>5</sup>
- Successful implementation of the specific plans will require significant involvement from economic development staff; however, prioritizing implementation actions will require ongoing coordination with other City departments. Figure 18 summarizes some of the key implementation actions mentioned in each of the five specific plans and the International Boulevard TOD Plan. The implementation sections vary significantly in level of detail and the extent to which they assign responsibilities to individual departments or specify time frames for implementing specific actions.

<sup>4</sup> The Central Estuary specific plan does not include employment projections.

<sup>5</sup> Association of Bay Area Governments, 2013.

Figure 16. Sectors Targeted in Previous Economic and Workforce Development Strategies

Plan	Date	Target Sectors
Forging An Economic Development Strategy For The Target Industries/Clusters City Of Oakland	1997	Existing: Business Services, Health Services, Printing and Publishing, Transportation, Recreation, Arts, Entertainment, Food Processing (Manufacturing)  Emerging: Software and Multimedia, Environmental Technology, Bioscience/Biotechnology, Telecommunications
Oakland Moving Forward	2006	Arts, Green Economy, Small Business
Taking Stock of Oakland's Economy	2007	Existing: Health care/Bio Tech; International Trade and Logistics; Downtown  Emerging: Green Industry; Arts, Design, and Digital media; Food Manufacturing
A Collaborative Economic Development Strategy for Oakland	2008	International Trade and Logistics; Health Care and Life Sciences; Green Technology; Creative Arts
Oakland Workforce Investment Board Strategic Plan 2013-2017	2013	Health Care; Construction; Transportation, Distribution and Logistics; Digital Arts and Media; Retail; Manufacturing, including Food Production and Distribution; Green Industries
Staff Draft ED Strategy	2013	Food and Beverage; Health Care, Health Technology and Wellness; Green/Clean Technology; Creative Industries; International Trade, Logistics, and Warehousing

Figure 17. Specific Plan Development Projections: Non-Residential Space and Employment

Plan	West Oakland	Broadway Valdez District	Lake Merritt Station Area	Central Estuary Area	Coliseum AreaV
<b>Plan Area (Acres)</b>	400	95	280	420	800
<b>Non-Residential Space (Millions of Sq. Ft.)</b>					
Existing	7.8	2.1	5.4	5.2	7.8
Net New (Build Out)	4-5	1.8	1.6	10	12
Percent Change	51%-64%	86%	30%	192%	154%
<b>Employment</b>					
Existing	15,890*	7,620	17,800	N/A	N/A
Net New (Build Out)	22,000	4,100	4,100	N/A	20,000
Percent Change	138%	54%	23%	N/A	N/A

\* Includes specific locations identified as "Opportunity Areas" only.

Sources: City of Oakland, Specific Plans and Environmental Review documents; Strategic Economics, 2014.

Figure 18. Strategies and Plans Reviewed

Plan	Major Implementation Actions
West Oakland	<ul style="list-style-type: none"> <li>• Regulatory changes</li> <li>• Address blight, crime, safety concerns, basic infrastructure needs</li> <li>• Economic development</li> <li>• Longer-term transportation, open space, and other infrastructure improve</li> </ul>
Broadway Valdez District	<ul style="list-style-type: none"> <li>• Regulatory changes</li> <li>• Continue marketing, coordination, and developer outreach to attract retail</li> <li>• Pursue strategic land acquisition and disposition</li> <li>• Provide public funding for structured retail parking, prioritized list of public realm improvements</li> <li>• Establish CBD</li> <li>• Develop citywide strategy for auto-related retail; relocate active dealerships from Valdez Triangle as needed</li> </ul>
Lake Merritt Station Area	<ul style="list-style-type: none"> <li>• Regulatory changes</li> <li>• Infrastructure and public space improvements (including BART station access)</li> <li>• Job training, local hire</li> <li>• Cultural preservation and vitality – e.g., public art, historical markers</li> <li>• Community facilities rehab – Lincoln Recreation Center, Henry J. Kaiser Convention Center, Fire Alarm Building</li> </ul>
Central Estuary Area	<ul style="list-style-type: none"> <li>• Regulatory changes</li> <li>• Transportation investments</li> </ul>
Coliseum Area ("Coliseum City")	<ul style="list-style-type: none"> <li>• Regulatory changes</li> <li>• Negotiations among developers, sports teams, public land owners (City, County, BART, Port)</li> <li>• Infrastructure and Pre-Development Improvements (\$236 million)</li> </ul>
International Boulevard	<ul style="list-style-type: none"> <li>• Continue planning for and facilitating TOD</li> <li>• Increase public resources to address crime</li> <li>• Invest in improvements to improve physical appearance, pedestrian environment, transit access, bicycle network</li> <li>• Prepare an EIR for the plan</li> <li>• Create a comprehensive approach to managing parking and traffic</li> <li>• Build partnerships</li> </ul>