

LOS ANGELES' INDUSTRIAL LAND: SUSTAINING A DYNAMIC CITY ECONOMY

PREPARED BY THE DEPARTMENT OF CITY PLANNING AND THE COMMUNITY REDEVELOPMENT AGENCY
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Contents

INTRODUCTION AND BACKGROUND	3
I. INDUSTRIAL LAND AND ZONING IN LOS ANGELES	7
Industrial Zones and the Industrial Sector	7
Industrial Land Supply in Los Angeles	10
Evolving Industrial Districts	11
Strategic Importance of Downtown Los Angeles	12
Land for Emerging Industry Sectors	13
II. THE IMPORTANCE OF INDUSTRIAL LAND TO THE LOS ANGELES ECONOMY.....	15
Los Angeles' Industrial Workforce.....	15
“Ripple Effects” to the Los Angeles Economy	18
III. REAL ESTATE ECONOMICS SHAPING INDUSTRIAL LAND USES IN LOS ANGELES	20
Current Industrial Demand and Vacancy Rates.....	20
Demand for Housing in Industrial Districts	22
Opportunities for Housing Development Throughout Los Angeles	23
Economic Impact of Conversion to Housing on the City’s General Fund.....	24
Impacts of Industrial-to-Residential Conversion on the City’s Long Term Development	25
CONCLUSION.....	28
Appendix 1.....	29
METHODOLOGY / ANALYSIS FRAMEWORK.....	29
Appendix 2.....	33
General Plan Excerpts.....	33
Appendix 3.....	40
Other Existing Policies that Shape Industrial Districts.....	40
Appendix 4a.....	42
Other Cities’ Industrial Land Use Policies.....	42
BIBLIOGRAPHY.....	52
ACKNOWLEDGEMENTS	54

INTRODUCTION AND BACKGROUND

Job producing land is a critical component of a healthy and prosperous city. Industrial zoned areas of Los Angeles offer employment opportunities for residents of all skill and education levels, create and support jobs in multiple other business sectors, and generate taxes that sustain the quality of life elsewhere in the City by funding streets and sidewalks, police and fire services, libraries, trash collection, and more. For these reasons, the City of Los Angeles has had a long-standing adopted policy to preserve industrial lands. The General Plan Framework states that the City of Los Angeles must **“actively ensure that the City has sufficient quantities of land suitable to accommodate existing, new and relocating industrial firms.”** It also limits the conversion of existing industrial land to other land uses to avoid creating **“a fragmented pattern of development [that] reduces the integrity and viability of existing industrial areas.”**¹

**CITY OF LOS ANGELES GENERAL PLAN
FRAMEWORK LAND USE GOAL:**

“Industrial growth that provides job opportunities for the City's residents and maintains the City's fiscal viability.”

This existing policy states the City's intent to:

- Protect industrial zoned land;
- Retain and expand existing businesses;
- Attract new uses that provide job opportunities for the City's residents; and
- Maintain a healthy jobs/household ratio that supports the General Fund and its capacity to pay for essential services and programs for the City's existing and future population.

Despite this long-standing policy to support industrial and employment generating land uses, the policy has been increasingly overlooked, recently prompting a renewed effort to retain critical job-producing lands, the jobs they support, and the revenues they generate for the City. The industrial sector in Los Angeles employs fully one-quarter of the City's total workforce² and creates an estimated \$219,000,000 annually in City tax revenue. More than 410,000 persons are employed in the industrial sector.³

The diverse and dynamic economy of Los Angeles is increasingly home to many types of 'new economy' jobs that are considered industrial. Technological advances and global economic changes are replacing 'smokestack' industries with more light manufacturing, apparel, biomedical, logistics

¹ General Plan Framework, Section 7.2.11 (1996, 2001).

² California Employment Development Dept., Labor Market Information Division, ES202 data (2005).

³ This number represents persons working in the City of Los Angeles, irrespective of place of residence.

and creative industries. Moreover, Los Angeles provides opportunities for start up businesses; industrial zones offer the conditions needed for entrepreneurs and small businesses to grow and expand, as well as transition to full production.

In addition to directly supporting job-producing uses, industrial zoned land is crucial to many services essential to Los Angeles' business and residential communities including utilities, distribution, recycling, construction and maintenance yards, animal services, and automobile repair. These businesses are also critically linked to other business sectors that rely on goods and services produced in industrial zones.

Competition for industrially zoned land in Los Angeles is extremely high; industrial land in the City has the lowest vacancy rate in the nation, remaining consistently below two percent. Yet the supply of these critical job-producing areas is becoming increasingly scarce as non-industrial uses such as residential, big-box retail, schools, open space and recreational facilities continue to encroach on industrial land. Currently, **26 percent of Los Angeles' industrial land is already used for non-industrial purposes**⁴, leaving just six (6) percent of the City's total land area available for active industrial uses. In Downtown Los Angeles, West Los Angeles and increasingly in Hollywood, residential developers have purchased industrial properties to convert them to high-end housing, creating speculative markets that result in increasing land prices and uncertainty about future land use decisions, making it difficult for our most important industries to do business in Los Angeles and for new industries to have the confidence to invest. As a recent market report forecasting the fate of industrial land in Los Angeles cautions:

*"The major concern is what the developers will do with the minimal vacant land that is left in Los Angeles County. Developers of all types of product: residential, retail, office and industrial, will all scramble to gobble up land and turn it into what they believe will be the most profitable use. The recent trend in Los Angeles has been mixed-use and high-end condominium construction. If this trend continues, industrial space will be in even tighter demand, pushing more users in the area to move east [to the Inland Empire]."*⁵

When industrial businesses and jobs leave the City, it not only redirects economic value and revenues to other cities, it potentially leaves Los Angeles residents with fewer—and often lower-paying—employment opportunities. To protect job-producing land in the City of Los Angeles, the Mayor's Office of Economic Development appointed an Industrial Development Advisory Committee in 2003 to make policy recommendations to the Mayor and City Council to help the City:

⁴ Not including the Airport and Port of Los Angeles. DCP GIS (2004).

⁵ Grubb & Ellis, *Industrial Market Trends: Los Angeles County* (Second Quarter 2007).

- Encourage industrial economic activity in the City of Los Angeles;
- Retain and optimize the use of the City's industrial zoned land;
- Increase the number of quality jobs available to local residents; and
- Increase the City's revenues from industrial activity.

The Committee issued the *Industrial Development Policy Initiative* Phase 1 in early 2004 and Phase 2 in late 2005. These reports characterized Los Angeles' industrial base, examined the factors that influence the vitality of the industrial sector, and made preliminary policy recommendations to expand the City's industrial base. Both the 2004 and 2005 reports underscore the significance of the City's industrial land use policies to the City's economic prosperity.

As the public bodies responsible for implementing City land use policy, the Los Angeles Department of City Planning (DCP) and the Community Redevelopment Agency of the City of Los Angeles (CRA/LA) have an obligation to ensure an adequate supply of land for existing businesses to operate and to employ the City's residents, as well as to enhance the City's ability to foster business and job growth.

By 2005, Los Angeles was experiencing intense pressure to convert relatively inexpensive industrial land to other uses including residential development and public and private schools. As a result, the Mayor directed DCP and CRA/LA to look more deeply into the ramifications of the potential loss of the City's industrial areas. The Industrial Land Use Policy (ILUP) Project was thus undertaken to:

- Address the increasing numbers of zone change, general plan amendment and redevelopment plan variation applications to convert industrial land to other uses; and
- Evaluate the efficacy of the City's existing industrial land use policy in order to provide guidance to DCP and CRA/LA staff as they begin updating the Community Plans and related documents that include many of the City's industrial/employment districts.

The ILUP Project staff released preliminary findings and conclusions in November 2006, which were presented to community members, residents, business owners, developers, advocacy groups, and City staff, for review and comment over a period of six months. ILUP Project staff subsequently conducted additional analysis to address issues raised by the various groups and revised the preliminary determinations.

This report is the culmination of ILUP Project research, analysis and public outreach. It is submitted in conjunction with industrial land use policy implementation directions to DCP and CRA/LA staff.

The directions include both typological and geographically-specific staff guidance that together with this report provide policymakers and the public with a comprehensive understanding of the role of industrial and employment lands in the City of Los Angeles and why they are important to the social and economic health of the City. While its scope is Citywide, this report emphasizes conditions in Greater Downtown Los Angeles where the most acute land use conflicts are occurring, and thus where the most attention has been focused.

This report is organized into five sections:

- I. ***Industrial Land and Zoning in Los Angeles*** reviews types of industrial uses in Los Angeles and policy/planning efforts that shape these uses;
- II. ***The Importance of Industrial Land to the Los Angeles Economy*** reviews wage levels, demographics and workforce development issues related to industrial uses;
- III. ***Real Estate Economics Shaping Industrial Land Uses in Los Angeles*** reviews current industrial demand and vacancy rates, impacts of demand for housing in industrial districts, and discusses the opportunities for housing development throughout Los Angeles;
- IV. ***Conclusion*** summarizes and concludes report findings; and
- V. ***Appendices*** include a summary of the methodology and analysis used in the review of the City's existing industrial lands, excerpts from the General Plan Framework Element, brief descriptions of existing City policies that affect industrial land, and an overview of other cities' strategies for preserving and enhancing industrial districts.

I. INDUSTRIAL LAND AND ZONING IN LOS ANGELES

Zoning is important for the separation of land uses as well as to ensure that an adequate supply of land is available for current and future development. Zoning is based on comprehensive planning for the entire City to ensure that there is a balance of space to house and employ City residents and to support the services that meet both residential and non-residential needs. The distribution and organization of zones reflect the designation of land use categories in the General Plan Land Use Element and Community Plans. This allocation is intended to ensure that development is consistent with adopted plans and that development does not adversely affect the City's fiscal health or environmental resources. While it is possible to apply to the City Council for a change of zone for any particular parcel in the City, the intent of the Community Plans is to create rational land use and zoning designations and to discourage incompatible or inappropriate development, i.e., "spot zoning."

In Los Angeles there are four primary zoning categories—residential, commercial, industrial, and public facilities—with each category divided into more specific zones to allow for variation in intensity and mix of uses. The separation of uses is intended to protect sensitive uses such as homes and schools from noise and traffic, and allows commercial and industrial districts to exist without restrictions that could hinder business operations.

ZONING 101

All private and public land in a city is designated for a particular type of use; this separation of uses is commonly referred to as zoning. Zoning is the tool used to implement broad policies related to land development in the city. Zoning allows certain uses to be located on particular parcels while restricting other uses. For instance, single family residential zones typically do not allow commercial uses such as shopping malls and offices, or industrial uses such as recycling yards or auto repair shops.

Industrial zones prohibit uses such as housing and hospitals because of the potential for environmental and health conflicts. It would be inappropriate, for instance, to have a residence, school or hospital next to a noisy or noxious manufacturing plant.

Industrial Zones and the Industrial Sector

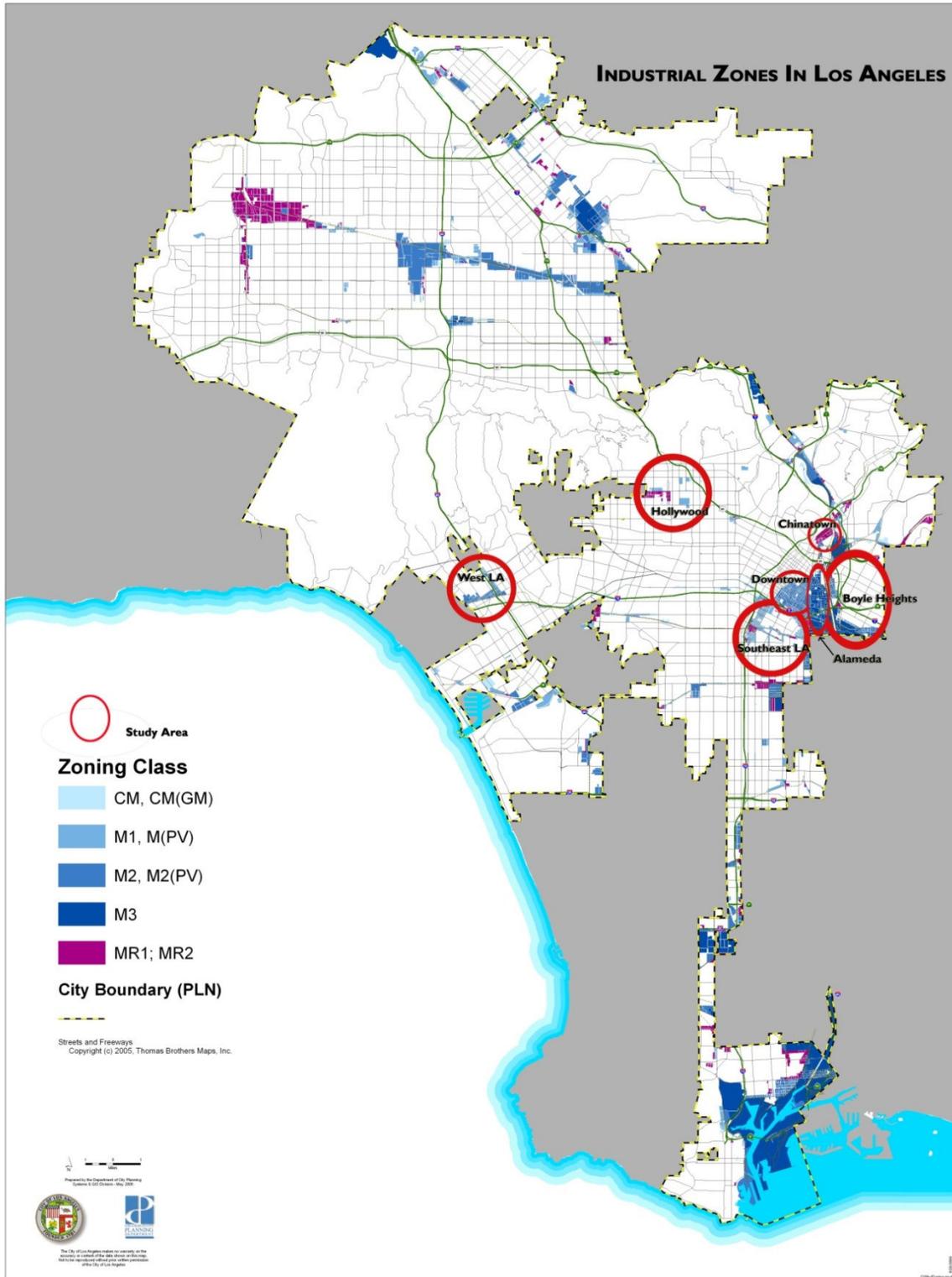
The Industrial sector represents a portion of the economy that includes manufacturing, warehousing, transportation, wholesale trade, publishing, logistics and motion picture production. Most of the activities that support these industries occur within industrial zones. For simplicity it is useful to classify businesses or uses into three main categories:

- **Heavy Industry** describes the most intensive industrial uses, such as large-scale manufacturing operations, aerospace, transportation and logistics, refineries, scrap metal facilities, produce storage and distribution, and similar uses whose impact on adjacent land may be significant and noxious or noisy.⁶
- Lower-impact uses fit into the category of **Light Industry**. These include clothing design and manufacturing, furniture design and manufacturing, packaging and assembly, warehouse/distribution, biomedical research/manufacturing, and wholesale sales. Light industry also includes a variety of “neighborhood industrial services” that benefit from the close geographic relationship to customers, wholesalers and related services. Such uses include animal hospitals and kennels, automobile service and painting, lumber yards and specialty construction materials.
- **Studio & Production** uses are especially important to the Los Angeles economy. These types of uses often require specialized buildings that provide high ceilings, wide clearances and extensive power infrastructure but do not produce many of the nuisances of some other industrial uses. Common activities in this category range from film and television production campuses with sound studios, lumber yards and prop houses, to digital sound studios and graphic production offices. These types of uses—while not noxious—may still produce limited impacts due to extended hours of operation and/or deliveries. They frequently locate in districts in close proximity to related industrial and commercial businesses in order to maximize the synergy and interdependence these uses have with each other and with suppliers, clients, and related independent contractors.

These categories correspond roughly to industrial zoning, which is separated into zones from heaviest (M3, M2) to lightest (M1, MR and CM) intensity. Heavy industry and uses that produce noise, odors or other environmental impacts are typically separated from other uses that produce fewer impacts, including light industrial uses. Figure 1 illustrates the distribution of industrial zones in Los Angeles.

⁶ Port and airport activities are considered heavy industry, but this report excludes these from the discussion due to their specialized needs and operating requirements.

FIGURE 1: INDUSTRIAL ZONED LAND IN LOS ANGELES



Industrial Land Supply in Los Angeles

Just eight percent of the City of Los Angeles (excluding the Port of Los Angeles and LAX) is zoned for industrial use—about 19,000 acres. These 19,000 acres are the only parts of the City where industrial and other high-impact uses may locate. Of this total area, 26 percent is already used for non-industrial purposes including residential, retail and institutional uses (see Table 1).

TABLE 1: TYPES OF USES IN LOS ANGELES' INDUSTRIAL ZONES

<i>Type</i>	<i>Total Acres</i>	<i>% of Total</i>
Light Manufacturing	5,349	28.1
Other Industrial Uses*	3,991	21.2
Warehousing	2,222	11.7
<i>Institutional</i>	<i>1,906</i>	<i>10</i>
<i>Retail</i>	<i>1,550</i>	<i>8.1</i>
Heavy Manufacturing	1,380	7.3
<i>Residential</i>	<i>778</i>	<i>4.1</i>
<i>Commercial</i>	<i>615</i>	<i>3.2</i>
Misc. and Unknown	525	2.8
Food Process Plants	279	1.5
Open Storage	267	1.3
Film & TV Production	110	0.5
<i>Recreational</i>	<i>74</i>	<i>0.4</i>
Industrial Uses	14,123	74%
<i>Non-industrial Uses</i>	<i>4,923</i>	<i>26%</i>
TOTAL	19,046	100%

**includes Mineral Processing, Oil and Gas, Lumber, Airport and Port of LA uses (not the actual Port and LAX), City Landfills, and Parking Lots.*

Source: IDPI Phase 1 Report 2004, page 74

Although certain uses are prohibited in industrial areas, the City of Los Angeles' zoning code is permissive, meaning that the code allows certain non-industrial uses—retail stores, offices, animal clinics/kennels, gas stations, and auto sales, most of which are allowed in commercial zones—in industrial zones. So even without industrial conversions or zone change applications, industrial districts are subject to being compromised by the presence of such uses.

In addition to the competition that industrial zoned land experiences due to the variety of uses allowed, discretionary actions by decision-makers have also contributed to the diminishing supply of land for industrial and employment uses. The General Plan Framework makes it clear that conversions to non-industrial uses should only be allowed “where it can be demonstrated that the reduction of industrial lands will not adversely impact the City's ability to accommodate sufficient industrial uses to provide jobs for the City's residents or incur adverse fiscal impacts.”⁷ Approving conversions of industrial parcels on a project-by-project basis without regard to the broader citywide context, coupled with Los Angeles' permissive zoning code, has diminished the availability of the City's industrial lands along with the jobs, industries, and General Fund revenues they support.

Evolving Industrial Districts

The term “industrial” no longer only refers to large factories producing steel, cars or other mass produced goods. Today the term describes a broader array of job-producing uses and activities—in addition to traditional industrial uses—such as furniture and clothing design, biomedical research/manufacturing, and entertainment-related post-production activities that do not necessarily generate impacts such as noise, traffic and pollution.

While the industrial/employment sector is evolving, Los Angeles County remains the largest manufacturing region in the United States. Although globalization has generally triggered an exodus of jobs from many American city centers, the strategic importance of Los Angeles and its industrial lands has been strengthened. As a recent industrial market report for Los Angeles states:

*With the regional Los Angeles economy thriving, industrial space will remain at a premium. Although other parts of the nation have suffered because of the outsourcing of manufacturing, Los Angeles has been able to cope with the problem. Due to the greater volume of imports here, the demand and need for logistics and warehouse/distribution space is very high.*⁸

Industrial districts are a critical component of the dynamic entrepreneurial economy of Los Angeles. In many instances, these thriving districts developed where a core industry was first established, later followed by support services and related businesses.

⁷ General Plan Framework, Chapter 3 Section 14.6.

⁸ Grubb & Ellis, *Industrial Market Trends: Los Angeles County* (Second Quarter 2007).

This can be seen in several industrial districts in Los Angeles that have located proximate to regional transportation infrastructure and have evolved into specialized districts such as fashion design/production, goods distribution (including food), entertainment and aerospace. These industrial districts are home to many small and start-up operations, which are a critical component of the dynamic regional economy. The entertainment industry and its support activities such as prop houses, lumber yards, digital film editing and sound stages are clustered primarily in industrial districts of Hollywood, Studio City and other parts of the San Fernando Valley. Warehousing and logistics industries are clustered into districts around the port and airports (both LAX and Van Nuys), along the freeway and rail lines bisecting the San Fernando Valley, and around the freight transportation hubs east and southeast of Downtown Los Angeles. Smaller industrial clusters remain along former railroad lines in portions of South and Southwest Los Angeles.

“Everything is made within a two-mile radius of this building. This is our way of remaining competitive.”

ERIC KIM AND HENRY KIM, CO-OWNERS OF
MONARCHY CLOTHING COMPANY IN DOWNTOWN
LOS ANGELES

Strategic Importance of Downtown Los Angeles

Los Angeles's expansive rail and freeway networks connect the Ports of Long Beach and Los Angeles to the greater Southern California region and to the rest of the United States. At the confluence of these networks, the industrial lands of Downtown Los Angeles are attractive for industries such as logistics, goods movement, wholesale and import trade, food distribution and fashion. The Downtown Fashion District is the apparel hub of the West Coast, and caters to high-end and rapid-turnaround clients that rely on the quality labor pool and proximity of Los Angeles' fashion industry. As the *LA Times* recently wrote, “At a time when more and more clothing companies are seeking cheaper manufacturing abroad, dozens of fledgling labels like Monarchy [Clothing Company] aren't. This new collection of manufacturers is capitalizing on Los Angeles' growing status as a fashion hub and helping stem some of the job losses to China, Indonesia, Vietnam and other countries—and redefining an industry that has long been a staple of the local economy.”⁹

⁹ Yi, Daniel. “Clothing maker keeps it all local.” *Los Angeles Times*, September 6, 2007.

Land for Emerging Industry Sectors

Tomorrow's industrially-zoned land, reserved for business growth and employment, is likely to look different than today's. It is important to preserve and strengthen the City's ability to maintain and expand a diverse and flexible economic and industrial base. Key to such flexibility is securing industrial land upon which cutting-edge sectors can grow, and providing new foundations for our local economy, while retaining existing businesses that currently employ hundreds of thousands of Los Angeles residents. While economists predict that sectors such as trade and logistics will continue to be robust, there are emerging industries in Los Angeles such as green technology that are particularly promising and important to the City's future competitiveness.

Los Angeles has significant strengths and is well positioned to be a global leader in fields as diverse as clean technology, biomedical device manufacturing, digital arts, furniture and apparel design and other high growth industries. Clean technology is a good example. As the green economy booms, Los Angeles is poised to become a capital in the fast-growing clean technology sector. Clean or green technology (alternative energy, energy efficiency, clean transportation, green building recycling, etc.) produces goods and services in a more resource-efficient and sustainable way. This nascent industry has raised more than \$2.7 billion in venture capital investment during the first nine months of 2007, up 46% from the entire year of 2006.¹⁰ This makes green technology the third-largest source of venture capital, behind software and biotechnology.

In green technology, Los Angeles has significant advantages over other regions: the City has committed to numerous actions that can help build the green economy (e.g., Clean Air Action Plan, implementing Assembly Bill 32, 20% Renewable Portfolio Standard, Green Building Plan). With three leading research universities in the Los Angeles region—University of California Los Angeles, University of Southern California, and California Institute of Technology—and with a large, trend-setting

Eco-industrial parks and bio-medical research parks are being developed in other cities with bold strategic visions for their futures (including Boston, Chicago, Philadelphia, and San Francisco). Such developments can cluster businesses with certain core capabilities (e.g., makers of photo-voltaic and solar energy products, electric vehicles, circuit boards, steel fabricators, design firms, renewable construction, etc.) that reduce dependence on transportation and increase competitiveness.

¹⁰ Thomson Financial and the National Venture Capital Association. "Cleantech Venture Investments By Us Firms Break Record In 2007" (<http://www.nvca.org/>) November 28, 2007.

consumer market, the City has both the human capital and the marketplace for green technology businesses to thrive.

Additionally, industrial lands in Los Angeles play an important role as incubator space for small start up and creative businesses. This entrepreneurial pattern fits perfectly into Los Angeles' tradition of supporting a broad base of independently owned and operated businesses; most businesses in Los Angeles are small, independently owned and operated.¹¹ These firms represent entrepreneurial and innovative businesses that can only become established under conditions available in industrial zones—relatively low rents, small spaces/lots and/or business incubator space. Many of these businesses are cleaner than those of the past and they provide good career-ladder jobs for local neighborhoods that have seen a decline in other local manufacturing jobs.

In order to recruit and attract these and other new businesses, the City must provide land where they can locate. Moreover, as businesses grow and expand, they often need sites to transition into larger-scale manufacturing and assembly firms. A common complaint from entrepreneurs and investors is that Los Angeles lacks available land to incubate start-up companies or to attract and retain more established companies. This factors into the decisions of some entrepreneurial businesses to leave Los Angeles once their products become commercialized. Preserving industrial land in Los Angeles is critical to encourage innovation in these emerging industries, to attract growing companies from other areas, and to grow job-producing companies already in Los Angeles.

¹¹ 94.5% of LA County businesses have fewer than 50 employees. *LAEDC, Downtown Los Angeles 2004 Economic Overview & Forecast* (prepared for Central City Association (February 2004)).

II. THE IMPORTANCE OF INDUSTRIAL LAND TO THE LOS ANGELES ECONOMY

Industrial jobs are a critical component of the region's employment base. From building construction to computer manufacturing to motion picture/audio production, industrial jobs employ about 410,000 people, about **25 percent of the total workforce in the City**.¹² These industrial sector jobs support an estimated 270,000 households and 790,000 people.¹³ Over 160,000 City residents are employed in the manufacturing sector alone, and **Los Angeles County is the largest manufacturing employment center in the nation**.¹⁴

The industries that comprise the businesses and jobs discussed in this report are based on the North American Industry Classification System (NAICS), used by the statistical agencies of the United States to classify business establishments.¹⁵ NAICS classifies as "industrial": transportation, manufacturing, utilities, construction, and wholesaling, along with high-tech industries such as computer and electronic manufacturing and software reproduction.

According to the Los Angeles Economic Development Corporation (LAEDC), the largest sectors in manufacturing within L.A. County employed the following number of workers in 2005:

- 61,500 in apparel;
- 60,500 in computer and electronic products;
- 51,900 in transportation products;
- 48,200 in fabricated metal products;
- 43,400 in food products; and
- 25,500 in furniture.

Los Angeles' Industrial Workforce

Certain communications, publishing, motion picture and sound recording industries are included as a part of the expanding creative industries sector. These jobs range from highly-skilled, technical positions to entry-level apprenticeships and career-path positions for unskilled and semi-skilled workers. Compared to retail and service jobs, industrial jobs often provide higher wages and better opportunities for skills development and career advancement. For instance, average wages for industrial jobs in the City are about \$47,000 annually while the average retail job pays around

¹² California Employment Development Dept., Labor Market Information Division, ES202 data (2005).

¹³ Census 2000, Census 2005 American Community Survey, Bureau of Labor Statistics Consumer Spending 2001-2002.

¹⁴ Grubb & Ellis, Industrial Market Trends: Los Angeles County (Second Quarter 2007).

¹⁵ NAICS Sectors 21 (Mining), 22 (Utilities), 23 (Construction), 32 (Manufacturing-Durable), 36 (Manufacturing- Non-durable), 42 (Wholesale trade), 48 (Transportation and Warehousing), 493 (Warehousing and Storage Facilities, 511 (Publishing Industries, and 512 (Motion Picture and Sound Recording Industries).

\$29,000 annually.¹⁶ Table 2 provides a sample of industrial sector wages in Los Angeles that shows the diversity of skills and wages paid.

TABLE 2: SAMPLE INDUSTRIAL AND RETAIL WAGES

Occupation	Total Employment	Median Hourly Wage	Median Annual Salary
INDUSTRIAL WAGES			
Textile cutting machine setters, operators, and tenders	2,110	\$8.85	\$18,410
Food cooking machine operators and tenders	1,450	\$9.05	\$18,830
Tailors, dressmakers, and custom sewers	1,420	\$12.31	\$25,610
Welders, cutters, solderers, and braziers	8,750	\$13.14	\$27,340
Industrial truck and tractor operators	20,630	\$15.25	\$31,720
Automotive service technicians and mechanics	17,890	\$15.40	\$32,040
Installation, maintenance, and repair occupations	128,280	\$18.85	\$39,200
Media and communication equipment workers, all other	2,560	\$20.86	\$43,380
Industrial machinery mechanics	3,000	\$20.67	\$42,990
Transportation, storage, and distribution managers	3,230	\$35.69	\$74,240
RETAIL WAGES			
Cashiers	87,320	\$ 8.69	\$18,070
Retail salespersons	125,640	\$ 9.82	\$20,420
Counter and rental clerks	15,960	\$ 9.84	\$20,460
First-line supervisors/managers of retail sales workers	32,430	\$ 17.41	\$36,200

Source: Bureau of Labor Statistics, Department of Labor, Occupational Employment Statistics (OES) Survey, May 2006 OES Estimates

Despite the tremendous amount of employment provided on industrially-zoned land, the City has been losing jobs while its population continues to increase. In 1980 there were 1,815,494 jobs in the City of Los Angeles compared to a population of 2,969,181—about 0.61 jobs per person. By 2005, the population had risen by 33 percent to 3,934,714 while jobs had decreased by about 3 percent to 1,759,202—just 0.45 jobs per person.¹⁷ Thus, while the City added about 965,500 people, employment dropped by about 56,300. In addition to providing relatively high-paying jobs, the industrial sector also offers a wide range of employment and advancement opportunities to the residents of Los Angeles.

A significant portion of the City’s population experiences barriers to employment due to low education levels, less specialized skill sets, language barriers, low incomes and lack of mobility.

¹⁶ California Economic Development Department (2005).

¹⁷ Southern California Association of Governments Regional Transportation Plan (May, 2006).

In the City, 11 percent of workers in all employment sectors take public transit to work compared to 36 percent of the workforce employed in the industrial sector.¹⁸

These constraints are especially pronounced in Central Los Angeles¹⁹, where 38 percent of the population is employed in industrial sector jobs (see table below). For instance, 79 percent of the Downtown population has only a high school diploma or less, compared to 51 percent of the Citywide workforce. Transit dependent households in Central Los Angeles are also double the Citywide percentage. The prospect of industrial businesses that provide jobs to Los Angeles' residents closing down or leaving the region as a result of being "priced out" or otherwise finding themselves adversely impacted by residential development is likely to cause significant displacement of the workforce and/or create additional challenges in their finding new employment in Los Angeles, particularly for those industrial workers who are lower-income, less formally educated, and less mobile. Industrial businesses can provide accessible jobs for these workers, with higher wages than retail and service jobs, centralized locations, opportunities for training, and the potential for upward mobility.

“Job retention and creation are directly related to enhanced economic development opportunities.”

GENERAL PLAN FRAMEWORK ECONOMIC
DEVELOPMENT CHAPTER

TABLE 3: COMPARISON OF WORKFORCE CHARACTERISTICS IN LOS ANGELES

	Within 1 mile of Downtown	Citywide
Persons over 25 who have high school diploma or less	79%	51%
Population living below poverty line	38%	22%
Housing units without access to private automobile	39%	17%
Civilian population 16 & over employed in industrial sector * (manufacturing, wholesale trade, transportation, and warehousing)	38%	21%

**Industrial in this table does not include motion picture & sound recording industries or publishing industries.*

Census 2000

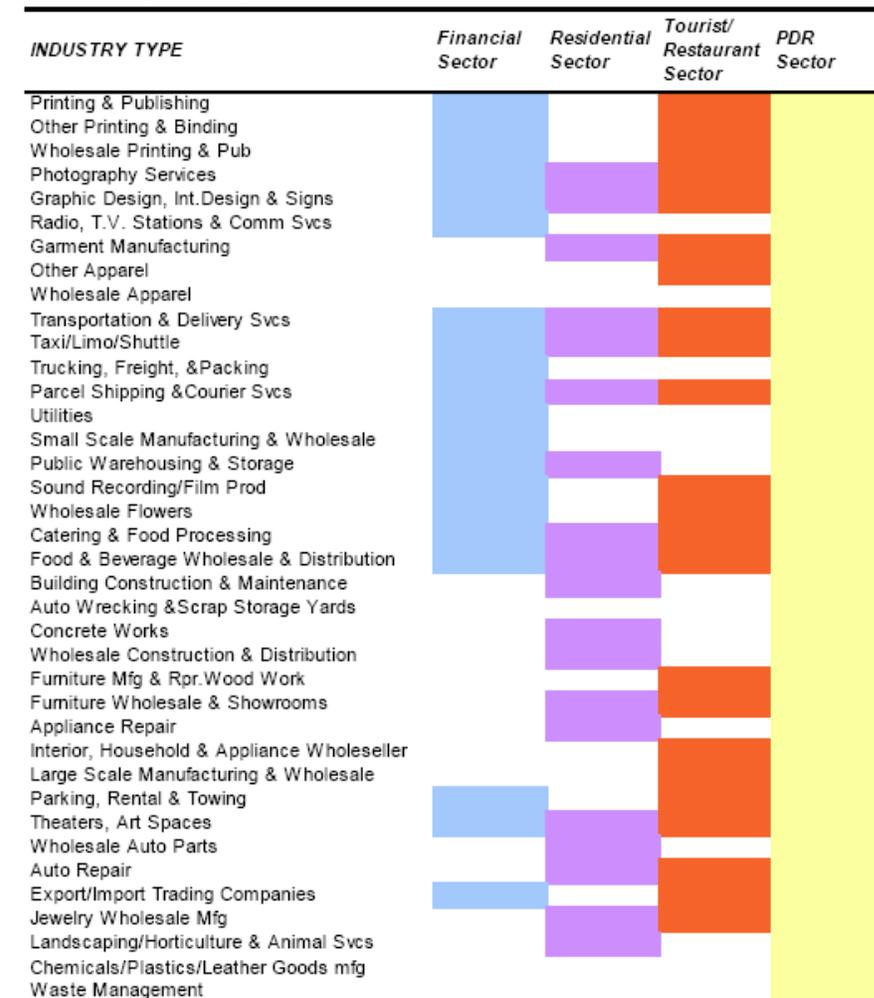
¹⁸ 2005 American Community Survey, US Census. Los Angeles City, CA, Los Angeles-Long Beach-Santa Ana, CA Metropolitan Statistical Area, S0802. Means of Transportation to Work by Selected Characteristics.

¹⁹ Central Los Angeles defined as Census tracts within 1 mile radius of Downtown Los Angeles.

“Ripple Effects” to the Los Angeles Economy

As a sector that provides shipping, wholesaling and manufacturing for an array of products used by individuals and other businesses, the industrial sector is inextricably linked to many non-industrial sectors such as retailing, publishing, marketing, professional offices, restaurants/catering, accounting, building design and more. Figure 2 below, prepared by the San Francisco Department of Planning, shows the interdependence between industrial sector businesses—identified as “production, distribution and repair business”—and other economy sectors such as finance, residential, and tourism.²⁰ The San Francisco report illustrates the importance of industrial sectors to other critical sectors of the economy highlighting the interdependence or ‘linkages’ that industrial businesses and jobs have in support of the production of goods or services.

FIGURE 2: PRODUCTION, DISTRIBUTION AND REPAIR LINKAGES TO KEY SECTORS



²⁰ From 'Industrial Land in San Francisco: Understanding Production, Distribution and Repair' (July 2002).

In Los Angeles for instance, produce and other food products are stored, packaged and distributed from warehouses and distribution centers located in Downtown to restaurants, hotels, convention facilities, schools and others businesses throughout the region. Industrial uses such as printing and machinery repair provide services for large corporations and hundreds of small independent offices. The fashion industry relies on imported goods that are finished and distributed locally. And the entertainment industry relies on post-production studio space, set design facilities, props and materials supply houses, catering, and other activities that take place on industrially zoned land.

In many cases the strengths of these linkages are also dependent on geographic proximity. In interviews with Downtown industrial businesses, many owners explained that their businesses served local non-industrial markets that needed high-quality high-turnaround products. For instance, one designer/apparel manufacturer conducts a large amount of business with Los Angeles' specialty retailers of motorcycle and car racing sports—creating custom graphics, clothing and other materials. The 'ripple effect' of the manufacturing and wholesale industries—particularly garment manufacturing in and around Downtown Los Angeles—extends well into other industries, and relies upon geographic proximity.

In 2006, businesses in the Greater Downtown Los Angeles industrial zones reported more than \$10 billion in business revenues. Wholesale business represented the major portion of reported income.

CITY OF LOS ANGELES OFFICE OF FINANCE

III. REAL ESTATE ECONOMICS SHAPING INDUSTRIAL LAND USES IN LOS ANGELES

With a constrained supply and a thriving economy, ***the demand for industrial land in Los Angeles is the strongest in the nation.*** Yet increasing land speculation for non-industrial uses on ever-diminishing industrial lands is pricing out industrial tenants and exacerbating the loss of jobs from the City.

Current Industrial Demand and Vacancy Rates

Los Angeles' vacancy rate for industrial space is extremely low with rates hovering around one percent. Recent real estate market research from Grubb & Ellis found that the LA Central²¹ market has the region's lowest vacancy rate and is the tightest in the United States. The report from Grubb & Ellis states, "Tenants must face the fact that no space is under construction and must either pay premiums to rent or buy space, or move further east to find some relief."²²

The vacancy rate for both Central Los Angeles and Downtown Los Angeles has been steadily declining as demand rises (see Figure 3). Despite this high demand, scarcity of land, speculative real estate markets for housing (which results in owners of industrial land "holding out" for potentially more lucrative buyers/developers), and high construction costs have kept creation of new industrial product relatively low²³. While the market is tightly constrained throughout the region, the greatest relative demand is in Central Los Angeles. Table 4 shows the demand for industrial land in Southern California by sub-region. The table also illustrates the variety of industrial land: incubator space, research and development, and 'flex' space are all different industrial product types. As shown in the right-hand column, rent is about \$0.60 per square foot, well below per-square foot rents for residential and commercial uses.

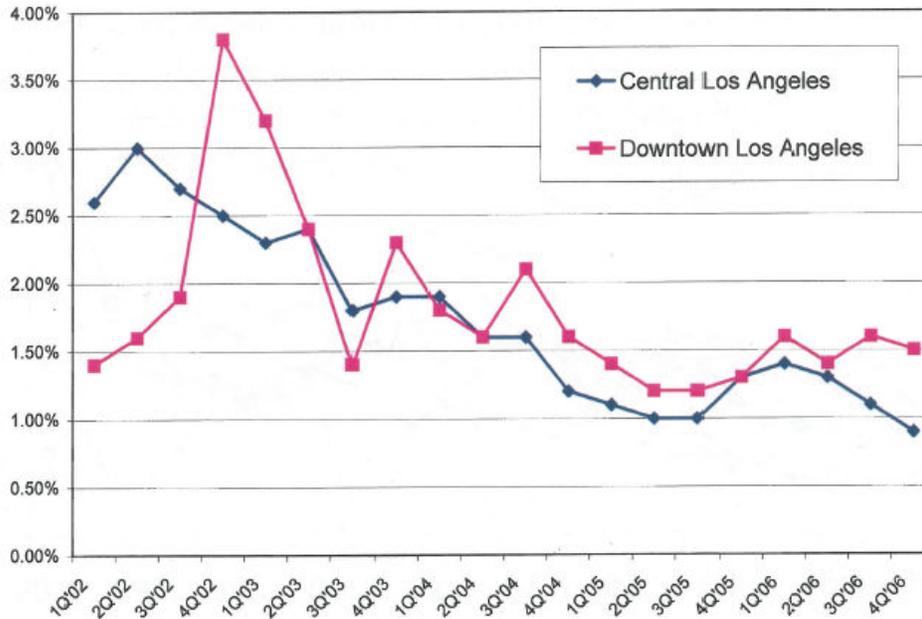
Because nearly all non-industrial uses can outbid the industrial users of the relatively inexpensive industrial land, industrial conversions are causing market speculation that is driving up industrial land costs and 'pricing out' industrial tenants, as described below.

²¹ "Central LA" includes Downtown Los Angeles, Echo Park, south Glendale, Pico Rivera, Lincoln Heights, Vernon, Maywood, Southgate, City Terrace, Commerce, and Bell.

²² Grubb & Ellis, *Industrial Market Trends: Los Angeles County* (Second Quarter 2007).

²³ Communication with Grubb & Ellis analyst (December 20, 2007).

FIGURE 3 CENTRAL AND DOWNTOWN LOS ANGELES INDUSTRIAL VACANCY RATES 2002-2006



SOURCE: Grubb & Ellis. Industrial Market Trends LA County, Second Quarter 2007

TABLE 4: INDUSTRIAL MARKET SNAPSHOT - LA COUNTY SECOND QUARTER 2007

By Submarket	Total Square Feet ¹	Vacant Square Feet ²	Vacant %	Avg. Rental Rate ³ / Sq. Ft*
Central Los Angeles	301,825,687	3,137,991	1.0%	\$0.54
Mid-Cities	121,798,508	2,902,589	2.4%	\$0.57
Los Angeles North	181,033,700	4,194,407	2.3%	\$0.71
San Gabriel Valley	184,402,104	2,981,257	1.6%	\$0.57
South Bay	220,296,398	4,739,585	2.2%	\$0.63
Totals	1,009,356,397	17,955,829	1.8%	\$0.60*
By Product Type (All Submarkets)				
General Industrial	499,746,487	7,118,536	1.4%	\$0.66
Incubator	9,353,730	62,030	0.7%	\$0.83
R&D/Flex	36,275,252	1,223,686	3.4%	\$1.01
Warehouse/ Distribution	463,980,928	9,551,577	2.1%	\$0.60
Totals	1,009,356,397	17,955,829	1.8%	\$0.65

(1) Inventory includes multi-tenant, single tenant and owner-occupied buildings with at least 10,000 sq. ft.

(2) Vacant space includes all physically vacant space.

(3) Rates for each building are weighted by the amount of available space in the building.

SOURCE: Grubb & Ellis. Industrial Market Trends LA County, Second Quarter 2007

In a 2006 analysis, Keyser Marston Associates (KMA) reported that industrial developers can typically pay about \$38 per square foot for land while residential developers can often pay about \$177 per square foot.²⁴ When land owners and developers raise their price expectations based on a perception that land is marketable for residential, commercial or other non-industrial uses, property values will rise above an economically feasible level for typical industrial users. This real estate speculation 'prices out' industrial tenants.

Real estate speculation has additional negative consequences. Industrial land owners may hold industrial zoned land without investing in industrial operations—with the expectation that more lucrative land uses would be allowed in the future. The lack of regular maintenance accelerates the obsolescence of the structures and perpetuates the cycle of disinvestment.

While economic cycles in single or multiple business sectors can alter the demand for land, zoning and the General Plan are designed to assure a balanced, sustainable economy for the City's long-term future, regardless of the inevitable ups and downs of the real estate markets. For instance, in what was once an underutilized industrial zoned district adjacent to the Downtown Historic Core now stands a thriving Toy District that generates over a billion dollars of sales and related economic activity annually.²⁵ The district was able to develop because the City did not cede to the pressure to convert industrial zoning to residential zoning during a period of weak demand. The purpose of land use planning is to look beyond the short-term expediencies of cyclical and speculative markets to assure that the City is always in a position to take advantage of future job producing opportunities.

Demand for Housing in Industrial Districts

The City Charter mandates that, to be approved, development projects must be consistent with the General Plan; projects inconsistent with the General Plan should be denied. Most of the initial industrial-to-residential conversions were approved as adaptive reuse buildings in the Downtown Artist in Residence District, where the Central City North Community Plan specifically encourages this change under certain circumstances. These initial projects were, therefore, consistent with the General Plan. However, more recently, projects were approved that partially met the criteria for conversion but departed substantially from the City's General Plan Framework and adopted policies. As a result, projects have been approved for industrial sites that are inconsistent with land use designations in the General Plan. This has occurred because projects have been evaluated with a narrow site-specific perspective and on a building-by-building basis without sufficient attention to

²⁴ ILUP Research Memorandum: "Industrial to Residential Land Use Conversions," Keyser Marston Associates, June 26, 2007.

²⁵ Central City East Association: Economic and Fiscal Impact Analysis (February 2005).

the neighborhood or district context in which the buildings are located or to the City's long range need to sustain a balanced economic base.

While many of the residential project approvals have been in the Artist In Residence District, those that were not have set a confusing precedent and contributed to housing market speculation in industrial lands—particularly in Downtown Los Angeles, where land owners or residential developers have sought to selectively convert industrially-zoned parcels with the expectation that government officials will—as they have in the past—approve a zone change to permit housing. Arguments have been made that allowing residential development on these less-expensive industrial lands will result in lower home prices and help ease the City's affordable housing crisis. Yet evidence to the contrary is clear—of the 1,746 housing units built in Downtown Los Angeles' industrial areas since 2001²⁶ not a single affordable unit was produced by the 'market'. **Less than 3% of housing on industrial land since 2001 has been affordable—and that occurred only as a result of a requirement to do so and because financial assistance from the CRA/LA or other public entities was provided.** Despite claims that industrial land is needed to help assuage the City's affordable housing crisis, the fact is that industrial land typically sells for roughly one-third of the cost of residential land, while units sell at nearly the same rates as high-end condominiums in nearby South Park. A comparison of housing sales on industrially-zoned land versus residentially-zoned land in Downtown Los Angeles shows that condominium sales prices were only about 2% less on industrial land.²⁷

Opportunities for Housing Development Throughout Los Angeles

Housing—particularly affordable housing—is a Citywide need. However, Los Angeles does not need to compromise its industrial districts to solve the City's housing crisis. The General Plan Framework and the Community Plans, which together make up the Land Use Element of the General Plan, direct housing development to job centers, mixed use districts, and areas with access to transit and neighborhood amenities. Such areas can attract and support the commercial uses, amenities, and services that residents need and desire and that create neighborhoods.

According to the current 2002 Housing Element of the General Plan, Los Angeles has an adequate supply of land zoned for housing. In and around Downtown, for example, based on an analysis conducted by the CRA/LA staff, there is still significant potential for residential and mixed use development on underutilized commercial and residential zoned parcels in South Park, Little Tokyo and the Broadway Theatre District. Excluding projects for which building permits have been issued, are under construction, and are in the entitlement process, there is capacity for approximately 10 -

²⁶ An additional 586 units in 12 projects have received discretionary approvals but are not yet under construction.

²⁷ Memo from Keyser Marston Associates, October 27, 2006.

20 million square feet of additional residential space in Downtown Los Angeles.²⁸ At an average of 1,000 square feet per unit, this currently vacant or under-utilized land could support between 10,000 and 20,000 new residential units that could house between 16,000 and 32,000 new residents, based on an average household size of 1.6 persons.²⁹

Economic Impact of Conversion to Housing on the City's General Fund

The industrial land in Los Angeles is critical to the economic prosperity of the City; the General Plan and all of its elements are based on the preservation and maintenance of the City's industrial land base. The Framework Element, the foundation of the General Plan, establishes land use designations and densities, policies and programs that sustain the City's fiscal structure as a jobs-rich environment, based on the premise that there will be a healthy jobs-housing balance of approximately 1.4 jobs³⁰ for every household. Without these jobs, the demand for municipal services will continue to grow commensurate with population growth, but the City's revenue base and related ability to provide municipal services would grow at a lower rate. The greater the imbalance, the less likely the City will be able to maintain current levels of municipal services, much less provide services for the additional 360,000 residents anticipated in the City of Los Angeles by 2030.³¹

Based on case studies in local jurisdictions including the City of Los Angeles, Keyser Marston Associates concluded that residential uses draw down approximately 65-75 percent of unrestricted General

"The City's fiscal structure has historically been dependent on a jobs-rich environment. A decline in the jobs/ housing ratio would reflect a growth pattern in which residential development outpaces commercial and industrial growth. Given that nonresidential land uses generate proportionately more fiscal revenue than residential development, a decline in the jobs/housing ratio would represent an undesirable growth pattern for the City from a fiscal perspective."

CITY OF LOS ANGELES GENERAL PLAN
FRAMEWORK 2001

²⁸ Based on vacant parcels, including parking lots, identified in Community Redevelopment Agency Survey of blighted properties (2005).

²⁹ "Downtown Los Angeles Market Report and 2006 Demographic Survey of New Downtown Residents," Downtown Center Business Improvement District, February 2007, p 34.

³⁰ General Plan Framework, Chapter 7 Economic Development p 7-5.

³¹ Southern California Association of Governments Growth Forecast (2005-2030).

Fund expenditures for police, fire, library, cultural, park and other municipal services, while contributing less than 25 percent of General Fund revenue.³² Thus, residential uses place demands on City services beyond the revenues they generate. Commercial and industrial uses, on the other hand, generate net positive revenues to the General Fund, meaning that the costs they incur for public services are lower than the revenues they generate. Lands designated for industrial use have never been contemplated to generate and support residents. As such, costs associated with providing municipal services such as police, fire, libraries, trash collection, and parks to residents introduced in previously industrial only districts have not been factored into the City's General Fund nor have they been factored into the land uses established in the General Plan. These costs constitute a "double hit" to the General Fund by increasing costs to the City while decreasing revenues.

In addition to the disproportionate fiscal impacts of new residential uses in industrial areas, the conversion displaces the businesses that fund these services. Because industrial areas typically lack the infrastructure needed for residential uses—notably sidewalks, trees, green space, schools, etc.—new residential uses in industrial areas redirect demand and resources for new investments in community infrastructure while the infrastructure in older residential areas continues to deteriorate. At the same time, industrial areas are left without the crucial infrastructure investment required to remain viable, further exacerbating the lack of private investment in industrial districts.

**REDEVELOPMENT PLAN FOR THE CENTRAL
INDUSTRIAL REDEVELOPMENT PROJECT GOAL:**

"A healthy industrial environment which generates and attracts new private investment to increase job opportunities, property values, and tax revenues."

Impacts of Industrial-to-Residential Conversion on the City's Long Term Development

When land use changes are made on a project-by-project basis, the risk of compatibility problems between new and old uses is increased over time. Noise, air pollution and truck traffic are some of the common byproducts of industrial activity. Experience shows that new residents in industrial districts eventually complain about these noxious impacts and the noise, traffic and other activities

³² Research memorandum: "Industrial to Residential Land Use Conversions: Fiscal and Economic Considerations" Keyser Marston Associates; May 4, 2007, page 2.

associated with industrial land, impeding the ability of industrial businesses to function and discouraging new industrial investment.

When industrial zones are changed and residential uses locate in these districts, industrial users may not be able to relocate, resulting in long term incompatibilities (they may also be unable to expand, adversely affecting their productivity and potential longevity). In particular, many heavy industrial users are unable to relocate due to high relocation costs, new regulations, or lack of available sites. This results in a negative situation for both industrial users and new residents. For instance, in San Diego's Barrio Logan neighborhood, where the intention was to gradually replace industrial uses, a mix of incompatible industrial and residential uses has persisted for decades, exposing residents to toxic chemicals, odors, air pollution, and water contamination.

Randomly locating residential development in industrial areas also increases the likelihood that neighborhood amenities and infrastructure will not work adequately for either the industrial or non-industrial occupants. New residents expect basic infrastructure like curbs, gutters, storm drains, and wide sidewalks in addition to typical neighborhood amenities like parks, trees, and attractive lighting, while industrial users expect wide streets and narrow sidewalks to accommodate truck traffic. When conversions to housing are made on a project-by project basis, a comprehensive public investment strategy is not implemented, resulting in inadequate infrastructure and amenities on a neighborhood or district basis.

In addition to possible displacement and conflict of uses, scattered housing development in industrial districts can detract investment from previously established residential neighborhoods. Redevelopment efforts to improve neighborhoods are processes that, even in prime economic conditions, may take decades to achieve. Locating unplanned housing in industrial or other non-residential areas only diverts private investment from planned neighborhoods attempting to achieve the critical mass needed to attract services and amenities such as grocery stores, restaurants and other neighborhood services.

There are also important public health issues associated with proper land-use planning. New research from the University of Southern California has confirmed that children living within 500 meters (approximately 1,500 feet) of freeways are suffering from significantly adverse respiratory effects of traffic pollution "which could result in important deficits in attained lung function in later life."³³ Many industrial areas are strategically located near freeways; converting these areas to residential use will only exacerbate the existing public health problems associated with automobile pollution.

³³ Gauderman, et al. 2007. 'Effect of exposure to traffic on lung development from 10 to 18 years of age: a cohort study'. Published Online January 26, 2007. DOI:10.1016/S0140-6736(07)60037-3.

Other planning efforts—beyond those of just City Planning and CRA/LA—are based on the presumption that land use planning will occur in a rational comprehensive manner. For instance, the Los Angeles Department of Transportation (LADOT) and other agencies are addressing truck access and circulation problems through operational changes, engineering measures, capital improvements and policy changes. The truck routes they plan traverse most of the City's industrial areas providing access for goods distribution. Billions of dollars have been strategically invested in the Alameda corridor—an express railway linking the Ports of Los Angeles and Long Beach with rail yards, intermodal facilities and industrial lands east and north of Downtown Los Angeles—as well as to the City's truck routes. And Los Angeles Metro's transit planning is developed in coordination with the City's land use planning efforts to ensure that bus, subway, and light rail service is targeted to the appropriate areas that can support sufficient levels of ridership and link defined activity centers strategically located across the City.

Additionally, designated revitalization areas such as Enterprise and Empowerment Zones—enacted specifically to support jobs and businesses—rely on a minimum proportion of designated zones remaining in employment production. The introduction of housing into predominantly jobs producing areas jeopardizes these special assistance zones and could trigger a loss of financial support from federal and state sources.

CONCLUSION

Recent conversions of Los Angeles' diminishing industrial and employment land to non-industrial use raise important planning and public policy concerns regarding the economic, social and physical development of Los Angeles. The General Plan Framework, the City's blueprint for development and growth, recognizes the diverse needs of the City and establishes an array of policies to guide City departments in its implementation. The City must balance various goals to meet the needs of today's residents without foreclosing on future opportunities. The Framework highlights the need to provide not only adequate land for housing, commercial, recreational, cultural and public facility uses but also the importance of ensuring that the City has adequate land for businesses, the jobs they create and sustain, and the revenues they generate for the City's General Fund. Further, the General Plan Framework elevates the need to make economic opportunities available throughout the City, with special emphasis on "portions of the City that historically have not received a proportional share of such opportunities."³⁴ Sustaining those businesses that employ today's residents is a critical part of a sound industrial land use and economic development policy for Los Angeles. Equally important is retaining land to attract and grow businesses so that they can continue to employ current and future residents.

Consistent implementation of the City's adopted industrial land use policies will help to ensure that existing industry continues to function, that current residents remain employed, that jobs of the future can locate in Los Angeles, and that neighborhoods are properly planned and developed. It is imperative that we consistently adhere to clear rules to: attract and retain private investment; for CRA/LA and other economic development agencies to foster investments by and in the City's businesses; to implement improvements to land and infrastructure; to seek out and support private business expansion; and for the Port of Los Angeles to continue its program of growth and modernization. Similarly, if Los Angeles hopes to attract green/clean technology and other emerging industries, the City must convince investors that it will protect their investment—best demonstrated by clear and consistent application of land use and development policies.

This report has demonstrated the critical role of job-producing industrial land to the City's long-term economic health and to the hundreds of thousands of residents employed in the industrial sector. Although there are claims that industrial land in Los Angeles is an abandoned remnant of an earlier manufacturing heyday, industrial demand for these areas—particularly as demonstrated in Downtown, portions of Hollywood and West Los Angeles—is still the most competitive in the nation. At a time when economic analysts are concerned that there is *too little* industrial land in the City to sustain job growth, City policymakers should be especially prudent about the future of Los Angeles' industrial lands.

³⁴ General Plan Framework Economic Development Chapter. Objective 7.10

Appendix 1

METHODOLOGY / ANALYSIS FRAMEWORK

This section provides a summary of the process used to analyze industrial districts in the Industrial Land Use Policy (ILUP) Project. The General Plan Framework states that industrial areas should be studied on a regular basis. The ILUP methodology is the suggested approach to conduct these regular evaluations of the City's industrial districts. It should be used in area-specific analyses and applied during community plan updates and other long term planning efforts.

The ILUP Project divided industrial zoned lands into four typologies that can be applied in determining how land use policies, including uses and densities, should be implemented. For each district evaluated, the analysis considered current conditions, viability of existing uses, and compatibility issues within the districts and with adjacent areas. Also considered was the need to maintain flexibility to accommodate new industries that are still evolving and could one day play an important, unforeseen role in Los Angeles' economy and job market. The four typologies are: Employment Protection Districts, Industrial Mixed Use Districts, Transition Districts and Correction Areas. (These are defined and explained in the body of the Staff Directions memorandum.)

A. Analysis and Key Considerations in Implementing Industrial Land Use Policy

The ILUP Project analyzed industrial districts experiencing the greatest pressure for conversion to residential use. The Project study area contained three geographic survey areas (Westside, Hollywood and Greater Downtown), further subdivided into sub areas and analysis zones based on similarities of uses and character. Analysis began with a field survey to catalogue existing land uses in industrial zones, based on the North American Industrial Classification System (NAICS) (see Land Use Survey Methodology).

Each industrial district was examined within its unique context; geographic, economic and social factors were considered. Multiple resources were evaluated to supplement the land use information. Employment and business data was collected from InfoUsa (2006) for each analysis zone. Keyser Marston Associates, under contract, provided City and regional industrial and housing market conditions data. Existing land uses were evaluated for consistency with adopted plans and policies including the General Plan Framework and Community Plans, CRA/LA redevelopment project area plans and specific plans,

It is the intent of the General Plan Framework Element to preserve industrial lands for the retention and expansion of existing and attraction of new industrial uses that provide job opportunities for the City's residents.

**CITY OF LOS ANGELES GENERAL PLAN
FRAMEWORK 2001**

special planning areas (such as Enterprise and Empowerment Zones), and current study areas (Transit Oriented District overlays, River Improvement Overlay, River Master Plan, etc.). Additionally, industrial studies from cities across the U.S. and Canada were also reviewed, with emphasis on approaches used to preserve industrial lands.

Interdepartmental teams of the DCP and CRA/LA reviewed the information, and obtained input from LADOT, Housing, Public Works, and CDD staff. Based on analysis and extensive discussion, preliminary findings were prepared with suggested implementation measures. These were mapped and further refined by the interdepartmental reviews. The preliminary findings were presented to the public in the fall and winter of 2006. Additional refinements to the findings and implementation measures were made based on public input and further research. Final staff guidance on implementation was published in December 2007.

B. Factors To Be Considered in Evaluation of Industrial Zones

Land Use Policy: The adopted General Plan Framework and Community Plans represent comprehensive and long-term goals and policies for development of the City. Land use designations and policies identify where industrial and other job producing activity is appropriate. Business investment is more likely where there is certainty in land use policy, as evidenced both by the City's planning documents and by its track record of handling applications for change of use and change of zone.

Strategic/Focused Planning Efforts: Uses within Specific Plan Areas or other plans or study areas such as Transit Oriented Districts (TOD) or the Los Angeles River Revitalization Master Plan indicate where public and private investment is currently being directed, and where particular types and mixes of uses are to be encouraged. Adaptive Reuse areas signify where mixed use and conversion strategies have been directed in a concerted effort to reintroduce vitality into downtown districts specifically.

Existing Uses, Scale and Concentration: Areas with a preponderance of industrial uses suggest retention as a cohesive jobs and employment district. Introducing new non-industrial uses in these areas may adversely affect the future viability of industrial or job producing activity. Small pockets or islands of industrial uses may be more suitable for conversion. Uses adjacent to or surrounding industrial districts need to be examined for compatibility with and/or transition from industrial areas to minimize adverse impacts on industrial operations. Special attention needs to be given to districts with particular industry clusters or specialized linkages (agglomeration) i.e., garment/fashion, produce, entertainment, etc.

District Character/Infrastructure: Many industrial districts are underserved and under-improved. Street, drainage, sewer, lighting, utility and sidewalk infrastructure are substandard for industrial uses and need to be improved for better functionality. Transit and pedestrian amenities, as well as design guidelines for new development, are limited in industrial areas. Industrial districts lack the traditional neighborhood services such as retail, open space/parks, libraries, and schools, and need

additional capital investment if they are to be converted to non-industrial use. Fire and Police service levels and demands in industrial districts are different from those in residential districts, raising the need for both additional capital and operating expenditures if their use is to be changed.

Access: Industrial operations as well as the region benefit from their proximity to freeways and railways, and connections to the ports and airports to move goods and products. Truck routes and rail corridors are established for the region and industrial districts have developed in proximity to these access routes. Industrial operations often require specialized access to structures such as wider streets and turning radii, and loading areas. Locating housing in close proximity to major transportation facilities raises environmental and health concerns, including noise and pollutant exposure.

Parcel Characteristics: Size and configuration of sites determine the potential for viable industrial use. Large, assembled sites are suitable for industrial uses such as logistics, warehousing, research/development parks, studios and other large-scale uses. Smaller parcels provide inexpensive sites for start-up businesses as well as incubator space for emerging industries. Vacant parcels may suggest either that transition is appropriate or that new industrial development opportunities exist; further analysis is required to ascertain cause of vacancy.

Economic Development Initiatives: Local, State and Federal programs such as Redevelopment Project Areas and Enterprise and Empowerment Zones provide important incentives for certain business activities. Often designation and associated funding are contingent upon a minimum proportion of industrial activity within plan or zone boundaries.

Reuse/Remediation Costs: Heavy industrial sites are likely to have considerable contamination. Such sites may not make feasible conversion projects due to the costs to remediate.

Local and Regional Economic Impact: There is the potential for current employees to be displaced with conversion, as well as potential fiscal impact on City revenues and costs to provide services.

Market Trends: Investment in new construction and/or renovation of industrial buildings indicates that industrial landowners and businesses are confident in the long term viability of their operations. Lack of investment may indicate lack of demand or lack of confidence that the City will continue to protect the area for its business or job potential, or that owners see the potential for increased land value with a potential conversion to another use. Very low vacancy rates suggest continued strong demand and viability, even in areas with seemingly obsolete buildings and weak infrastructure.

Demographics: Consideration of the local residential population, including transit dependency, sector employment and education should be made when determining appropriate land uses and activities. If the area were to be converted to another use, there is the potential for the local workforce to be displaced from current employment; the potential for retraining and alternate work placement should be considered.

Proximity to Transit: Many industrial areas have limited access to transportation options such as regional and local buses and light rail. Those areas with adequate or planned transit access should be evaluated for their ability to provide access to transit dependent workers, as well as the more traditional creation of mixed-use transit oriented districts.

Neighborhood Characteristics: The availability and proximity, as well as the absence of local groceries, restaurants, parks and public amenities is one indicator of the appropriateness of introducing new non-industrial uses in an industrial district. Before such assessment can be made the density and critical mass of residents needed to attract such amenities should be considered as an indicator of the ability to provide such services in the future.

C. Guiding Principles For Undertaking Analysis of Industrial Areas

The following principles were used to guide the analysis of industrial zoned land:

- Provide adequate industrial land to support a diversified and sustainable economy for the current and projected population.
- Provide land that helps meet the business growth and employment needs of current and future Los Angeles residents.
- Ensure that there is land for important services and other uses that are undesirable and inappropriate in other geographic areas.
- Protect current and future viable job-producing land from intrusions of incompatible uses.
- Provide clarity in land-use decision-making and the entitlement process for investors, business owners, workers and neighbors.
- Allow for agility in responding to the market.
- Keep synergistic districts intact (i.e., entertainment, fashion, toy, produce, flower).
- Plan for functional neighborhoods, and take actions that will attract a critical mass. Consider timeframe for evolving districts.
- Encourage transformation of inappropriate or no longer viable industrial land in non-industrial areas with housing and other uses.
- Consider environmental justice and appropriateness of uses.
- Facilitate mixed use buildings and districts where appropriate.
- When zone changes and/or other actions increase land value, ensure that community benefits are appropriately identified and provided.
- Whenever possible, provide mechanisms to mitigate the business- and job-loss impacts when zones are changed.
- Phase development to allow for absorption. Minimize or prevent unhealthy or incompatible uses by concentrating new housing development in areas planned for residential or mixed use neighborhoods.

Appendix 2

General Plan Excerpts

Chapter 3 - Land Use GOALS, OBJECTIVES AND POLICIES ISSUE ONE: DISTRIBUTION OF LAND USE

GOAL 3A

A physically balanced distribution of land uses that contributes towards and facilitates the City's long-term fiscal and economic viability, revitalization of economically depressed areas, conservation of existing residential neighborhoods, equitable distribution of public resources, conservation of natural resources, provision of adequate infrastructure and public services, reduction of traffic congestion and improvement of air quality, enhancement of recreation and open space opportunities, assurance of environmental justice and a healthful living environment, and achievement of the vision for a more liveable [*sic*] city.

Objective 3.2

Provide for the spatial distribution of development that promotes an improved quality of life by facilitating a reduction of vehicular trips, vehicle miles traveled, and air pollution.

Policy 3.2.3

Provide for the development of land use patterns that emphasize pedestrian/bicycle access and use in appropriate locations. ([P1](#), [P2](#), [P4](#))

Objective 3.4

Encourage new multi-family residential, retail commercial, and office development in the City's neighborhood districts, community, regional, and downtown centers as well as along primary transit corridors/boulevards, while at the same time conserving existing neighborhoods and related districts.

Policy 3.4.2

Encourage new industrial development in areas traditionally planned for such purposes generally in accordance with the Framework Long-Range Land Use Diagram and as specifically shown on the community plans. ([P1](#), [P2](#), [P18](#), [P21](#), [P26](#), [P37](#), [P39](#))

Chapter 3 - Land Use
GOALS, OBJECTIVES AND POLICIES
ISSUE TWO: USES, DENSITY, AND CHARACTER

INDUSTRIAL

Definition

It is the intent of the General Plan Framework Element to preserve industrial lands for the retention and expansion of existing and attraction of new industrial uses that provide job opportunities for the City's residents. As indicated in the Economic Development Chapter of the Framework Element, some existing industrially zoned lands may be inappropriate for new industries and should be converted for other land uses. Where such lands are to be converted, their appropriate use shall be the subject of future planning studies. Policies provide for the consideration of a broader array of uses within the industrial zones than has traditionally been acceptable to facilitate the clustering of uses, which may include retail, that support the basic industries or the location of industries in the same area where the waste products of one can be recycled as a resource for another ("industrial ecology") or a campus-like cluster of related uses.

GOAL 3J

Industrial growth that provides job opportunities for the City's residents and maintains the City's fiscal viability.

Objective 3.14

Provide land and supporting services for the retention of existing and attraction of new industries.

Policies

Uses and Density

- 3.14.1 Accommodate the development of industrial uses in areas designated as "Industrial-Light," "Industrial-Heavy," and "Industrial-Transit" in accordance with Tables 3-1 and 3-9. The range and intensities of uses permitted in any area shall be determined by the community plans. ([P1](#), [P18](#))

Land Use Designation	Corresponding Zones
Industrial-Light	CM, MR 1, MR 2, M1, M2
Industrial-Heavy	M 3
Industrial-Transit	CM, M1, M2, C2

- Provide flexible zoning to facilitate the clustering of industries and supporting uses, thereby establishing viable "themed" sectors (e.g., movie/television/media production, set design, reproductions, etc.). ([P19](#))
- 3.14.2 Promote the re-use of industrial corridors for small scale incubator industries. ([P1](#), [P2](#), [P26](#), [P31](#), [P36](#))
- 3.14.3 Limit the introduction of new commercial and other non-industrial uses in existing commercial manufacturing zones to uses which support the primary industrial function of the location in which they are located. ([P1](#), [P38](#))
- 3.14.4 Promote the development of a mix of commercial and light industrial uses in areas designated as Industrial-Transit. ([P1](#), [P38](#))
- 3.14.5 Consider the potential re-designation of marginal industrial lands for alternative uses by amending the community plans based on the following criteria:
- a. Where it can be demonstrated that the existing parcelization precludes effective use for industrial or supporting functions and where there is no available method to assemble parcels into a unified site that will support viable industrial development;
 - b. Where the size and/or the configuration of assembled parcels are insufficient to accommodate viable industrial development;
 - c. Where the size, use, and/or configuration of the industrial parcels adversely impact adjacent residential neighborhoods;
 - d. Where available infrastructure is inadequate and improvements are economically infeasible to support the needs of industrial uses;
 - e. Where the conversion of industrial lands to an alternative use will not create a fragmented pattern of development and reduce the integrity and viability of existing industrial areas;
 - f. Where the conversion of industrial lands to an alternative use will not result in an adverse impact on adjacent residential neighborhoods, commercial districts, or other land uses;
 - g. Where it can be demonstrated that the reduction of industrial lands will not adversely impact the City's ability to accommodate sufficient industrial uses to provide jobs for the City's residents or incur adverse fiscal impacts; and/or
 - h. Where existing industrial uses constitute a hazard to adjacent residential or natural areas.
- ([P1](#), [P18](#))
- 3.14.9 Initiate programs for lot consolidation and implement improvements to assist in the retention/expansion of existing and attraction of new industrial uses, where feasible. ([P36](#), [P37](#))

Chapter 7 – Economic Development GOALS, OBJECTIVES AND POLICIES

GOAL 7A

A vibrant economically revitalized City.

Objective 7.1

Focus available resources on a coordinated and comprehensive effort to promote economic activity in Los Angeles, including an aggressive marketing program that communicates the resources and assets available within the City.

Policies

- 7.1.2 Encourage community-based service and development entities in efforts to create small business expansion at the local level. ([P35](#), [P43](#))
- 7.1.3 Create and implement an economic development strategy. ([P35](#))
- 7.1.4 Develop an infrastructure investment strategy to support the population and employment growth areas. ([P36](#))
- 7.1.5 Allocate available public resources within the context of the market demand anticipated over the next five years. ([P38](#))
- 7.1.6 Identify Federal and State mandates which represent unreasonable barriers to future economic development in the City, and begin to address these mandates through appropriate lobbying efforts. ([P27](#))

GOAL 7B

A City with land appropriately and sufficiently designated to sustain a robust commercial and industrial base.

Objective 7.2

Establish a balance of land uses that provides for commercial and industrial development which meets the needs of local residents, sustains economic growth, and assures maximum feasible environmental quality.

Policies

Industrial

- 7.2.8 Retain the current manufacturing and industrial land use designations, consistent with other Framework Element policies, to provide adequate quantities of land for emerging industrial sectors. ([P1](#), [P18](#))

- 7.2.9 Limit the redesignation of existing industrial land to other land uses except in cases where such redesignation serves to mitigate existing land use conflicts, and where it meets the criteria spelled out in Policy [3.14.6](#) of [Chapter 3: Land Use](#). ([P18](#))
- 7.2.10 Ensure that the City's industrial sites are regionally competitive to maintain and enhance a core manufacturing base. ([P37](#), [P38](#), [P39](#))
- 7.2.11 Ensure that the City has sufficient quantities of land suitable to accommodate existing, new and relocating industrial firms, whose operations are appropriate to a specific location in Los Angeles. ([P18](#), [P26](#), [P38](#))
- 7.2.12 Establish, as shown in [Figure 7-1](#), the area adjacent to the Port of Los Angeles, the rail corridor bisecting the San Fernando Valley, and the South Central/Southeast industrial area as market-linked targeted industrial areas (market-linked areas are described on page 7-4). ([P1](#), [P18](#))
- 7.2.13 Facilitate environmentally sound operations and expansion of the Port of Los Angeles and the Los Angeles International Airport as major drivers of the local and regional economy. ([P3](#), [P5](#), [P6](#), [P42](#))
- 7.2.14 Take steps to assure that new industries developed are sensitive to environmental and conservation issues, and that cumulative environmental impacts are addressed.

GOAL 7C

A City with thriving and expanding businesses.

Objective 7.3

Maintain and enhance the existing businesses in the City.

Policies

Industrial

- 7.3.4 Recognize the crucial role that the Port of Los Angeles and the Los Angeles International Airport play in future employment growth by supporting planned Port and Airport expansion and modernization that mitigates its negative impacts. ([P5](#), [P40](#))
- 7.3.5 Improve the movement of goods and workers to industrial areas. ([P3](#), [P4](#), [P45](#))
- 7.3.6 Retain the City's existing manufacturing base through an outreach program to existing businesses and an ongoing assessment of their specific land use requirements. ([P35](#), [P36](#), [P62](#))
- 7.3.7 Prioritize the retention and renewal of existing industrial businesses. ([P35](#), [P36](#), [P37](#))

- 7.3.8 Assist existing industries located in Los Angeles with their expansion plans and/or relocation efforts to find suitable industrial sites in the City. ([P36](#), [P37](#))

GOAL 7D

A City able to attract and maintain new land uses and businesses.

Target Industries

Objective 7.5

Capture a significant share of regional growth in the "targeted" or emerging industries in the City of Los Angeles.

Policies

- 7.5.1 Identify emerging and pro-actively clean industries to specifically attract to the City of Los Angeles. ([P35](#))
- 7.5.2 Maintain an ongoing dialogue with representatives of major firms in the target industries to determine facility/siting, infrastructure, and labor force requirements. ([P35](#), [P37](#))
- 7.5.3 Strive to provide an industrial business climate that meets the needs of the targeted industries. ([P21](#), [P35](#), [P36](#), [P40](#))
- 7.5.4 Proactively market Los Angeles to emerging industries to encourage them to locate within the City, with an emphasis on the attraction of environmentally-oriented and "clean" industries. ([P35](#), [P40](#))

GOAL 7E

A City with a highly qualified labor force.

Objective 7.7

Achieve an effective "match" between the qualifications of the local labor force and the anticipated personnel requirements of existing and emerging industries in the City.

GOAL 7F

A fiscally stable City.

Objective 7.8

Maintain and improve municipal service levels throughout the City to support current residents' quality of life and enable Los Angeles to be competitive when attracting desirable new development.

Policies

- 7.8.1 Place the highest priority on attracting new development projects to Los Angeles which have the potential to generate a net fiscal surplus for the City. ([P35](#), [P36](#))
- 7.8.2 Implement proactive policies to attract development that enhances the City's fiscal balance, such as providing financial incentives and permitting assistance. ([P35](#), [P36](#), [P40](#), [P67](#))
- 7.8.3 Encourage mixed-use development projects, which include revenue generating retail, to offset the fiscal costs associated with residential development. ([P18](#), [P22](#))

GOAL 7G

A range of housing opportunities in the City.

Objective 7.9

Ensure that the available range of housing opportunities is sufficient, in terms of location, concentration, type, size, price/rent range, access to local services and access to transportation, to accommodate future population growth and to enable a reasonable portion of the City's work force to both live and work in the City.

GOAL 7H

A distribution of economic opportunity throughout the City.

Objective 7.10

Program resources in a manner that encourages appropriate development, housing opportunities, transit service and employment generation in all areas of the City, with particular emphasis on those portions of the City which historically have not received a proportional share of such opportunities, consistent with the City's overall economic policies.

Appendix 3

Other Existing Policies that Shape Industrial Districts

Adaptive Reuse Ordinance

In 1999, the City adopted an ordinance to facilitate the conversion of old, abandoned Downtown office buildings into housing. That ordinance made it possible to convert many historic buildings within a designated geography into apartments and condominiums by waiving modern zoning requirements that were difficult to apply to historic buildings. The adaptive reuse ordinance has now been expanded to Hollywood, Koreatown, Chinatown, and other areas and a modified version has been adopted that applies Citywide. The expanded ordinance does not allow live-work by right; zoning administrator approval is required. New construction—live-work or otherwise—is not allowed.

When Adaptive Reuse projects are in industrial zones, they have to meet certain criteria. This includes limiting permissible occupations to arts-related occupations such as architects, multimedia, fashion, and interior design. ***And, pursuant to the code, no building can be converted to residences under the Adaptive Reuse Ordinance if such conversion will displace current or future industrial uses.***

Joint Living and Work Quarters

Joint Living and Work (Live-Work) Quarters permit combined living and work units that include a kitchen and a bathroom in abandoned industrial buildings. The residential portion of the unit, including the sleeping area, kitchen, bathroom, and closet areas, can occupy no more than 33 percent of the total floor area, and the living space is not separated from the work space. Living and work spaces which are independently accessible are not considered live-work.

To gain approval, the Los Angeles Municipal Code (Section 12.24.X.13) states “that the uses of property surrounding the proposed location of the joint living and work quarters and the use of the proposed location will not be detrimental to the health, safety and welfare of prospective residents of the quarters; and that the proposed joint living and work quarters will not displace viable industrial uses and will not substantially lessen the likelihood that the property will be available in the future for industrial uses.”

Artist in Residence District

The Artist in Residence District (AIR) is an area of Downtown Los Angeles designated by the Central City North Community Plan, and bounded by First Street, the Los Angeles River, Sixth Street, and Alameda Street. The purpose of the AIR District, as stated in the Central City North Community Plan, is “to identify the presence of the artists as a distinct and integral part of the Central City North

Community.” This is the only district in which City policy *encourages* residential development in an industrial area.

Single Room Occupancy Interim Control Ordinance

In May of 2006 the City enacted an interim control ordinance to temporarily prohibit the conversion or demolition of guest rooms or efficiency units in Residential Hotels, which at the time were being rapidly converted into market-rate residential developments and exacerbating the affordable housing crisis. The Los Angeles Housing Department (LAHD) reported that from 1995 through 2003, the City lost ten Single Room Occupancy (SRO) hotels³⁵ with a net loss of 1,087 units.³⁶ These SRO hotels are primarily located in Downtown Los Angeles and are mostly located on industrially-zoned land. Conversion of these SROs to market-rate housing unaffordable to the vast majority of Los Angeles residents is a component of the Downtown housing market resurgence that is also putting pressure on industrial buildings to convert to luxury housing.

Downtown Residential Development Guidelines

The CRA/LA's Downtown Residential Development Guidelines restrict the use and development of Residential Hotels in the City Center and Central Industrial Redevelopment Project Areas to preserve existing affordable housing, guarantee one-for-one replacement of affordable Residential Hotel units when a Residential Hotel is proposed for conversion or demolition, and prevent or mitigate the hardship that results to predominantly lower income households when residential displacement occurs.

The CRA/LA will not sign permit requests for demolition, rehabilitation or conversion of a residential hotel unless:

1. The proposed new use is an affordable housing project covenanted for at least 55 years
2. The demolition, rehabilitation or conversion is required by the Building and Safety Department to meet immediate health and safety violations and no Residential Hotel occupants are permanently displaced. If permanent displacement is necessary to meet code requirements, the Residential Hotel occupants must be relocated in accordance with the Development Guidelines and development of replacement units would be triggered.
3. The Residential Hotel is converted or demolished but Residential Hotel units are replaced on a one-for-one basis and all displaced persons receive relocation benefits.

³⁵ Single Room Occupancy (SRO) Hotels are a subset of Residential Hotels, distinguished by a lower ratio of bathrooms to guest rooms than in other Residential Hotels.

³⁶ Interim Control Ordinance (Ordinance No. 177557, May 10, 2006.

Appendix 4a

Other Cities' Industrial Land Use Policies³⁷

The importance of developing policies to preserve and promote industrial uses is not a problem unique to Los Angeles. Many other cities throughout North America have addressed the changing nature of industry and pressures from residential conversion with innovative strategies to preserve areas that create and sustain local jobs—ranging from land use policies to economic incentives to public outreach. The following list of strategies from other cities is not meant to be exhaustive, but to give a sense of the diversity and scope of various approaches.

Land Use Policies

In New York City, planners and policymakers designated 'Industrial Business Zones' (IBZs) to better reflect the most productive industrial districts within the city. Within these IBZs, there is an officially-mandated guarantee not to rezone or allow residential uses. 'Buffer areas' were created around these IBZs to allow conversions under certain circumstances. The City of New York—which controls about 13 million square feet of industrial space itself—began offering city-owned parcels to industrial businesses seeking to build their own facilities. During 2004, roughly 400,000 square feet of building space was constructed and about \$45 million invested to develop these sites, resulting in the retention of 294 industrial jobs and the creation 300 additional jobs.

Likewise in the City of Chicago, 'Permanent Manufacturing Districts' (PMDs) have been extremely effective in preserving industrial areas. PMDs were created as prototypical industrial sanctuaries, and are almost always combined with the use of Tax Increment Financing to ensure tax incentives for land owners. Each PMD provides that no residential uses will be permitted, with supplementary regulations specifying uses and restrictions adopted on an ad-hoc basis for each particular area when the district is applied to the zoning map.

In addition to setting aside land for industrial use, many cities are revising their zoning codes to accommodate changes in the industrial sector. In the City of Baltimore, new zoning categories were added to the city's zoning code to remedy weaknesses in the existing industrial zoning classifications. New categories included: *Industrial Park* for properties of 20 acres or more, which would impose setbacks, design guidelines and performance standards to ensure quality development; *Urban Business*, which would accommodate office and technology uses (the city

³⁷ Research by CRA/LA staff and LAEDC Memo on Best Industrial Land Practices of Other Industrial Cities (September 11, 2007).

decided that urban business zones should be created that exclude retail); and *Port-Compatible Development*, which designates and protects industrial and port-related activities.

The City of Vancouver wanted to bring zoning regulations into the 21st Century to better reflect the modern industrial sector in their city; these changes included: increasing the allowable floor area for service industrial uses; creating new definitions (for example, a new definition was created for “software manufacturing”); increasing the amount of accessory and office space allowed; and facilitating “change of use” in inner-city industrial areas (for example, manufacturing uses may be permitted without requiring additional parking if it cannot be provided). And in the City of Toronto, zones formerly designated ‘commercial’ and ‘industrial’ are now defined more openly as *employment areas* that ‘reflect the broad objective of retaining places of business and developing and intensifying job growth’³⁸ The new land use designations give flexibility and allow the specifics of zoning laws to address specific needs.

Many cities have developed criteria that must be met before conversions will be considered. In the City of Vancouver, before land can be released from industrial uses, it must be shown that the proposed development will not affect the operations of adjacent existing or potential future industrial activity in the area. Moreover, the proposed development should not increase land values of surrounding industrial land. In the City of Baltimore, certain guidelines must be met to change the use such as demonstrating that the intensity, investment levels and economic benefits of the new use far outweigh the alternative industrial use; that any nearby concentration of viable industry would not be negatively affected by the new uses; and that the new use should produce more jobs than the alternative industrial use.

In the City of Portland, Employment and Industrial Zones have use restrictions that protect these lands by curbing the development of non-industrial uses through a discretionary review process that encourages the preservation of industrial uses while allowing residential uses in very limited situations, such as: where residential uses will not interfere with industry (have adverse effects on nearby industrial firms), where they will not alter the overall industrial character of the area based on existing proportion of industrial to non-industrial uses, and where the residential development needs to be located in an industrial area/building because industrial firms and/or their employees constitute the primary market of the proposed use. Similarly, Oakland recently developed a list of criteria that ensures economic benefits, social/environmental justice, and access to transit before converting industrially-zoned land.

³⁸ Section 4-2, Toronto Official Plan.

Economic Development Incentives & Strategies

Cities can develop policies that address the needs of industrial businesses through their economic development strategies. In the City of Portland, financing and incentive strategies were used to preserve the city's *most readily* developable industrial land supply, including: targeting public infrastructure investments (roads and utilities); creating industrial land banking activities; developing local tax incentives such as allowing property tax abatement for industrial redevelopment projects; and expanding government loan and grant programs that could be used for environmental remediation on industrial land. In Toronto, the City of Toronto Economic Development Corporation (TEDCO) helped with business relocation assistance and was able to relocate some tenants successfully. For example, one of the larger firms successfully relocated was Canpar (one of Canada's leading small parcel delivery companies), which TEDCO assisted in relocation while 'achieving the City's objectives of employment land preservation and job retention.' The Canpar shipping facility was relocated elsewhere in the city with significant assistance that included: purchase of land elsewhere within city limits; development of ½ the new site; and construction of the new buildings.

Education, Outreach & Marketing

Communicating the city's policies and encouraging feedback from diverse constituencies is critical to developing an effective policy. The New York City Economic Development Corporation (NYCEDC) implemented a universal IBZ branding campaign as well as IBZ-specific packages to market individual IBZ areas, and the New York City Department of Small Business Services (SBS) conducted outreach to industrial companies.

In the City of St. Louis, there was a small but job-rich industrial area that was facing loft conversions. A private consultant proposed that the city should stem land speculation by announcing and publicizing the city's plans for industrial retention, as well as the promotion of the significance of small businesses on the local economy, often not recognized by area stakeholders and public officials.

The City of San Francisco generated a report entitled: *Industrial Lands in San Francisco: Understanding Production, Distribution, and Repair (PDR)* to help stakeholders understand what industrial means in the modern era, why it is important to the San Francisco economy, and what needs to be done about this critical part of San Francisco's urban development.

Appendix 4b

SUMMARY COMPARISON OF INDUSTRIAL LAND USE STUDIES

	Reason for Study	Description of Program	Land Use Implementation	Other Related Strategies/Misc.
Baltimore	<p>Port expansion – need to protect port-related industrial property; Development pressure and job retention.</p> <p>Baltimore Development Corporation (consultant)</p> <p>Industrial Land Use Analysis Report / 2003</p> <p>30% of City, 15,133 acres/ 13.5% vacancy</p>	<p>Presented guidelines for change-of-use decisions. Evaluation of 8 industrial areas and recommendations for 12 'unstable' properties.</p> <p>Goals:</p> <ul style="list-style-type: none"> • Maintain an adequate supply of industrial land • Provide certainty for developers • Reinforce existing office and residential districts. 	<p>New Zones: Industrial Park, Urban Business, Mixed Use, Port-Compatible Development.</p> <p>Allow office and technology by exception in industrial zones if more jobs would be created than alternative industrial use.</p> <p>Rezoning: concentrate M-3 in established clusters. Buffering & landscaping standards for downzoned areas.</p> <p>New Maritime Industrial Overlay District.</p>	<p>Brownfield development, TIF financing, Eminent Domain, and "streamlined permitting" for desirable development</p> <p>Currently a 10 year moratorium for development in portside industrial zones. Plan does not contain strategies for workforce development or housing.</p>
Boston	<p>Job creation and retention; Residential development pressure, esp. in Downtown/</p> <p>Mayor & Redevelopment Authority</p> <p>Boston's Back Streets Program / 2002</p> <p>5% of City,</p> <p>1,561 acres/ 2.7% vacancy</p> <p>46,000 jobs in 2000/ 7% City Employment</p>	<p>Preservation and growth of 8 established industrial areas. Comprehensive, strategic use of land, job training and financial resources.</p>	<p>Marine Industrial Park</p> <ul style="list-style-type: none"> • Institutional Master Plan • All M1, M2, M3 allowed • 2500 jobs and 180 businesses • Tenants include biomedical manufacturers, beer brewers, curtain makers, and computer manufacturers <p>Strategic Plans:</p> <ul style="list-style-type: none"> • Ex: South Boston / Massport SP • Maintain Priority on Port-Related Activities • Improve Port Access while Limiting Traffic Impacts • Facilitate Development of a Mixed-use District. 	<p>Site location, workforce development, advocacy and navigation (district liaisons), financial assistance (tax breaks and incentives) and a formal, collective voice in future planning.</p>

Chicago	<p>Loss of manufacturing jobs / City of Chicago</p> <p>Industrial Corridors & Planned Manufacturing Districts</p> <p>8.63% vacancy rate</p> <p>193k sq ft total</p> <p>98,000 manufacturing jobs in 2000</p>	<p>Identified 25 industrial corridors and 13 Planned Manufacturing Districts which together preserve about 50% of Chicago's M-zoned land—outside of these, change of use is reviewed case-by-case.</p> <p>The Industrial Corridor Program is designed to make Chicago's industrial environment competitive by bringing company and community interests together to plan and implement improvements in dedicated industrial areas.</p> <p>The program makes resources available to select Local Industrial Retention Initiative (LIRI) organizations to create, implement and manage strategic development plans for specific corridors.</p>	<p>Industrial Residential Buffer Zones – proposed: 'Commercial, Manufacturing and Employment' zone would allow commercial developments up to a 5:1 floor to area ratio, but developments larger than 75,000 square feet, must go through a 'Planned Development' review.</p> <p>4 New Downtown designations including:</p> <ul style="list-style-type: none"> • DS, Downtown Service – for areas with many types of commercial and service uses that are essential for the livelihood of downtown businesses and residents. Typical uses range from large distribution and shipping centers to small-scale office, commercial, and light industrial operations, to big-box retailing. <p>4 new half-step districts allow smoother transitions between existing districts, in terms of FAR and # of dwelling units.</p>	<p>TIFs (Tax Increment Financing) for infrastructure improvements and job creation programs. Enterprise zones, Industrial Street and Alley Vacation program, 1 Eco-Industrial Network (Calumet). If adaptive reuse area is recommended, sales tax increment to be invested in neighboring industrial areas. Focus on communications upgrades in industrial areas.</p> <p>'Made in Chicago' assists local production/manufacturing businesses with marketing and business development.</p> <p>City uses condemnation, tax reactivation, and lien foreclosure to acquire and assemble industrial parcels. Now applying in more areas with retail and residential speculation.</p>
Los Angeles	<p>Industrial Land Use Policy Project</p> <p>City of Los Angeles Department of City Planning, Community Redevelopment Agency/LA</p> <p>14,093 acres of Industrial Use (8% of City zoned industrial)</p> <p>.9% Vacancy Rate</p>	<p>Policy study and land use change recommendations in response to the trend of converting industrial land for residential, commercial and institutional uses. Staff recommendations regarding current city policy—to preserve industrial districts for job-producing uses—and recommendations to review certain key areas for new General Plan designations and/or zoning will be transmitted to the Planning Commission (pending Spring /Summer 2007).</p> <p>No change to the General Plan will directly occur from these policy recommendations; stakeholder input regarding land use changes will be included in the Community Plan Update process.</p>	<p>Implementation options being explored include:</p> <ul style="list-style-type: none"> • Rezoning through Community Plan Process to allow for new definitions of industrial uses and transitional districts. • Offering development agreements to developers of conversion projects to provide public benefit • Modifying Artist Housing and Live/Work definitions • Industrial design and building guidelines • Vertical integration of uses • Increased FAR for new industrial uses 	<p>Beginning stages of inter-agency effort to design business attraction, workforce development and affordable housing strategies in the evolving industrial climate.</p> <p>Recognized need for infrastructure improvements; working to identify funding sources for these improvements.</p>

<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Minneapolis</p>	<p>Diversify the local economy.</p> <p>Industrial Land Use Study</p> <p>3,987 acres industrial zoning;</p> <p>3,132 acres industrial land use</p>	<p>3 general recommendations were submitted:</p> <ul style="list-style-type: none"> • Provide policy statements to guide land use, • Outline criteria for LU decisions, • Limit LU changes <p>City decided to combine recommendations: 'Strengthen policy statement in Minneapolis Plan; Clearly define Employment Districts.'</p>	<p>Adopted Recommendations:</p> <ul style="list-style-type: none"> - Designate 2,193 acres for continued industrial use, which represents 55% of industrial-zoned acreage and 70% of industrial-used land. - Revise Minneapolis Plan to clarify that Industrial Business Park Opportunity Areas (IBPOA) are prioritized for industrial use. - Clearly define boundaries of Industrial Business Park Opportunity Areas in the Minneapolis Plan. 	<p>Study did not account for increased city services when converted from industrial to residential.</p> <p>City did not adopt measures to prohibit residential development in Employment Districts (Industrial Living Overlay District – ILOD)</p>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">New York</p>	<p>Residential development pressure & Interest in diverse economy / Mayor</p> <p>Protecting and Growing NYC's Industrial Job Base / 2005</p> <p>4% of City, 6,101 acres</p> <p>233,000 jobs in 2000</p>	<p>Preserve industrial zoning by designating 16 Industrial Business Zones (IBZs) in areas with high concentration of industrial uses, to prohibit residential.</p> <p>IBZ geographic boundaries were delineated largely on pre-existing boundaries of In-Place-Industrial-Parks, established in 1980.</p> <p>Area planning studies conducted to identify solutions unique to each IBZ.</p> <p>Designated three (3) Industrial buffer (Ombudsman) areas adjacent to residential.</p>	<p>IBZs: M2 and M3 zoning designations guaranteed in perpetuity (current administration's commitment)</p> <p>Ombudsman Areas:</p> <ul style="list-style-type: none"> • Enforce industrial zoning • Buffer zones between Res & IBZs • MX – Industrial Mix zoning • Trained on-site ombudsmen mitigate compatibility issues • Tax incentives and zoning commitments do not apply • Ex: Tribeca and Loft Districts <p>New M1-D designation (non IBZs):</p> <p>Areas which have a significant number of residences; allow conversion to residential by right.</p>	<p>IBZs:</p> <ul style="list-style-type: none"> • Dedicated business councilors • Relocation assistance to firms outside IBZs • Market IBZs to emerging and expanding businesses • Discourage illegal conversions • Lower the cost of Industrial real estate production and maintenance with incentives, rebates, etc • Commercial fleet parking violations program to facilitate delivery and services • Education centers with dedicated business councilors and Ombudsmen located in each IBZ • Make under-utilized city owned land available for industrial use. • Administer Bi-annual industry survey

<p>Oakland</p>	<p>Residential/Industrial land use conflicts Business Development Staff w/planning, workforce development, and redevelopment agency (& consultant)</p> <p>17.73 Industrial Districts— Zoning Update, Industrial Lands Policy Review</p> <p>2,804 acres, 8% Industrial land use</p> <p>4.8% Vacancy rate</p> <p>25,458 employed in Manufacturing, warehousing, and utilities. 15% of employed residents in these sectors.</p>	<p>Following their zoning update, Oakland prepared land use recommendations for industrial areas,</p>	<p>4 Industrial Districts:</p> <ul style="list-style-type: none"> • Commercial and Light Industrial Business Mix (CIX)- technology, live/work conditionally, big box near freeway/BART • Light Industrial Business Mix (IBX) - Heavy commercial and light industrial. Heavy manufacturing & live/work conditionally. • General Industrial (GI)-uses that generate offsite impacts. All uses that may inhibit industrial uses prohibited. This zone only mapped 300 ft from existing Open Space, Residential, and Institutional. • Industrial Office Park (IO) - Large parcel development; light industrial, R&D, wholesale & dist, large scale office. <p>4 Criteria for industrial / residential conversions</p> <ul style="list-style-type: none"> • Gen Plan Consistency- should support neighborhood & citywide goals. If converted, no neg. impact on industrial business. • Economic Benefit- Not located on lands that could be used to produce jobs. No secondary impact to other Oakland-based business. • Environmental Quality- Conversion should include buffers and mitigation from industrial impacts. • Transit Modes & TODs- no conversion of sites with direct access to cargo/freight. New residential should be TOD so as not to increase traffic in industrial districts. <p>Health and Safety Overlay Zone created for industrial districts within 300 feet of residential to regulate health impacts of uses.</p>	<p>Zoning recommendations developed as location specific, i.e. CIX only in West Oakland, etc.</p> <p>Currently under consideration/discussion: a correct proportion of residential conversions in by-right industrial areas.</p> <p>Mid-study, council voted to exclude some areas of agreed-upon industrial retention.</p>
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<p>Pittsburgh</p>	<p>Residential and mixed-use conversion pressures</p> <p>No Study</p> <p>7.1% of City; 2,545 acres of industrial use</p> <p>8.7% vacancy rate</p>	<p>As part of zoning update, new zoning districts were created that actively preserve and enhance the productivity of industrial areas.</p>	<p>New Zone Designations:</p> <ul style="list-style-type: none"> • NDI – Neighborhood Industrial: allow a broad range of industrial uses and encourage development patterns that include a mix of housing, employment and shopping opportunities. • UI – Urban Industrial: allow mid-sized to large industries in a flexible district with multi-use buildings and flexible spaces for office parks, incubator spaces, high technology and service sector industries. • GI – General Industrial: accommodate a full range of industrial, manufacturing, warehouse, and similar uses which are incompatible with lower intensity land uses. 	
<p>Portland</p>	<p>Accommodation of 'New Urban Economy' & employment preservation</p> <p>Bureau of Planning + multiple regional agencies</p> <p>Central Eastside Industrial Zoning Study, 2003 / Regionally Significant Industrial Areas</p> <p>6.3% vacancy rate</p> <p>48,690 employed in manufacturing, wholesale, warehousing and utilities. 18.4% of employed persons work in these sectors.</p>	<p>Identify 20 year industrial land needs based on regional job forecasts and design strategies for Portland's industrial and employment zones generally allow a full range of industrial use categories; the distinctions between the zones lie more in their development standards and allowances for non-industrial uses.</p>	<p>Protection of Industrial and Employment districts through strict discretionary review process: no adverse impacts on industrial firms, not alter character thru incremental change, need for industrial location; buffers, transit and landscape plan must be included. 'Plan Districts' are neighborhood designations that comply with current zoning and include other regulations (job retention, environmental/cultural protection, etc). New zones: Industrial Office (to include digital industry with customer visits), and Industrial Serving Retail.</p>	<p>Public infrastructure investment, tax breaks, public/private partnerships to assist in master planning industrial real estate developments. Development Commission established 7 industrial clusters; Transit Dept.'s Freight Master plan; River Planning process to revitalize riverfront industrial areas; Brown/Greenfields study.</p>
<p>San Francisco</p>	<p>Affordable housing shortage & preservation of existing industry</p> <p>Industrial Protection Zones</p> <p>7% zoned industrial</p> <p>51,220 employed in manufacturing, warehousing, wholesale and utilities. 13% of employed work in these sectors.</p>		<p>Service/Light Industrial District that prohibits general office use, but specifically allows work space for design professionals, in keeping with the zone's specific arts-related theme. New PDR (production, distribution and repair) zoning designations: Large Commercial PDR, Light PDR, Core PDR.</p>	<p>A relatively small portion of the targeted PDR areas will have strict protections from non industrial uses.</p> <p>3% industrially zoned land expected to remain.</p>

<p style="text-align: center;">San Jose</p>	<p>"Employment Land Conversion" / City of San Jose (consultant)</p> <p>San Jose Industrial Land Supply and Fiscal Impact Analysis / 2004</p> <p>3,023 Vacant Acres</p> <p>116,240 employed in manufacturing, warehousing, wholesale and utilities. 27.8% of employed work in those sectors.</p>	<p>A major background study was performed to estimate future demand for industrial land as part of the San Jose General Plan Update. Analysis of San Jose's economic base and employment trends, interviews with experts regarding future space use patterns, and estimates of building needs by economic sector. Includes an overview of high technology industries and 15 in-depth interviews with corporate leaders to estimate the 20-year demand for industrial land.</p> <p>Includes recommendations about development mixes and densities that would use the city's land resources efficiently, intensify development in the areas served by light rail, provide a positive fiscal outcome, and support long-term economic development while meeting the city's need for new housing. Projected land demand for employment uses and determined which areas would be most important for San Jose's long-term competitiveness, particularly in the high-tech industries.</p>	<p>In progress.</p>	<p>Implementation has been on hold. Currently undergoing Gen Plan update. New Mayor (inaugurated Jan. 1, 2007) is interested in exploring new zoning options.</p>
<p style="text-align: center;">Seattle</p>	<p>Encourage industrial activity & diverse economic base</p> <p>Industrial Areas Land Use Policies</p> <p>49,171 employed in manufacturing, wholesale, warehousing and utilities. 15.8% of employed work in these sectors.</p>	<p>Promote expansion/locational opportunities for manufacturing, advanced technologies, and a wide range of industrial-related commercial activities such as warehouse and distribution.</p>	<p>3 Types of Industrial Zones:</p> <ul style="list-style-type: none"> • General Industrial Zones (IG1 & IG2)- full range of industrial uses and limited commercial • Industrial Buffer Zones (IB) - provide transition from industrial to residential/mixed residential commercial- incl. widest range of uses. Required performance standards to separate uses • Industrial Commercial Zones (IC) – Promote biz development, light manufacturing. + R&D. Required development standards to mitigate conflicts. <p>Manufacturing Center Overlay Zone (MCO) – established as rezoning applications on existing industrial areas to encourage industry, esp. tech/research.</p> <p>Other mechanisms include landscaping, setback and street standards.</p>	<p>Retain and expand Seattle's manufacturing and maritime sectors:</p> <ul style="list-style-type: none"> • Provide user-friendly permitting for industrial users. • Improve transportation to keep freight moving. • Industrial Brownfield cleanup programs.

<p>St. Louis</p>	<p>Need to repopulate/grow city</p> <p>Strategic Land Use Plan (January 2005)</p> <p>86 Million sq. ft., Vacancy Rate: 5%</p> <p>Approx 20% of City M-zoned</p>		<p>New 'Strategic Land Use Plan' authorized in 2005; incorporates neighborhood-level planning into broader land use categories.</p>	<p>SLDC targets smaller industrial parcels for strategic assembly into modern-sized parcels fit for redevelopment</p>
<p>Toronto</p>	<p>Residential development pressure & declining manufacturing sector</p> <p>8% vacancy</p>	<p>Employment Areas (Land Use Designation): Protect and promote economic activity in order to attract new and expand existing employment clusters that are key to Toronto's competitive advantage:</p> <ul style="list-style-type: none"> • Develop quality Employment Districts that are globally competitive locations and offer a wide choice of sites for new business; • Nurture Toronto's diverse economic base; • Provide a range of employment opportunities for Toronto residents that can be reached by means other than the private automobile. <p>Employment Districts – Large districts comprised exclusively of Employment Areas land use designation. Can accommodate substantial growth in jobs and met the needs of some of the City's key economic clusters.</p> <ul style="list-style-type: none"> • Ex - Manufacturing, warehousing and product assembly; Commercial office parks. 	<p>Uses: Offices, manufacturing, warehousing, distribution, research and development facilities, utilities, media facilities, parks, hotels, retail outlets ancillary to the preceding uses and restaurants and small scale stores and services that serve area businesses and workers.</p> <ul style="list-style-type: none"> • Places of worship, recreation and entertainment facilities, business and trade schools and branches of community colleges or universities may locate only on major streets. • Big box restricted to area boundaries (intersection with other zones) by exception only. • Residential not permitted. 	<p>Employment Districts the focus of regional economic strategy:</p> <ul style="list-style-type: none"> • Investments in infrastructure • Marketing <p>"Live/Work" is considered residential and not permitted in Employment Areas; "Artist Live/Work" is considered non-residential, must be affordable and is permitted in Employment Areas</p>
<p>Vancouver</p>	<p>Industrial Lands Strategy / 1995 & Metropolitan Core Jobs and Economy Land Use Plan / 2005</p> <p>1.4% Vacancy</p>	<p>Retain industrial land for port and river-related industry, and for industries that employ city workers and/or serve city businesses and residents.</p>	<p>Increase allowable FAR for service industrial. Create new definitions (e.g. software manufacturing, artist studio, Class A+B). Increase allowable accessory office space. Reduce height and bulk provisions. Replace heavy industrial with light industrial. Facilitate change-of-use in inner city neighborhoods. For conditional change of use, proposed development should not increase land values of surrounding industrial.</p>	<p>Vancouver's I-3 zone allows Information Technology office uses outright, and other offices only through a public review process.</p> <p>Not under review: Jobs/economy areas where land use policy will not be reviewed by this study; e.g., local mixed use districts with housing above commercial; recently planned areas; and the Port.</p>

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