ECONOMIC & HOUSING OPPORTUNITIES (ECHO)
PHASE II

February 2014
The Grand Boulevard Initiative (GBI) is a voluntary, regional collaboration of cities, counties, agencies, and advocates who share a vision for the transformation of the 43-mile El Camino Real Corridor. The GBI has adopted ten guiding principles to “achieve its full potential as a place for residents to work, live, shop and play, creating links between communities that promote walking and transit and an improved and meaningful quality of life.” The Guiding Principles emphasize targeting future infill development opportunities along the Corridor, creating lively mixed-use environments, and improving multimodal transportation options—all while preserving the unique character of each El Camino Real community.

The GBI is led by a Task Force consisting of representatives from local city governments, regional and state agencies, non-profit organizations, and private entities. The Task Force is supported by a Working Committee, made up of representatives from local and regional agencies, which directs research and technical assistance and provides recommendations for adoption by the Task Force. The GBI staff, Task Force, and Working Committee have conducted ongoing outreach to coordinate member activities and encourage “bottom-up” efforts from individual agencies, jurisdictions, private developers, and community groups.

**Acknowledgements**

Economic and Housing Opportunities Assessment (ECHO) Phase II was funded by a U.S. Department of Transportation TIGER II Planning Grant, the San Mateo County Transit District, the City/County Association of Governments of San Mateo, and the Santa Clara Valley Transportation Authority, and received city staff support from the four selected case study cities.

This material is based upon work supported by the Federal Transit Administration under Cooperative Agreement No. CA-79-1000. Any opinions, findings, and conclusions or recommendations expressed in this publication are those of the Author(s) and do not necessarily reflect the view of the Federal Transit Administration.
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Executive Summary

The purpose of the Economic and Housing Opportunities (ECHO) Assessment is to examine the potential to transform El Camino Real into a vibrant, multimodal corridor through better integration of land use and transportation. The El Camino Real Corridor (“the Corridor”) extends 43 miles along the San Francisco Peninsula, linking commercial districts and residential neighborhoods from Daly City (where it is known as Mission Street) to San Jose (where it is named The Alameda). The ECHO project is sponsored by the Grand Boulevard Initiative (GBI), a regional collaboration of the cities, counties, and local and regional agencies dedicated to revitalizing El Camino Real through infill development and multimodal transportation investments that improve the performance, safety, and aesthetics of the Corridor – defined as the half-mile radius on either side of El Camino Real.

In 2010, Strategic Economics and Freedman Tung + Sasaki completed the first phase of the study, ECHO I, which assessed the economic benefits of focusing future development along the Corridor, and provided building prototypes and renderings to illustrate the impact of change. In this second phase, ECHO II, the Strategic Economics consultant team (including subconsultants Freedman Tung + Sasaki and Van Meter Williams Pollack) focused on addressing the common challenges facing communities in attracting new infill development along the Corridor.

To ensure that the analysis reflected the variety of conditions found on the Corridor, GBI selected four representative segments of the El Camino Real Corridor in Mountain View, Daly City, South San Francisco, and Belmont. For each case study location, the consultant team worked closely with GBI and city staff to conduct an extensive technical analysis and craft tailored recommendations (see summary at right). This report discusses the findings from each of the case studies, describes the challenges to implementing the GBI vision, and synthesizes the implementation strategies into a “toolkit” aimed at helping all GBI cities move forward with infill development in the El Camino Real Corridor.

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Challenges

Although conditions vary significantly throughout the Corridor, the ECHO II case study analysis illustrated that there are common challenges for communities planning for infill development and revitalization in the El Camino Real Corridor. These challenges include:

1. Auto-Oriented Character:
   Much of El Camino Real is characterized by busy traffic, limited pedestrian facilities, and auto-oriented, strip development pattern. These conditions discourage walking and bicycling, and in some cases, create negative perceptions about the Corridor as a place to work, live, and shop. There is concern, particularly among policymakers, that the Corridor is not attractive to new residents and businesses.
EXECUTIVE SUMMARY

2. Scarcity of Developable Parcels: A review of recently built projects shows that most of the development in the Corridor is taking place on sites that are at least one to two acres in size. However, the majority of the parcels on the Corridor are small, shallow, and/or irregularly shaped, and few are under consolidated ownership. In some segments of the Corridor, the narrow El Camino Real parcels are backed by single-family housing. All of these parcel characteristics pose challenges for new development.

3. Evolving Role of Retail: Retail has historically been a dominant land use on El Camino Real. However, changes in the national retail landscape are influencing the types of new retail development that communities can expect in the future. At the same time, some of the aging retail space along the Corridor no longer conforms to the preferences of modern retailers, who typically look for wide storefronts with high ceilings and appealing, highly visible signage.

4. Mismatch between Land Use Policies and Market Conditions: Attracting new development to the El Camino Real Corridor is highly dependent on two key elements: a real estate market that supports the desired development, and land use regulations that allow financially feasible building types. However, while many jurisdictions have embraced the principle of higher intensity development in the Corridor, local zoning regulations are often inconsistent with the types of projects that can be built given local real estate market conditions and development feasibility factors.

5. Limited Public Resources: Many of the challenges discussed above are intensified by limited public resources for local governments to facilitate development. The dissolution of redevelopment agencies in 2012 eliminated some of the most important tools cities had to fund streetscape improvements, assemble land, finance parking, and fund affordable housing. Private development can help fund some of the streetscape and other infrastructure improvements needed in the Corridor. However, there are limitations on the role that development can play in funding these types of projects.

Strategies & Tools for Implementation

The case study analysis led to a set of concrete tools and actions that cities and counties in the El Camino Real Corridor can take to facilitate infill development. The tools and actions are organized into three strategies:

A. Plan for Vibrant Activity Nodes: By focusing public investments and higher intensity development in concentrated activity nodes - defined as compact clusters of retail, housing, and/or employment uses concentrated within a walkable radius (a quarter- to half-mile, or five- to ten-minute walk) - cities can support successful mixed-use districts, promote pedestrian activity and transit use, and deploy public resources more efficiently. This strategy provides tools that communities can use to plan for and support the development of vibrant activity nodes.

Tools:

1. Identify key activity nodes early in the planning process.
2. Plan for the Corridor, not just the street.
3. Support existing retail nodes.
4. Focus new retail development in
identified activity nodes and allow developers to build other ground floor uses outside of key nodes.

Planning for Vibrant Activity Nodes

Successful mixed-use, multi-modal places are characterized by concentrated retail, housing, and/or employment uses, complemented by a pedestrian-friendly street environment, well-managed parking, and good transit access within an easy walking radius (typically a quarter- to half-mile radius, or five to ten minutes). Clustering higher-intensity uses into such “activity nodes” can:

Support successful mixed-use districts: Clustering development into mixed-use nodes enables synergies among different uses. For example, retailers can attract more customers by locating near other shops and restaurants. A vibrant retail scene can make a district more attractive for housing and employment uses, which in turn generate spending power to help support local retail.

Encourage pedestrian activity and transit use: Concentrating different uses within easy walking distance ensures that residents and workers can meet their daily needs on foot, while visitors can arrive by transit, bike, or car and walk to multiple destinations. Cities can further encourage walking and transit use by targeting streetscape and other improvements within the quarter-to half-mile radius within which most people are willing to walk.

Save the city money: A nodal development pattern allows the city to target its investments in place-making and infrastructure improvements to smaller geographies, rather than spreading improvements out all along the Corridor.

5. Ensure that key opportunity sites are developed in a manner consistent with the vision for the Corridor.

6. Implement a comprehensive, district-based parking management strategy.

B. Align Land Use Regulations with Market and Physical Conditions:

Zoning, parking, and other regulations should enable new investment to occur in the short-term, while supporting the long-term vision for transformation. This strategy presents some of the key regulatory tools that emerged from the case studies.

Tools:

1. Develop geographically specific goals and policies for sub-districts within the Corridor.

2. Change height, floor area ratio (FAR), and other zoning requirements to allow financially feasible densities.

3. Allow residential and mixed-use development by right in appropriate locations.

4. Provide flexibility on potential ground floor uses outside of activity nodes.

5. Allow townhouse development in areas with shallow lots and a supportive street environment.

6. Enact sliding residential density scale requirements that allow developers to build at higher densities on larger lots.

7. Reduce on-site parking requirements for housing, retail, and other new development in appropriate locations.

8. On small sites, eliminate parking requirements for ground floor uses.

9. Provide flexibility in community benefit requirements for small lots.
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C. Coordinate Public and Private Investment to Create Walkable Places and Support Desired Development:
Creating a high-quality environment is critical to making the El Camino Real Corridor attractive and functional for existing and new residents, encouraging developers to invest in the Corridor, and facilitating walking, bicycling, and transit ridership. This strategy presents tools for coordinating public and private investments in street, sidewalk, landscaping, and other improvements in order to create walkable places, facilitate development, and ensure that scarce public resources are deployed for maximum impact.

Tools:
1. Develop an area-wide plan for complete streets improvements.
2. Implement design guidelines and development standards to ensure that new development supports a pedestrian-friendly street environment.
3. Look for opportunities to leverage private sector investments.
4. Target publicly funded improvements to activity nodes and other high-priority locations.

I. INTRODUCTION

As a state highway and major arterial extending 43 miles from Daly City to San Jose, the El Camino Real Corridor ("the Corridor") has long been a critical transportation asset in the San Francisco Peninsula, connecting employment centers, commercial districts, and residential neighborhoods. El Camino Real was the region’s preeminent north-south route through the first half of the 20th century. Over time, however, the Corridor has increasingly begun to serve as a local street for the communities that it connects, and less as a state highway. The Corridor is extremely well-served by transit, including 15 rail stations and multiple bus routes provided by San Mateo County Transit (SamTrans) and the Santa Clara Valley Transportation Authority (VTA). As the road must increasingly accommodate different users and modes of travel, communities are looking for ways to make El Camino Real more aesthetically pleasing and safer for pedestrians, cyclists, and transit riders. At the same time, a regional consensus has developed around targeting a significant share of the region’s projected population growth along the El Camino Real Corridor in order to expand housing and transportation options and reduce greenhouse gas emissions. The Bay Area’s first Sustainable Communities Strategy, Plan Bay Area, forecasts that the Corridor - defined as the half-mile buffer on either side of El Camino Real - will accommodate 19 percent of the new households and 17 percent of the new jobs projected for San Mateo and Santa Clara Counties between 2010 and 2040.¹

The cities, counties, transit agencies, and regional agencies with jurisdiction over different parts of the El Camino Real Corridor formed the Grand Boulevard Initiative (GBI) in order to achieve the Corridor’s “full potential as a place for residents to work,

Figure 1. The ECHO II study focused on addressing the common barriers to new infill development in the El Camino Real Corridor.
Images: Strategic Economics, 2013 (left); GBI, 2008 (right).

INTRODUCTION

live, shop and play, creating links between communities that promote walking and transit and an improved and meaningful quality of life.” GBI is a voluntary collaboration that, for the first time, brings together all of the agencies with responsibility for the condition, use, and performance of the street. In 2007, GBI adopted ten Guiding Principles that elaborate on the communities’ vision for the Corridor (Figure 2). Communities in the El Camino Real Corridor have embraced the GBI’s vision and incorporated elements from the Guiding Principles in local land use plans and policies. However, many communities have also found that a significant gap exists between current conditions on the Corridor and their long-term plans for transformation. In order to further advance the Grand Boulevard vision, the GBI sponsored the Economic and Housing Opportunities Assessment (ECHO), a study examining the potential for transformation.

In Phase I of ECHO, completed in 2010, Strategic Economics and Freedman Tung + Sasaki demonstrated the fiscal and economic benefits of focusing future development along the Corridor (Figure 3), and provided illustrations to help communities visualize the impacts of change. While ECHO I showed substantial benefits to revitalizing the Corridor, the report also identified physical, economic, and regulatory constraints to

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**Figure 2. GBI’s Ten Guiding Principles**

1. Target housing and job growth in strategic areas along the Corridor.
2. Encourage compact mixed-use development and high-quality urban design and construction.
3. Create a pedestrian-oriented environment and improve streetscapes, ensuring full access to and between public areas and private developments.
4. Develop a balanced multimodal corridor to maintain and improve mobility of people and vehicles along the Corridor.
5. Manage parking assets.
6. Provide vibrant public spaces and gathering places.
7. Preserve and accentuate unique and desirable community character and the existing quality of life in adjacent neighborhoods.
8. Improve safety and public health.
9. Strengthen pedestrian and bicycle connections with the Corridor.
10. Pursue environmentally sustainable and economically viable development patterns.

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**Figure 3. New (annual) municipal revenues associated with converting low-density, low-performing retail sites to higher-intensity uses.**

implementation at the local level. In order to explore strategies for removing barriers to implementation of the vision, GBI applied for and received a TIGER II planning grant from the U.S. Department of Transportation. The grant funded three separate but interrelated projects aimed at addressing different challenges in the Corridor: Designing El Camino Real as a Complete Street, Economic and Housing Opportunities Study Phase II (ECHO II), and Infrastructure Needs Assessment and Financing Strategy.

This study, ECHO II, is focused on addressing the common challenges facing communities in attracting and accommodating new infill development in the Corridor. To ensure that the analysis reflected the variety of conditions found on the Corridor, the GBI team selected four representative segments of the El Camino Real Corridor to serve as case studies. The ECHO II consultant team (including Strategic Economics, Freedman Tung + Sasaki, and Van Meter Williams Pollack) worked closely with GBI and city staff members to conduct analysis and craft recommendations tailored to the physical, market, and regulatory contexts of each case study location. This report describes the findings from each of the case studies and synthesizes the implementation strategies into a “toolkit” that is aimed at helping all GBI cities move forward with infill development in the El Camino Real Corridor.
Figure 4. ECHO II case study locations.

Source: Strategic Economics, 2013.
II. CASE STUDIES

In order to create a common basis for understanding the barriers to infill development in the El Camino Real Corridor and develop strategies for overcoming those barriers, the GBI team selected four case study areas for analysis. The case studies were selected through a competitive process, with GBI member cities and counties asked to propose potential case study areas located within the half-mile El Camino Real Corridor. The GBI team evaluated the applications based on the availability of city/county staff to support the project, the level of readiness for infill development, the variety of implementation challenges found in the proposed study area, and potential for public outreach. Based on these criteria, segments of the Corridor were selected in four cities: Belmont, Daly City, Mountain View, and South San Francisco (Figure 4).

For each case study, the Strategic Economics consultant team, including sub-consultants Freedman Tung + Sasaki (FTS) and Van Meter Williams Pollack (VMWP), worked with GBI and city staff to devise a tailored scope of work that would address the unique challenges and objectives of each place, and provide city staff and decision-makers with practical guidance for implementation. The following sections describe the conditions found in each case study segment, the technical approach, and the key findings.

Belmont

The Belmont case study focused on a 60-acre area at the intersection of El Camino Real and Ralston Ave (Figure 5), which the city has identified as its downtown core. Unlike many other Peninsula communities, Belmont does not have a historic “main street” or a cohesive downtown district. The study area consists primarily of several small shopping centers, with stores facing onto large surface parking lots rather than sidewalks. This auto-oriented format contributes to a scattered pattern of retail activity, with no clear focal point to attract people and create a sense of destination. The study area includes a Caltrain Station, but ridership at Belmont Station is currently too low to provide a significant influx of pedestrians. Heavy, fast-moving traffic on Ralston Avenue and El Camino Real creates a barrier that divides the study area. The study area exemplifies other challenges faced by many GBI communities, such as fragmented parcel
CASE STUDIES

Over the past decade, the City of Belmont has clarified its vision for the downtown and launched several planning initiatives. The city’s Vision Statement, adopted in 2003, established the importance of creating a town center that provides community gathering places as well as local shops and restaurants. Since 2007, the city’s economic development activities in the downtown area have focused on four target development sites: Firehouse Square, Emmett’s Plaza, Belmont Station, and Hill Street. Prior to its dissolution, the Belmont Redevelopment Agency was actively involved in acquiring land, assembling properties and meeting with potential developers regarding these sites. These properties are now owned by the City of Belmont as the Successor Agency (Figure 6). To aid its efforts to attract high-quality, mixed-use development in the downtown, the City of Belmont is currently in the process of crafting a new Belmont Village Element of the General Plan and establishing Belmont Village Zoning (BVZ) development standards.

The case study analysis consisted of the following elements:

1. An existing conditions analysis that examined existing development patterns and opportunity sites, identified strengths and challenges of the study area, and defined focus areas for implementation.
2. A real estate market study that assessed the supply and demand for retail, residential, and office uses in the study area.
3. A policy audit of the draft Belmont Village Zoning that evaluated the effectiveness of the development standards in implement-

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**Figure 6. The Dissolution of Redevelopment in California**

Redevelopment has historically played an important role in facilitating infill development and economic revitalization in many California communities. Within their designated project areas, redevelopment agencies could collect tax increment financing (TIF), assemble land, and fund affordable housing, infrastructure, economic development programs, and other projects and programs. In 2012, the State of California eliminated redevelopment agencies as part of a strategy to balance the state budget. Much of the land and other assets owned by the agencies reverted to cities in their capacity as successor agencies. Several of the case study areas, including Belmont and South San Francisco, are former redevelopment project areas and were affected by the state’s action. Chapter III discusses the impacts of redevelopment’s dissolution in more detail.
Given the city’s vision and goals for the study area.

Overall, the case study found that there are excellent opportunities for new development in the study area, and that the City of Belmont can best take advantage of these opportunities through better alignment between city policy and market conditions. Although existing physical and financial constraints require an incremental approach to improving Belmont’s downtown, the city has clear opportunities to strengthen existing retail activity, attract new development and create a more pedestrian-friendly environment. Key findings from the case study analysis are highlighted below.

**Belmont’s market opportunities are determined in large part by the city’s location and identity within the surrounding region.** Like many other communities on the San Francisco Peninsula, Belmont benefits from proximity to Silicon Valley jobs. The city is primarily a residential community, providing an appealing home base for professionals and families seeking safe neighborhoods, natural surroundings and a small town character. In general, demand for housing is strong in Belmont and throughout the region. Although Belmont’s current housing stock is primarily detached single-family homes, demographics suggest there is demand for compact housing in proximity to retail and transit from households including young professionals, downsizing Baby Boomers, and singles.

**The Belmont community has reached consensus on the overall qualities it desires for its downtown, but establishing greater differentiation between downtown sub-districts would help to focus activity and guide place-making improvements.** The Belmont Village Zoning districts provide an excellent starting point for defining the different types of neighborhoods that comprise the downtown, but the development standards for different sub-districts are quite similar. For example, the pedestrian retail core is likely to have a different character than transitional residential neighborhoods and corridor commercial development. Developing more specific, highly differentiated building types and streetscape guidelines for different parts of the study area will help to channel activity-generating uses into the downtown core and provide clarity for public and private investments in the downtown.

**Belmont’s downtown shopping district can be enhanced by building on existing momentum and making improvements within the current retail footprint.** Although the market is unlikely to support a significant increase in retail square footage, the city has an opportunity to work with businesses to strategically upgrade and/or reorganize downtown retail in a way that would increase the quality and performance of the downtown shopping experience. This can be accomplished by attracting new businesses to the pedestrian core, making strategic place-making investments, and providing incentives for private investment in
CASE STUDIES

locations that would collectively transform the downtown shopping environment. To create a concentrated node of activity, the consultant team recommended that the city focus new retail development where there is existing momentum, in a two-block area between Ralston Avenue and O’Neill Avenue, on the west side of El Camino Real.

The addition of housing units to the study area would enliven the downtown core. Given the strong residential market throughout the region, adding housing to the study area is a promising strategy to build a lively downtown neighborhood. The city is already home to a high share of single-person households, couples without children and individuals over 65; these are household types that are likely to value housing near transit and amenities. Downtown residents would contribute significantly to pedestrian activity and support local businesses. There are multiple locations throughout the study area that would be appropriate for residential development and that are too far from the intersection of Ralston Avenue and El Camino Real to be strong locations for commercial uses such as retail.

Consolidation of parking in the downtown core may free up additional sites for development. Privately owned on-site parking in the study area is currently distributed throughout multiple lots. While convenient parking is important to retail businesses, both the private parking lots and public on-street parking appear to be underutilized at certain times of day. Creating a parking district with shared parking for downtown businesses may enable more efficient use of parking spaces, while enabling property owners to redevelop their properties or infill existing parking lots with other more valuable uses. Consolidation of parking would also make it easier for shoppers to “park once” and visit multiple destinations, increasing pedestrian activity.

Daly City

The Daly City case study focused on the segment of Mission Street between the San Francisco border and School Street (Figure 9). Mission Street - which becomes El Camino Real just south of the Daly City border - serves as Daly City’s major neighborhood-serving retail corridor. The city’s General Plan calls for the revitalization of the Corridor as an urban, walkable, mixed-use neighborhood that provides a positive and cohesive identity for the city. The city intends to rezone the Mission Street Corridor in the near future in order to implement the General Plan’s vision for the Corridor. The

“Mission Street . . . will become [a] vibrant urban [street] with a unique mix of uses and enhanced public improvements.”

--Envision Daly City: A Framework for the Future

Corridor also overlaps with a Priority Development Area - one of the locally identified areas designed to accommodate population
and employment growth - in MTC and ABAG’s Plan Bay Area.

The study area benefits from excellent transit service - Mission Street links the Colma and Daly City BART stations and served by MUNI and SamTrans bus lines. The city has recently invested in a new community center and extensive streetscape improvements in the “Top of the Hill” area at the intersection with John Daly Boulevard, and is planning to install additional improvements throughout the remainder of the study area (between Alp and School Streets). The Alp to School Street segment was the subject of a Complete Streets design case study funded under GBI’s TIGER II grant. Mission Street has also attracted some market-rate and affordable housing development in recent years. At the same time, the study area exemplifies some of the common barriers that are found in the El Camino Real Corridor, including small, shallow parcels, fragmented ownership, and an auto-oriented strip development pattern with retail diffused along the length of the Corridor.

The ECHO II case study in Daly City included four components:

1. Existing conditions analysis, examining patterns of development, land ownership, assessed values, retail sales, and parcel size along the Corridor;
2. Market study, analyzing the potential for new housing and retail development;
3. Potential for change analysis, evaluating where along the Corridor change is most likely to occur;
4. Building prototype and financial feasibility analysis, identifying the economic viability of different types of development projects and potential regulatory changes or incentives that the city could provide in order to facilitate desired development; and
5. Fiscal impact analysis, assessing the impact of new development on Mission Street on the city’s General Fund.

Key findings from the analysis include:

The city can accelerate development by adjusting zoning regulations. Three- to five-story apartment or condominium buildings and townhouses are the types of residential development that are most likely to occur in the Corridor. However, in order for new multi-family residential or mixed-use development to be feasible on the small lots avail-
Within the study area, housing prices will need to continue to rise. The city could help accelerate new development by adjusting height limits and residential parking ratios to permit higher densities, exempting small amounts of ground floor retail from providing parking, and allowing ground floor residential in appropriate locations.

Rather than attracting large-scale retailers to Mission Street, the city’s efforts should emphasize improving the existing retail nodes at Top of the Hill and Mission and Market. Existing retail and transit nodes and surrounding properties are the areas with the most potential for change along the Corridor. Improving the performance of existing businesses, upgrading older retail space (e.g., with façade and other tenant improvements), and filling vacancies will assist in creating the type of environment that will attract new residents and businesses to these nodes. The city can help build momentum for this type of incremental reinvestment by continuing to support existing businesses and providing assistance to property owners to invest in their buildings.

New residential and mixed-use development is most likely to locate at the Corridor’s key nodes. The two nodes with the nearest term potential for new development - the Top of the Hill area and the Mission and Market Street intersection - are each located near a BART station. Top of the Hill has attracted recent public and private investment, while the Market Street area has the most developable sites in terms of size and configuration.

The new housing and mixed-use development projected for the Corridor is estimated to generate net fiscal benefits to the city’s General Fund. The development of new housing and mixed-use projects on Mission Street generates net new annual revenues (i.e., new revenues in excess of new costs) of $1.1 million to the city’s General Fund at full build out in 2040. At the site level, replacing single-use retail properties with higher-intensity residential or mixed-use development is also estimated to generate net fiscal benefits for the city.
Mountain View

The Mountain View case study area stretches along El Camino Real between Mariposa and Calderon Avenues (Figure 13). It includes the intersection of El Camino Real with Castro Street, downtown Mountain View’s “Main Street.” The study area benefits from its central location within Silicon Valley and the City of Mountain View. Silicon Valley’s rapidly expanding high-tech sector has driven rising real estate and rental prices, falling vacancy rates, and new development throughout the region, particularly in the office and residential markets. Downtown Mountain View in particular is nationally recognized as a growing hub for start-ups and other tech firms, and has a high concentration of restaurants and other urban amenities. Developers and real estate brokers consider the study area’s access to Castro Street, the downtown Mountain View Caltrain Station – which is located within a 15-20 minute walk of most of the study area - and the proposed El Camino Real bus rapid transit line to be valuable assets.

In contrast to downtown, the study area is dominated by low-density strip retail development characteristic of many parts of El Camino Real, along with several hotels and motels and a few two- to four-story office buildings. Similar to other parts of the Corridor, the street is characterized by high traffic volumes, limited pedestrian amenities, inconsistent building setbacks and landscaping, and a prevalence of parking lots adjacent to the public right-of-way. Several new three- to five-story apartment buildings are under construction or in the entitlement process on adjacent segments of El Camino Real in Mountain View, and a few of the larger parcels in the study area have also attracted interest from developers. However, many properties have not seen significant reinvestment for years. The potential for new development or other economic activity in the Corridor is constrained by the small, shallow parcels, some of which are no more than 75 feet deep.

Mountain View’s 2030 General Plan designates El Camino Real as one of several change areas where the city’s housing growth

“El Camino Real becomes a revitalized grand boulevard with a diverse mix of commercial and residential uses and public improvements.”

--Mountain View’s 2030 General Plan
will be focused, and envisions a revitalized grand boulevard with a diverse mix of commercial and residential uses and public improvements. The city is in the process of formulating a new El Camino Real Precise Plan that will reflect the General Plan’s goals for the Corridor.

The Mountain View case study included five main tasks:

1. Existing conditions analysis, examining patterns of development, land ownership, assessed values, and parcel sizes in the study area and evaluating key differences between the study area and other segments of the Corridor within Mountain View;
2. Interviews with developers and property owners about the barriers to change in the Corridor;
3. Market study, analyzing the potential for new housing, office, hotel, and retail development;
4. Building prototype and financial feasibility analysis, testing the financial feasibility of residential, commercial, and mixed-use development at a range of different intensities; and
5. Parking analysis, which included an analysis of the study area’s existing on-street parking capacity and case studies of parking management strategies in three other GBI communities (Redwood City, Menlo Park, and Burlingame).

Overall, the case study analysis revealed that while the study area has strong market potential to attract new development, it is primarily constrained by the size and dimensions of the available parcels on this segment of the Corridor. Some of the main findings from the analysis include:

Fragmented ownership and the small and shallow lot configurations in the study area are a major impediment to new investment and development (Figure 13). Many of the existing retail sites do not have sufficient on-site parking to meet current parking standards. As a result, property owners often need to ask the city for variances in order to accommodate a new tenant or make

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Figure 13. Ownership patterns in the Mountain View study area; based on owner names recorded in county assessor’s data.

Source: City of Mountain View, 2009; Santa Clara County Assessor’s Office, 2011; Strategic Economics, 2012.
improvements. For new development, the need to coordinate with multiple property owners to assemble a “developable” parcel is a major hurdle, while the small and shallow lots pose both physical design challenges and increase the per-square foot cost of construction. The current floor area ratio (FAR) and parking requirements in the study area are particularly challenging for small sites. The ongoing El Camino Real Precise Plan process offers an opportunity for the city to revisit zoning and parking requirements.

Aggregating parcels on El Camino Real with parcels directly behind the Corridor can help enable development. The aggregation of shallow frontage parcels with those immediately to the rear creates deeper sites that improve financial feasibility, facilitating more efficient building types that can accommodate better vehicle access and parking, and creating cost efficiencies for the developer. The city may be able to incentivize parcel aggregation by allowing developers to build at higher densities on larger parcels.

Improvements to the public realm can help increase the attractiveness of more challenging properties for existing residents and businesses, as well as for new development. The quality of the pedestrian experience is critical for facilitating walking, bicycling, and transit ridership, the success of local retail, and the attractiveness of the Corridor for new housing, office, and other development. Improvements to the public realm, such as wider sidewalks, street trees, and median landscaping, will be particularly important for enabling development on small sites, which may not have space for significant setbacks and on-site improvements to buffer buildings from the street.

Development and streetscape standards should recognize the unique characteristics of the different nodes and segments within the Corridor. The existing development pattern varies significantly in different parts of the El Camino Real Corridor in Mountain View (Figure 14). The El Camino Real Precise Plan represents an opportunity to establish different standards for distinct parts of the Corridor. Establishing specific land use regulations and policies for the various nodes and segments can encourage new investment by clarifying the city’s expectations for development projects on El Camino Real, providing more certainty to property owners and developers.

Managing parking while respecting the city’s urban design goals will be critical to ensuring the success of existing and future retail uses on the Corridor. Current on-site parking requirements limit commercial development on small one-third acre sites (15,000 square feet) to the type of low-intensity, strip development that is currently found on the Corridor, while mixed-use development on sites of this size cannot physically accommodate the on-site parking required for ground floor retail. For mixed-use development on slightly larger sites (two-thirds of an acre, or 30,000 square feet), on-site parking for ground floor retail acts as a drag on financial feasibility. At the same time, however, retail brokers interviewed for the market study cautioned that retail businesses on El Camino Real often

Figure 14. Nodes and segments on the El Camino Real Corridor in Mountain View.
Source: Google, 2012; Freedman Tung + Sasaki 2009.
rely on drive-by traffic and require parking spaces that are visible from the street in order to attract customers. Given these findings, parking management strategies will be key to enabling new development while still providing adequate parking to meet demand. Potential strategies include reducing or eliminating parking requirements for small increments of ground floor retail, reducing parking ratios for other types of development, implementing in-lieu fees to allow for the provision of off-site parking, and managing demand for publicly owned parking through time limits, meters, and other strategies.

South San Francisco

The South San Francisco case study focuses on the development potential of 10 acres of publicly owned vacant and underutilized property located northeast of El Camino Real (Figure 15). This opportunity site forms the core of a larger 98-acre planning area defined in the city’s 2011 El Camino Real/Chestnut Avenue Area Plan, which establishes a compelling long-term vision for the neighborhood as a new mixed-use district with residential, retail, and civic uses at a range of densities, along with public plazas and open space. The publicly owned parcels were originally purchased by the South San Francisco Redevelopment Agency with the goal of facilitating development in an area that faces a variety of implementation challenges. Following the dissolution of the Redevelopment Agency in 2012, the City of South San Francisco, as the Successor Agency, is responsible for developing a short-term strategy for these properties. This could consist of the sale of individual properties, or the city could enter into a master development agreement with a single developer.

The case study properties present a unique development opportunity on El Camino Real, consisting of large, underutilized parcels with consolidated ownership, in proximity to a BART station. Notwithstanding these advantages, the parcels also face significant implementation challenges. There is a sharp slope downwards from El Camino Real toward Mission Road, with a grade change of up to 50 feet in certain locations. The parcels are also oddly shaped due to the BART easement and the Colma Creek Channel, which both cut through the site. Building foundations are not allowed above the BART tunnel due to structural constraints, so the easement has been developed as a linear park that runs through the center of the case study area (Figures 15 and 16). Furthermore, in the absence of redevelopment, the City of South San Francisco is faced with new questions about how to facilitate development on
these properties within a short time frame. The goal of the case study was to understand the range of development options for the study area and make recommendations that would help the city realize the Plan’s vision and maximize the value of the properties. The ECHO II consultant team conducted a two part analysis:

1. A market study, to understand the short-term potential for development in the study area.
2. A development feasibility study, exploring options for phased development at the site, and testing the feasibility of a development program that would be consistent with a master-developed approach to the area.

Key findings from the analysis are listed below:

**In the short-to mid-term, the study area is well-positioned for residential development with supporting commercial uses.** There is strong demand for new residential development in South San Francisco and the broader northern San Mateo County area. Employment growth in the Silicon Valley and San Francisco is a major driver of demand for housing in the market area. The study area offers excellent access to regional transit and freeways, and is an ideal location for professionals seeking a convenient commute to job centers in San Francisco or on the Peninsula.

Four- to six-story wood-frame apartment buildings are financially feasible in the near term, and can contribute to the vision of a high-density neighborhood in the El Camino Real/Chestnut Area. The Area Plan envisioned high-rise buildings at the northern end of the study area in the later phases, assuming that the market will mature over time to support this more expensive construction type. However, the analysis found that lower-cost wood-frame buildings (3-5 stories of residential units over podium parking) are much more likely to be feasible, and can achieve similar densities of 95 units per acre (Figure 17).

**To attract prospective households and businesses, it will be important to develop amenities that create a node of activity in or near the focus area.** Residential and office brokers emphasized the importance of pedestrian-oriented retail, restaurants and activities to the success of new projects. While there are several grocery stores and other types of retail near the BART Station and near the intersection of El Camino Real and Chestnut Avenue, the existing development surrounding the study area currently lacks the walkable form and critical mass of retail to create a hub of activity. Place-making improvements and other such amenities are more likely to be provided as part of a larger project than as incremental development.

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Figure 16. The Centennial Way Linear Park, a dedicated bikeway and linear park, runs through the case study area over the BART tunnel, connecting the South San Francisco and San Bruno BART stations.

A coordinated, master developer approach can maximize the value of the publicly owned parcels and result in development that is consistent with the El Camino Real/Chestnut Avenue Area Plan. With the dissolution of Redevelopment, there may be pressure to sell off the individual parcels that are the most developable. However, this would severely limit the ability to develop the adjacent parcels that - due to their size, shape and access - would be difficult to develop on their own. A coordinated approach to all properties allows for more efficient overall site design and shared surface parking for retail uses, and a mixed-use development program that is consistent with the community vision for the area. It is also expected to result in a higher overall value of development on the combined properties.

The city can facilitate development of the study area through an RFP process and by entering into a development agreement with the chosen developer. A development agreement can be structured to allow some flexibility for the developer to respond to the market, while also providing terms that will be financially favorable for the city. The city may also be able to contribute some public resources to facilitate development, such as regional, state or federal grants for streetscape or other improvements that improve the attractiveness of the area for new development. For example, the city applied for and was selected as a case study for GBI's Complete Streets project, which developed streetscape designs along El Camino Real from McLellan Drive (north of the study area) to Chestnut Avenue/Westborough Boulevard (the southern boundary of the study area). The city has also received a $1 million One Bay Area Grant (OBAG) to construct the streetscape improvements immediately fronting the study area.

Figure 17. Mixed-use development scenario tested for the South San Francisco case study area. The analysis found that lower-cost wood-frame buildings (3-5 stories of residential units over podium parking) are much more likely to be feasible than high-rise development, and can achieve similar densities of 95 units per acre.

Source: VMWP, 2013.
III. CHALLENGES

Although conditions vary significantly throughout the Corridor, the ECHO II case study analysis illustrated that there are common challenges for communities planning for infill development and revitalization in the El Camino Real Corridor. The principal challenges identified in this chapter are: 1) the Corridor’s auto-oriented character; 2) a scarcity of developable parcels; 3) mismatches between market conditions and land use policies; 4) the evolving role of retail; and 5) limited public resources. Many of these challenges are also found in similar infill locations throughout the region. The following sections discuss each of these challenges in more detail.

1. Auto-Oriented Character

In keeping with El Camino Real’s function as a state highway and major arterial, the street has four to six lanes of traffic, limited pedestrian amenities, frequent median breaks, and inconsistent setbacks and landscaping. Because much of the development along the Corridor occurred during the 1950s and 1960s and prioritized auto access, the frontage in many places is dominated by strip shopping centers, other auto-oriented commercial uses, and surface parking lots. These conditions contribute to an unsafe, unappealing pedestrian environment and negatively affect the Corridor’s image as a place to work, live, and shop, making the Corridor less attractive for new businesses and development. For example, although the Mountain View case study area is within a short walking distance of downtown Mountain View’s vibrant Castro Street, business owners on El Camino Real have bemoaned the lack of pedestrian traffic. As one local developer noted, the auto-oriented nature of El Camino Real gives the perception that to get to Downtown Mountain View “you have to get into a car...and once you’re in a car, you might as well be one or two miles away from Castro Street.”


Figure 18. Multiple traffic lanes, strip shopping centers, and surface parking lots making it challenging to create compact, walkable districts in many parts of the Corridor.

The Corridor’s auto-oriented character creates particular challenges for residential development. Some developers have responded to El Camino Real’s multiple lanes and busy traffic by orienting residential buildings with their sides or rear turned to the street, or placing parking or fencing between the building and the street. These “fortified” buildings detract from the public realm. Other developers may be deterred altogether from building on El Camino Real by the perception that major arterials are not good locations for new residential investment.

## 2. Scarcity of Developable Parcels

A review of recently built projects shows that most of the development in the Corridor is taking place on sites that are at least one to two acres in size. However, the majority of the parcels on the Corridor are small, shallow, and/or irregularly shaped, and few are under consolidated ownership. In some segments of the Corridor, the narrow El Camino Real parcels are backed by single-family housing. All of these parcel characteristics pose challenges to developers due to the following factors:

- **Limited land area**: According to the case study analysis, for most locations on the Corridor, parcels must be at least one-third of an acre in size in order to accommodate higher density residential or mixed-use development. Parcels of less than one-third acre in size generally lack the land area to sufficiently accommodate buildings, associated parking, and vehicle access.

- **Higher per-square-foot development costs**: Building on small, infill parcels tends to be more expensive on a per-square-foot basis, because many of the costs associated with development are relatively fixed - that is, they do not scale proportionately with the size of new development.

- **Potential incompatibility with adjacent neighborhoods**: For parcels adjacent to single-family housing, developers often have to balance residents' concerns about building height with the need to maximize density in order to enable a financially feasible project.

- **Difficulty assembling sites**: Assembly of small parcels usually requires negotiations with multiple property owners, which can often be costly and time-consuming, posing a significant hurdle for new development.

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2 This includes both “soft” costs such as designing a project and navigating the entitlement process, and “hard” costs like site excavation, shoring, and building a parking podium.
3. Evolving Role of Retail

Retail has historically been a dominant land use on El Camino Real. Retailers value the high traffic volumes, visibility, affordable rents, and convenient access offered on the Corridor. Retail continues to play an important role in many communities by providing convenient goods and services, generating tax revenues, supporting local entrepreneurs, and - in some formats - contributing to pedestrian-friendly environments.

However, changes in the national retail landscape are influencing the amount, type, and location of new retail development that communities can expect in the future. In recent years, Internet sales revenues have grown three times faster than brick-and-mortar store revenues.¹ The growth in e-commerce has resulted in a sharp decline in demand for certain types of stores (music and video rentals, for example), and threatens the viability of book, computer, and consumer electronics stores. Across the country - and in many of the ECHO II cities - demand for new retail is now driven by stores that do not compete with e-commerce, including restaurants, grocery stores, personal services, and business services.² At the same time, some of the aging retail space along the Corridor no longer conforms to the preferences of modern retailers, who typically look for wide storefronts with high ceilings and appealing, highly visible signage, located in concentrated nodes with high traffic, good visibility, easy vehicle and pedestrian access, and near complementary uses.

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4. Mismatch between Land Use Policies and Market Conditions

Attracting new development to the El Camino Real Corridor is highly dependent on two key elements: a real estate market that supports the desired development, and land use regulations that allow financially feasible building types. However, while many jurisdictions have embraced the principle of higher intensity development in the Corridor, local zoning regulations are often inconsistent with the market and feasibility factors that influence what types of projects are built in specific locations. Examples of the misalignment between local land use policies and market conditions often found in the El Camino Real Corridor include:

- In some locations, zoning constrains revitalization. In some places on the Corridor, allowed heights or densities may be insufficient to achieve the density required to enable reuse or redevelopment of underutilized sites. This has the unintended consequence of discouraging reinvestment and transformation on the Corridor.

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² Ibid.

Figure 20. Outdated storefronts with low ceilings, small windows, and hard-to-see signage do not suit the needs of many modern retailers.

• There are a limited number of locations that can support high-rise development. Some communities have envisioned high-rise development on the Corridor, but there are few locations that can justify the high cost of these taller buildings. Three-to five-story, wood-frame construction is generally a more feasible building type that can also accommodate significant densities with lower heights. The cost of different building types is an important factor in planning for intensification of the Corridor.

• The amount of ground-floor retail zoned on the Corridor exceeds demand. Often, jurisdictions require ground-floor retail uses on much or all of El Camino Real and other commercial streets in the Corridor. However, market demand for retail uses is limited (partly due to the factors cited above). In many situations, the specific locations zoned for retail or mixed-use projects may not be desirable from a retailer’s perspective. Given the increasingly competitive retail environment, it will be important for cities to plan carefully for new retail and mixed-use development, being realistic about the amount of retail that can be supported and the types of locations that are most likely to attract tenants.

• On-site parking requirements drive up costs. The cost of providing on-site parking is a key driver of development feasibility. Building structured or underground parking is expensive - on the order of $40,000 to $50,000 per parking space - and the amount of parking included can determine whether or not a project is financially feasible. Providing a large amount of on-site parking can also be a challenge from a physical perspective, particularly on small parcels. For example, the Daly City and Mountain View case studies showed that small sites (one-third acre) can only feasibly accommodate higher density mixed-use development if the parking for retail uses is provided off-site. On-street parking spaces and public parking lots can play an important role in meeting future parking demand at activity nodes within the Corridor.

5. Limited Public Resources

Many of the challenges discussed above are intensified by limited public resources for local governments to facilitate development. The dissolution of redevelopment agencies in 2012 eliminated some of the most important tools cities had to fund streetscape improvements, assemble land, finance parking, and fund affordable housing (Figure 21). Many Corridor cities, including Daly City, Belmont, and South San Francisco, are faced with new uncertainties about how to implement revitalization plans with the demise of redevelopment. To some extent, private development can help fund some of the streetscape and other infrastructure improvements needed in the Corridor. However, there are limitations on the role that development can play in funding these types of projects. Small infill projects - particularly in weaker real estate markets and on more challenging parcels - are unlikely to generate sufficient revenues to pay for infrastructure improvements or other community benefits. Moreover, some infrastructure improvements may need to be in place before new development can occur, either to provide the increased capacity required to make new, higher intensity uses possible, or to make some segments of the El Camino Real Corridor more attractive for developers, residents, and employers.
Prior to its elimination in 2012, redevelopment played a central role in facilitating infill development and economic revitalization in many communities. Some of the key functions that redevelopment agencies performed within their designated project areas included:

- **Site assembly**: Redevelopment agencies had the authority to acquire property, prepare sites, and sell or lease land for development.

- **Funding and financing infrastructure improvements and affordable housing**: Redevelopment agencies could collect, spend, and bond against tax-increment financing (TIF). TIF is a mechanism for collecting property tax revenues that result from new investment within a designated area, and was an important source of funding local infrastructure improvements, land assembly, affordable housing, and other projects. Because redevelopment agencies could issue bonds against future TIF revenues, TIF could pay for upfront improvements in advance of new development in the project area, helping to create a more attractive environment for private investment. In addition, TIF was the primary source of local funding for affordable housing development in many communities.

- **Economic development**: Many redevelopment agencies ran economic development programs that provided assistance to business and property owners, funded with TIF and other sources.

- **Land use regulation**: Redevelopment agencies had the authority to regulate land use within their project areas.

- **Proactive approach to development**: The ability to assemble and dispose of property, combined with the funding for improvements provided by TIF and the ability to regulate land uses, allowed redevelopment agencies to take a proactive role in planning, attracting, and facilitating development in challenging locations.

A number of alternative mechanisms have been proposed as potential replacements for redevelopment. Potential replacements include infrastructure finance districts (IFDs), another, existing mechanism for collecting TIF. However, this tool is currently challenging to use in infill areas because of voter approval and other requirements. The state is considering changes to IFDs that would make them more useful in infill locations, as well as new tools such as Sustainable Communities Investment Authorities that would be authorized to collect tax increment in designated transit project priority areas and small walkable communities.
Figure 22. Mixed-use apartments at the Colma BART station.

IV. IMPLEMENTATION

The case studies included extensive technical analysis that resulted in a tailored set of strategies and findings for each case study segment. This analysis provides important lessons about successful approaches to implementation that could be employed by other cities in the El Camino Real Corridor, as well as specific strategies and tools for facilitating infill development.

Defining a Successful Approach to Implementation

The analysis performed for the case studies gave rise to three broad lessons about how cities can move effectively from vision to implementation and overcome the challenges discussed in Chapter III.

First, while the vision of the El Camino Real Corridor’s transformation into a Grand Boulevard – as articulated in GBI’s 10 Guiding Principles – provides a broad framework for change in the Corridor, implementation will require cities to adapt the vision to suit local conditions. The scale and type of development that occurs along the Corridor will not be uniform. Rather, the Grand Boulevard vision will take different forms depending on local community preferences, physical context, market conditions, and other factors. Policies and regulations must recognize and respond to these local conditions in order to enable the development that is appropriate for each place.

Second, cities must consider implementation from the beginning of the planning process. In particular, cities must understand what types of development are likely to be feasible in the short, medium, and long term, given market conditions, the size, configuration, and location of potential opportunity sites, and other factors. When short-term market conditions do not match the long-term vision, cities should consider intermediate steps that can improve the climate for development without compromising the overall vision. For example, in places where market conditions only justify lower-density retail in the near term, cities can put design guidelines in place that ensure that new buildings are consistent...
with a pedestrian-friendly public realm (for example, by requiring buildings to be located at the sidewalk with the front door opening onto the street and parking in the rear).

Finally, one of the most effective ways to create successful mixed-use, multi-modal places and efficiently target public resources is to focus efforts in activity nodes. Successful mixed-use, multi-modal places are characterized by concentrated retail, housing, and/or employment uses, complemented by a pedestrian-friendly street environment, well-managed parking, and good transit access within an easy walking radius (typically a quarter- to half-mile radius, or five to ten minutes).

In some cases, where local market conditions and development feasibility factors permit, different land uses may be combined in one building (known as vertical mixed-use). However, activity nodes can also consist of different types of single-use properties located in close proximity (horizontal mixed-use) - for example, concentrated retail surrounded by moderate- or high-intensity residential and office development. Clustering higher-intensity uses into such “activity nodes” can:

**Support successful mixed-use districts:**
Clustering development into mixed-use nodes enables synergies among different uses. For example, retailers can benefit from proximity to other shops and restaurants, creating activity centers that attract more customers. A vibrant retail scene can make a district more attractive for housing and employment uses, which in turn generate spending power to help support local retail.

**Encourage pedestrian activity and transit use:** The first step in encouraging pedestrian activity is to concentrate retail, housing, and employment uses within easy walking distance, so that residents and workers can meet their daily needs on foot, while visitors can arrive by transit, bike, or car and walk to multiple destinations. In the words of one transportation expert, “The best pedestrian plan is a good land-use plan.”

Cities can further encourage walking and transit use by targeting street, sidewalk, landscaping, transit connectivity, and other improvements within the quarter- to half-mile radius within which most people are willing to walk.

**Save the city money:** A nodal development pattern allows the city to target its investments in place-making and infrastructure improvements to smaller geographies, rather than spreading it out all along the Corridor. This is particularly important in the post-redevelopment era, when cities have fewer resources available for infrastructure, site assembly, and other investments.

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### Strategies and Tools

The case study analysis also led to a set of concrete tools and actions that cities and counties in the El Camino Real Corridor can take to facilitate infill development. The tools and actions are organized into three strategies:

**A. Plan for Vibrant Activity Nodes:** By focusing public investments and higher intensity development in concentrated activity nodes - defined as compact clusters of retail, housing, and/or employment uses concentrated within a walkable radius (a quarter- to half-mile, or five- to ten-minute walk) - cities can support successful mixed-use districts, promote pedestrian activity and transit use, and deploy public resources efficiently. This strategy provides tools that communities can use to plan for and support the development of vibrant activity nodes.
B. Align Land Use Regulations with Market and Physical Conditions: Zoning, parking, and other regulations should enable new investment to occur in the short-term, while supporting the long-term vision for transformation. This strategy presents some of the key regulatory tools that emerged from the case studies.

C. Coordinate Public and Private Investment to Create Walkable Places and Support Desired Development: Creating a high-quality environment is critical to making the El Camino Real Corridor attractive and functional for existing and new residents, encouraging developers to invest in the Corridor, and facilitating walking, bicycling, and transit ridership. This strategy presents tools for targeting public investments in street, sidewalk, landscaping and other improvements in order to create walkable places and facilitate development, and for leveraging private development to further support an appealing environment.

Each strategy is discussed in more detail below. This “toolbox” is intended to provide guidance to cities along the Corridor based on the case study analysis; most of the tools described below will require additional community participation and analysis that takes into account the unique local context in order to be successfully implemented.

Strategy A. Plan for Vibrant Activity Nodes

As discussed above, focusing public investments and higher intensity development into activity nodes - defined as compact clusters of retail, housing, and/or employment uses concentrated within a walkable district - can help encourage pedestrian activity, utilize public resources efficiently, and support successful retail. Uses within a node may be mixed vertically (in one building) or horizontally, with different uses on distinct parcels in close proximity to each other. Strategies for planning for and supporting the development of vibrant activity nodes include:

1. **Identify key activity nodes early in the planning process.** Activity nodes within the El Camino Real Corridor should be identified early in the process of drafting a land use plan and/or implementing new zoning regulations, so that the policies, regulations, and programs in the plan can be coordinated to support the transition to a nodal development pattern. Common examples of activity nodes include downtowns, major retail centers, and employment centers. In order to identify
IMPLEMENTATION

activity nodes where new development and investments should be focused, consider:

- **Walking distance.** Most people are willing to walk no more than a quarter- to half-mile (five to ten minutes) to reach shopping, a transit stop, or other destinations.

- **The location of rail and bus transit facilities (existing and planned) and existing concentrations of activity, such as existing downtowns, other retail concentrations, and employment centers.** These locations are already set to accommodate walkable development at higher intensities and will benefit both from new investment and from the increase in resident, worker, and shopping populations.

- **Local market momentum.** Recent development trends may indicate the prime locations for additional new development from a market perspective.

- **Potential for change.** Locations with potential opportunity sites of 1-2 acres or more may experience development sooner than areas with smaller, fragmented parcels.

2. **Plan for the Corridor, not just the street.** Many communities in the Corridor define their El Camino Real planning areas as the parcels that directly front on El Camino Real itself. However, by limiting the focus of planning efforts to the street, cities may miss some of the most significant opportunities for change. Moreover, by broadening their focus beyond the parcels directly on the street, cities may be able to take better advantage of potential synergies among different uses. For example, there may be opportunities to accommodate higher-intensity housing development on within walking distance of El Camino Real, residential development in the Corridor can help support local-serving retail and services located on the street – particularly if new, higher-intensity residential development is concentrated around retail nodes (Figure 23).

In other areas, cities may be able to encourage new development by allowing developers to aggregate small, shallow parcels that front on El Camino Real with those directly in the rear. The aggregation of shallow frontage parcels with those immediately to the rear creates deeper sites that allow more efficient building types, better accommodate vehicle access and parking, and create cost efficiencies for the developer (these economies of scale are discussed in greater detail in Figure 24, below). This strategy is likely to be most appropriate in parts of the Corridor where the parcels directly behind El Camino Real are occupied by multi-family or commercial development, rather than single-family homes.

3. **Support existing retail nodes.** By providing support to existing retailers and incentivizing property owners to reinvest in their buildings, cities can help create a more appealing shopping environment, attracting new customers and businesses. Moreover, supporting local businesses can create jobs and build the tax base. Strategies include providing grants or loans for tenant or façade improvements; connecting business owners with technical assistance; and targeting streetscape, other public improvements, marketing, outreach, and other economic development programs to existing commercial nodes.

4. **Focus new retail development in identified activity nodes and allow developers to build other ground floor uses outside of key nodes.** In order to succeed, new retail development typically needs to locate in concentrated nodes with high
traffic, good visibility, easy vehicle and pedestrian access, and ideally near complementary uses such as a major retailer (e.g., grocery store), a group of similar retailers (such as restaurants), or other activity centers. To the extent possible, retail nodes should be concentrated on one side of the street or corner of an intersection, rather than bisected by arterial roadways. Not all locations along the Corridor can offer these attributes - particularly because in many parts of the Corridor, overall demand for new retail may be limited. In order to contribute to successful, vibrant retail nodes and avoid an excess supply of vacant storefronts, cities should be strategic about requiring ground-floor retail uses only in places identified as activity nodes and other areas where retail is likely to succeed. Retail uses may also be allowed outside of activity nodes, but should not be required. Instead, allow developers to build housing, office, or other flexible uses on the ground floor by right outside of key nodes.

5. **Ensure that key opportunity sites are developed in a manner consistent with the vision for the Corridor.** As discussed in Chapter III, there are a limited number of potential development opportunity sites in the Corridor that are an acre or more in size and under consolidated ownership. Those larger sites that do exist, particularly those located in activity nodes, offer a rare opportunity for larger scale, higher-intensity projects. However, these sites may also be attractive for single-use retail and other auto-oriented uses in the short term. Cities should ensure that zoning regulations, design guidelines, and other policies allow flexibility for property owners and developers to respond to the market, while ensuring that new development will support the city’s long-term vision and goals.

6. **Implement a comprehensive, district-based parking management strategy.** Comprehensive parking management strategies combine multiple pricing and demand management tools in a defined geographic area in order to ensure the efficient use of existing on- and off-street parking spaces and prevent spillover parking in residential neighborhoods from visitors and workers. Parking management strategies also have the potential to enable development by allowing a city to
reduce on-site parking requirements for new development, and to generate new revenues from parking fees to pay for neighborhood improvements and transportation demand management programs. Figure 25 describes some of the tools that are commonly used in parking management districts.

Parking districts are likely to be most appropriate in and around activity nodes, because drivers need to be able to walk from their parking space to their destination in order for a parking district to work. For this reason, parking districts in the El Camino Real Corridor may best be implemented, at least in the short term, in and around downtowns. Several communities, including Redwood City, Burlingame, Menlo Park, and Mountain View already have parking management districts within the half-mile El Camino Real Corridor. Redwood City, Burlingame, and Menlo Park’s parking districts include the portion of the El Camino Real roadway located adjacent to their downtowns. These established programs can serve as models for other communities considering parking management districts, and could potentially provide the basis for gradually expanding parking districts outwards along the Corridor.

**Figure 25. Parking Management Tools**

Parking management districts typically combine multiple tools as part of a comprehensive strategy to ensure the efficient use of existing on- and off-street parking spaces, prevent spillover parking in residential neighborhoods from visitors and workers, and enable development by reducing on-site parking requirements for new development. Parking management tools can include:

- **User fees**: Charging drivers for curb parking (e.g. parking meters) and/or off-street parking (paid parking garages or parking lots). User fees may vary depending on location (e.g., higher fees in the core of downtown to ensure that spaces are always available for customers; lower prices at the periphery to encourage employees and other long-term parkers to park farther away and walk). Fees may also be adjusted so that users pay more during periods of peak demand, a practice known as variable or congestion pricing.

- **Parking credits, impact, or in-lieu fees**: Allowing developers or business owners to pay a one-time or annual fee for parking spaces in municipal garages, in lieu of providing the full number of parking spaces required by the local zoning ordinance.

- **Reduced parking ratios**: Adjusting the zoning ordinance to reduce the number of parking spaces required of new development in walkable, bikeable places with good transit access.

- **Shared parking**: Allowing different land uses (e.g. offices, retail, housing, transit stations) to share parking facilities.

- **Other parking regulations**: For example, cities may impose different time limits on parking in different zones (e.g. five-minute loading zones, 30-minute limits in front of store entrances, 1-2 hour limits on parking in residential neighborhoods). Other cities have implemented residential permit parking programs that limit long-term parking in neighborhoods to residents.

- **Signage and real-time parking information**: Signs and displays directing drivers to available parking spaces.

- **Transportation Demand Management (TDM)**: Improved transit, pedestrian and bicycle facilities, carpool incentives, or universal transit pass programs that encourage alternatives to the private automobile.

Strategy B. Align Land Use Regulations with Market and Physical Conditions

A critical component of adapting the GBI vision to local conditions is to implement zoning, parking, and other regulations that enable new investment to occur in the short-term, while supporting the long-term vision for transformation. This section discusses some of the key regulatory strategies that emerged from the case studies. While the strategies discussed below are intended to provide useful approaches and tools for common situations found within the Corridor, individual cities may need to conduct their own analysis to test the impacts on feasibility prior to implementation.

Strategies for removing regulatory barriers to infill development include:

1. **Develop geographically specific goals and policies for different nodes and other sub-districts within the Corridor.** Even within an individual city, the character of development may vary from one segment of the Corridor to the next depending on the potential for change, parcel size, existing concentration of land uses, character of adjacent neighborhoods, and other features. Based on the existing development pattern and market conditions, consider whether higher intensity development should be allowed in certain nodes (e.g., a downtown core) compared to other portions of the district; where new housing and retail of different types should be focused; which parts of the Corridor are most appropriate for parking management strategies; how streetscapes, sidewalk design, and other aspects of the public realm should differ in different places; and where new public gathering spaces should be located. **Figure 23** provides an example from the Belmont case study of how different land use policies could be applied to differentiate the sub-districts within the Corridor.

![Figure 23](image-url)

**Figure 23.** This figure shows how different land use policies could be applied to differentiate the sub-districts within the Corridor.

2. **Change height, floor area ratio (FAR), and other zoning requirements to allow financially feasible densities.** In some cases, allowing increased heights or FARs or making other zoning changes can make development more feasible by enabling developers to build more housing units or commercial square feet on a site. Higher intensity development can sometimes be more feasible because many development costs - such as costs associated with planning and design, obtaining entitlements, and grading and excavating a site - are relatively fixed, meaning that they are approximately the same no matter how many units are built. **Figure 26** shows an example of four potential development projects on the same site at different intensities, based on the feasibility analysis performed for a site in Daly City. Adding more units - through increasing

![Figure 26](image-url)

**Figure 26.** Impact of density on financial feasibility: sample results from the Daly City analysis.

The financial feasibility analysis used a pro forma model that compares the “residual land value” (the amount a developer would have leftover to pay for land, after subtracting total development costs from project revenues) with estimated land values along the Corridor (the “development feasibility threshold”). If the residual land value exceeds the feasibility threshold, the project is considered feasible. The analysis shown above compared the feasibility of different building prototypes on a 0.35 acre (15,000 sq. ft.) site. The prototypes range from a three-story, 20-unit building (lower density) to a four-story, 34-unit building (higher density), with 3,100 sq. ft. of retail in the mixed-use scenarios. As shown, the higher density prototypes are more likely to be feasible.

Sources: VMWP & Strategic Economics, 2012.
3. **Allow residential and mixed-use development by right in appropriate locations.** “By right” development refers to projects that are permitted under zoning and do not require any special use permits. Requesting zoning changes may be perceived by some developers as an additional burden or cost because of the potential for long delays.

4. **Provide flexibility on potential ground floor uses outside of activity nodes.** Requiring all new development to include ground floor retail can make development more challenging. If ground floor retail is zoned in places that do not meet retail’s locational preferences, or where there is insufficient demand, the space may sit vacant for years, detracting from the quality of the street environment and deterring development. In contrast, ground floor residential may have a higher value than retail in some cases, and help improve a project’s feasibility (see Figure 27). Other potential ground floor uses include offices or community space (e.g., bicycle rooms, gyms). For places where retail is desired in the long-term but may not be feasible in the short-term, consider requiring developers to build in features (e.g., ventilation for restaurant, appropriate ceiling heights and windows) so that ground floor space can be adapted for retail uses in the future if desired.

5. **Allow townhouse development in areas with shallow lots and a supportive street environment.** The shallowest sites in the Corridor (e.g., lots no more than 90 feet deep) are physically challenging for multi-story, residential or mixed-use development. Sites of this configuration can, however, accommodate townhouses or small-scale, low-intensity commercial development with adjacent surface parking (Figure 28). Because residential development can often generate higher revenues than retail development, new townhouses may be more likely to be built than small-scale commercial development.

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2 Note that while the development prototypes shown in Figure 25 range from two to four stories, they are all wood frame construction over a concrete podium. Buildings with more than five stories typically require a different, more expensive construction type and may not experience the same efficiencies of scale.
Moreover, new townhouses can contribute to a pleasant, walkable environment. This type of development may be most attractive for developers and potential homebuyers or renters in locations that already have some public realm improvements in place, such as wider sidewalks, landscaped buffers between sidewalks and auto lanes, street trees, and on-street parking.

6. **Enact sliding residential density scale requirements that allow developers to build at higher densities on larger lots.** Compared to smaller properties, larger properties can often accommodate higher densities at comparable building heights. For example, in the Mountain View analysis, architectural prototypes demonstrated that a 100’ by 145’ site could accommodate 20 units in four stories, while a 100’ by 300’ site could accommodate nearly 60 units in a three- and four-story building (Figure 29, next page). In other words, doubling the depth of the site almost triples the number of residential units that can be built. Including more units can make a project more feasible because the larger project benefits from efficiencies of scale, while the added units generate additional revenues. The increased site depth also provides space for the building to step down gradually in the rear to townhouses, making the project more compatible with surrounding residential neighborhoods.

A sliding residential density scale allows higher maximum densities on larger lots. For example, the City of Mountain View allows developers to build more units per acre on larger parcels in parts of the Downtown Specific Plan Area, with the allowed density increasing proportionally to the size of the lot. These policies incentivize parcel aggregation by allowing developers to take advantage of the efficiencies of scale that may be achieved on larger lots, and promote residential development that is well integrated with the surrounding neighborhood. Note that a sliding residential density scale is different than a traditional density bonus, which allows a developer to build more units in return for providing affordable housing or another community benefit. In contrast, a sliding residential density scale allows higher densities on larger parcels by right, in recognition that the higher density may be necessary for the project to be feasible.

7. **Reduce on-site parking requirements for housing, retail, and other new development in appropriate locations.** By reducing or eliminating parking minimums, cities can allow developers to provide only as much parking as the market requires, potentially reducing the cost of new development. Reducing parking minimums can be particularly important for facilitating development on small parcels, where accommodating parking requirements can be particularly challenging. Reducing parking requirements may work best in parts of the Corridor that are well served by BART, Caltrans, or frequent bus service, and/or in districts with comprehensive parking management strategies already in place. For example, as part of their comprehensive parking management policies, Redwood City, Burlingame, and Menlo Park allow for reduced amounts of parking in the portion of the El Camino Real

Figure 29. Benefits of site assembly: mixed-use development prototypes from the Mountain View case study. (Yellow represents housing units, blue represents common space, red represents retail space, and gray represents parking or vehicle access.)

Compared to smaller properties, larger properties can often accommodate higher residential densities at comparable building heights. For example, in the Mountain View analysis, architectural prototypes demonstrated that a 100’ by 145’ site could accommodate 20 units in four stories (image on left), while a 100’ by 300’ site could accommodate nearly 60 units in a three- and four-story building (right). The larger, deeper site can accommodate approximately three times as many units because required lot setbacks and daylight planes take up a smaller percentage of the property, allowing for more efficient design.

Corridor located adjacent to downtown, and allow parking spaces for some uses to be provided off-site with an in-lieu fee (discussed in Figure 25).

8. On small sites, eliminate parking requirements for ground floor uses. Figure 29 illustrates how requiring on-site parking for ground floor retail on a small (100’ by 300”, 0.7 acre) site can act as a drag on development feasibility by driving up construction costs. The Daly City and Mountain View development feasibility studies also showed that even smaller sites (e.g., 0.3 acres) may not be able to physically accommodate parking for ground floor retail because of vehicle access challenges. As an alternative to eliminating parking requirements for small amounts of ground floor retail or other ground floor uses, cities may also consider allowing parking spaces to be provided off-site with an in-lieu fee (see Figure 25).

9. Provide flexibility in community benefit requirements for small lots. Development feasibility can vary significantly along the Corridor depending on local land values, housing prices, and other factors. However, in many cases, development on small parcels (e.g., sites under an acre) may not be able to support community benefit requirements. By relaxing these requirements on small, challenging parcels, cities may be able to facilitate new development that contributes to the overall transformation of the Corridor.

![Three- and Four-Story Condos with Ground Floor Retail (100’x300’ site)](image)

Figure 30. Impact of parking requirements on financial feasibility: sample results from the Mountain View analysis.

The amount of parking included in a development project can have a significant effect on the project’s financial feasibility. The chart compares two mixed-use residential projects, both with 57 condo units and 3,600 sq. ft. of ground floor retail. Because of the costs associated with providing underground parking spaces, the project is much more feasible without on-site retail parking. (See Figure 26 for discussion of financial feasibility methodology.)

Sources: VMWP & Strategic Economics, 2013.
Strategy C. Coordinate Public and Private Investment to Create Walkable Places and Support Desired Development

Creating a high-quality environment is critical to making the El Camino Real Corridor attractive and functional for existing and new residents, encouraging developers to invest in the Corridor, and facilitating walking, bicycling, and transit ridership. In addition to planning for pedestrian-scaled activity nodes - the primary focus of Strategies A and Figure 31. A Closer Look at Complete Streets Infrastructure

GBI recently sponsored two projects, Infrastructure Needs Assessment and Financing Strategy and Designing El Camino Real as a Complete Street, which studied complete streets improvements from different perspectives. Both studies were funded by the TIGER II planning grant that also funded ECHO II. The Complete Streets project designed model segments of the Corridor in Daly City, South San Francisco, San Bruno, and San Carlos, in order to provide guidance for future El Camino Real improvements and replication across the nation (see model design, below). The Infrastructure Needs Assessment and Financing Strategy examined the major infrastructure needs in the Corridor and potential ways to pay for needed improvements, and concluded that complete streets improvements are a major cost category that is largely unfunded by existing sources. Funding these types of projects has become particularly challenging with the elimination of redevelopment. In the absence of redevelopment, cities will need to use existing resources more strategically, look for ways to leverage private development, and continue to apply for competitive federal, state, and regional grants. As discussed in the report, the state is also considering legislation that would replace some of the functions of redevelopment with new or modified tools.

Model design for green complete street improvements on El Camino Real.
B, above - cities can help shape the quality of the pedestrian experience and attractiveness for development by investing in street, sidewalk, landscaping, bicycle, and other elements of a “complete street.” Cities can also work with developers to integrate private development with the public realm in a way that contributes to an appealing neighborhood. This strategy presents tools that cities can use to coordinate private and public investment to create an attractive, cohesive pedestrian environment, facilitate development, and ensure that scarce public resources are deployed for maximum impact.

1. **Develop an area-wide plan for complete streets improvements.** Complete streets are designed to be safe and comfortable for all users, whether they are traveling by foot, bicycle, transit, or car. By creating an area-wide complete streets plan, cities can coordinate the incremental improvements made by multiple property owners and the public sector over time. Complete streets plans should establish standards and guidelines for different types of streets within the Corridor, considering not only the function of the street itself (i.e., major arterial, downtown main street, neighborhood side street) but also the envisioned character and land uses of each subarea. For example, in areas where retail is the primary ground floor use, trees, and street furnishings should enhance the pedestrian environment without obscuring signs or window displays. In contrast, residential areas benefit from denser tree foliage and closer tree space to protect residents’ privacy. Decisions about appropriate streetscape improvements should also be informed by transportation studies that assess the trade-offs between pedestrian and bicycle amenities, bus access, and vehicular traffic flow on major thoroughfares.

2. **Implement design guidelines and development standards to ensure that new development supports the envisioned character of the Corridor.** For example, cities can require buildings to be located at the sidewalk with the front door opening onto the street and parking in the rear, and set minimum standards for ground floor windows and building materials so that building façades contribute to a pleasant walking environment (Figure 33). Design guidelines and development standards can also address building scale, massing, entrance features, and other elements that affect the street environment. These types of guidelines can help ensure that all new development contributes to the desired visual character and pedestrian experience on the street - both within activity nodes and in the segments of the Corridor between nodes. Moreover, creating design guidelines can help assure developers and residents that the Corridor will develop in a consistent way over time.

![Figure 32](image-url) Cities can help ensure that single-use retail buildings do not detract from the long-term vision for the Corridor by requiring that buildings be located at the sidewalk with the front door facing the street and that parking be located in the rear, and working with developers to coordinate public and private streetscape improvements.

3. **Look for opportunities to leverage private sector investments.** Private development may be able to contribute to the public realm directly by including pedestrian amenities or landscaping in a project (for example, as part of a development agreement), or financially through impact fees or a negotiated payment. These types of contributions are most likely to be feasible in strong markets and on large parcels where the value created by new development is high enough to support community improvements. On small, challenging parcels and in weaker markets, new development may not generate sufficient revenues to pay for significant community benefits. Moreover, in some places, streetscape or other infrastructure improvements will need to be made first, in order to make the Corridor attractive for new investment.

4. **Target publicly funded improvements to activity nodes and other high-priority locations.** Given the scarce resources available in most cities for public realm improvements, cities should target funding to specific locations such as activity nodes and transit stations. In addition to making the most efficient use of public resources, concentrating improvements in specific areas - rather than spreading investments along long stretches of the Corridor - is more likely to be effective in contributing to vibrant nodes of activity and encouraging pedestrian activity and transit ridership.

Figure 33. The City of Burlingame is conducting extensive streetscape and utility improvements on Burlingame Avenue from El Camino Real to California Drive. The City worked with downtown business and property owners to establish a special assessment district that is paying for approximately one-third of the total cost of improvements.

Conclusion

Facilitating infill development in the El Camino Real Corridor is an important goal at both the regional and local levels. The Corridor represents a key component of the region’s plan to accommodate growth in sustainable infill locations, close to transit and job centers. At the local level, many communities have embraced the GBI’s vision of the El Camino Real Corridor “as a place for residents to work, live, shop and play, creating links between communities that promote walking and transit and an improved and meaningful quality of life.”

However, in order to meet the Corridor’s full potential, communities will need to address the barriers to infill development, including physical, market, and regulatory challenges. The strategies in this document, which include planning for vibrant activity nodes, aligning land use regulations with market conditions, and coordinating public and private investment, can help cities on the Corridor begin to overcome these challenges and implement local plans that will advance the Grand Boulevard vision.

Figure 34. Streetscape improvements at the Top of the Hill node in Daly City.
Grand Boulevard Initiative

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