



OFFERING  
MEMORANDUM

# Puetz Golf Property

Seattle, Washington | [PuetzGolfSeattle.com](http://PuetzGolfSeattle.com)

**km** Kidder  
Mathews

## OFFERING MEMORANDUM

# PUETZ GOLF PROPERTY

## Table of Contents

- 01 Executive Summary
- 02 Property Description
- 03 Apartment Market Overview
- 04 Puget Sound Region
- 05 Kidder Mathews Overview
- 06 Appendix



### Exclusively represented by

**Dave Speers**  
Senior Vice President, Partner  
dspeers@kiddermathews.com  
206.296.9626

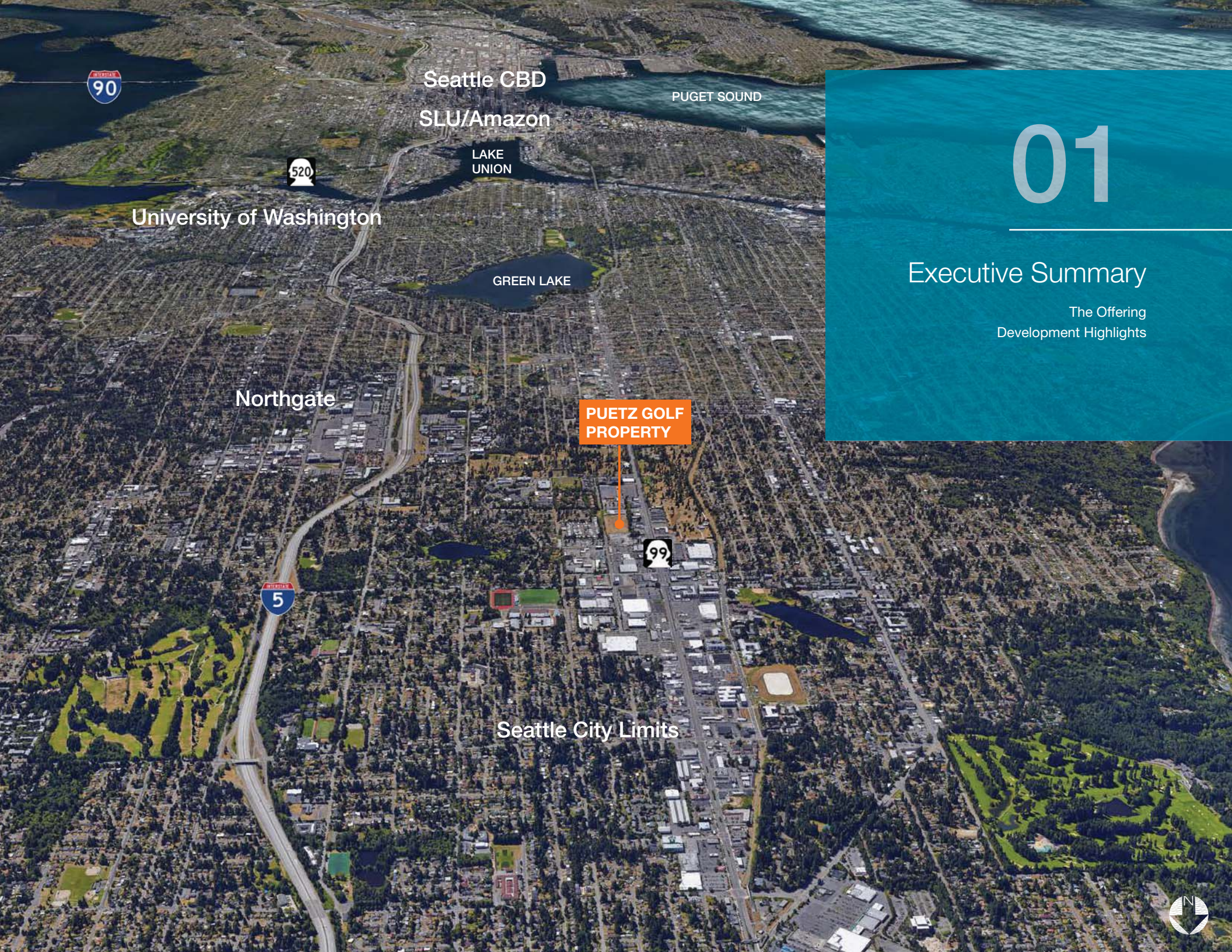
**Bob Conrad**  
Senior Vice President, Partner  
bconrad@kiddermathews.com  
425.922.2647

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Seattle CBD  
SLU/Amazon

PUGET SOUND



LAKE UNION

University of Washington

GREEN LAKE

Northgate

**PUETZ GOLF PROPERTY**



Seattle City Limits

# 01

## Executive Summary

The Offering  
Development Highlights



# Executive Summary

## The Offering

Kidder Mathews has been retained by Puetz Associates to market for sale the Puetz Golf Property in North Seattle.

This large site development opportunity is situated in the Bitter Lake submarket of North Seattle. The 7.15 acre property is primarily operated as Puetz Golf Driving Range and Pro Shop and two retail tenants on the Aurora Avenue frontage.

### PROPERTY OVERVIEW

PROPERTY	Puetz Golf Property
TYPE	Redevelopment opportunity
ADDRESS	11762 Aurora Avenue North, Seattle
LAND AREA	8.69 acres - 378,528 sq. ft.
ZONING	C1-65 - Commercial Zone 1, 65' Height Limit
SITE TOPOGRAPHY	Predominantly flat
CURRENT USE	Puetz Driving Range and Golf Pro Shop;
OFFERING PROCESS	Offers evaluated as received; ownership reserves the right to set offer date
OFFER PRICE	\$35 million

## Development Highlights

### SITE SIZE

This is one of the largest sites available for sale from Seattle's CBD northerly to Snohomish County.

The buyer of this site will control a site large enough for a master planned multifamily garden style development, townhomes, senior housing project, or a corporate campus.

### REGIONAL ACTIVITY

The extremely active central Seattle office and multifamily market has driven land and housing prices up significantly in the past two years. Therefore the close-in North, and to a less extent South-Seattle submarkets are now experiencing greatly increased development activity in such neighborhoods as the University District, Roosevelt District, Ballard, and the subject Aurora Corridor.

The Puetz Golf Property is located in the center of these submarkets, and is by far the largest site available in these markets.

### ACCESSIBILITY AND LOCAL AMENITIES

The subject property is located adjacent to Aurora Avenue North, a principal north - south arterial into Seattle's CBD, and northerly into Snohomish County. Many major bus routes, including Metro Rapid Ride, service this corridor. The site is approximately 1 mile from the Northgate Link Light Rail Station, due to open in 2021, and approximately 1/2 mile from the I-5 access at N 130th Street.

Local amenities include grocery-anchored centers, fitness centers, Home Depot, Lowe's Home Center, and a variety of other retail and service offerings. Northgate Regional Shopping Center is located 1 mile southeasterly of the subject site.

### OFFERING PROCESS

The property is being offered at \$35 million, and offers will be evaluated as received. However Ownership reserves the right to set a call for offers date at some future time.

# 02

## Property Description

- Location
- Current Usage
- Zoning Information
- Neighborhood Information



# Property Description

## Location

The sites are located on Aurora Avenue North and the main site immediately adjacent and easterly of the Aurora Avenue frontage. The site is one block east of Aurora Avenue N (State Route 99), a principal north-south arterial, whereas N 125th Street is an east-west collector. The property is located in the Haller Lake neighborhood within the larger Northgate district of North Seattle.

## CURRENT USAGE

The primary 7.15 acre site is operating as Puetz Golf Driving Range and Golf Pro Shop. The range and pro shop building improvements are 16,376 sq. ft. The two parcels fronting Aurora Avenue North are occupied respectively by a single tenant Asian restaurant and a multi-tenant retail building.

## ZONING INFORMATION

The properties are zoned C1-65 – Commercial Zone 1, City of Seattle, 65 foot height limit. The site is impacted by the Bitter Lake Village HUB Urban Village overlay district, which further delineates development standards in that district. The current uses on all three properties are conforming uses under the subject zoning.

## NEIGHBORHOOD INFORMATION

The subject is situated in North Seattle in the Haller Lake neighborhood near the city limits of Seattle at N 145th Street. The City of Shoreline extends to the north, and the two areas are connected by the Aurora Avenue corridor. The immediate neighborhood is considered to be the area around the intersection of N 130th Street and Highway 99 west of I-5. The City of Seattle has designated this area the Bitter Lake Village Hub Urban Village with specific design and development regulations aimed at higher-density development with increased public transit service. See Appendix for Bitter Lake Urban Framework.





## ACCESSIBILITY

The Bitter Lake HUB neighborhood is centered on the confluence of N 130th Street and Highway 99 west of I-5. Highway 99, also known as Aurora Avenue N in north King County, is a commercial corridor that runs from Seattle to Everett and preceded the development of Interstate 5 to the east. N 130th Street is a major arterial that runs west from I-5 near the Jackson Park Golf Course to 6th Avenue W in the neighborhood of Broadview. I-5 is the major transportation corridor for Western Washington and the entire West Coast for that matter. N 130th Street only has southbound ingress and northbound egress to I-5. Further north at N 145th Street and south at N Northgate Way are full interchanges with I-5. The site is located one block east of Highway 99 (Aurora Avenue), and south of N 125th Street, a neighborhood east-west collector.

## IMMEDIATE VICINITY

To the east of the subject is residential development, including the community of Haller Lake. Additional residential development is located to the south, including Stendall Place, a planned unit development (PUD) built in the early 1980s. Also, to the south is the Evergreen Park Cemetery. Northwest Hospital and Medical Center is approximately 700 feet to the southeast. This is a full-service, non-profit

community hospital offering comprehensive medical, surgical, and therapeutic services with 281 beds and more than 1,900 employees. To the north is a 4+ acre site currently occupied by Lincoln Towing Company. Lincoln Towing is slated for a townhome development by Quadrant Homes. Permit applications indicate preliminary plans for 125 townhomes on the Lincoln Towing site.

## PUBLIC TRANSPORTATION

Several King County Metro transit stops are located within walking distance of the subject including the RapidRide E line that offers regular service between Downtown Seattle and the Aurora Village Transit Center in Shoreline. According to walkscore.com, the subject has walk, transit, and bike scores of 71, 49, and 66, respectively.

The site is approximately 1 mile from the Northgate Link Light Rail Station, due to open in 2021, and approximately ½ mile from the I-5 access at N 130th Street.

## ADDITIONAL INFORMATION

Additional information will be made available in our secured data room for prospects that register in our offering web site: [www.PuetzSeattle.com](http://www.PuetzSeattle.com)

# 03

## Apartment Market Overview

Regional Apartment Market  
Demographics





# Apartment Market Overview

## Regional Apartment Market

The subject is located in the North Seattle apartment submarket as delineated by Dupre+Scott, the most extensive and long-lived survey of the Puget Sound apartment market, which published its final report in September 2017. In this section, information is included from the final Dupre+Scott report with supplemental information from CoStar and Yardi to illustrate the current market and trends since that report. Rental rates and vacancy rates are available from CoStar and Yardi, with minor differences in areas and inventory.

The regional apartment market remains on a plateau at the top of this cycle. The general long-term outlook for the Puget Sound region continues to be better than

most markets nationwide, but that may be challenged by the combination of slower job growth and an expanding number of planned units. Rental rates in the Dupre+Scott fall 2017 report are up 7.8% over fall 2016 (6.1% for new construction only). Concessions remain limited to less than 15% of projects surveyed but are increasing. Managers and owners anticipate a 3.1% rent increase over the next six months. Most developers expect near-term rent growth to moderate; but still anticipate average annual rent growth of 3% or so over the next 7 - 10 years.

An estimated 10,595 units were completed regionally in 2015, a 3.9% increase over 2014. 2016 saw 10,065 units, a 3.6% increase. Deliveries jumped up significantly in 2017 with 14,145 units. That number will be at least matched in 2018 with 14,918 units expected, followed by 19,988 in 2019, then slowing in 2020 to 16,462 units.

## APARTMENT MARKET OVERVIEW

Construction Activity*	Before 2004	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Tri-County	215,218	(227)	(2,626)	(4,600)	(1,083)	2,667	6,025	4,192	1,492	6,006	7,293	7,410	10,001	8,989	12,575	14,595	19,451	15,828	7,636
King County Total	138,903	86	(2,516)	(3,088)	(684)	1,694	5,458	3,973	1,119	4,005	6,054	6,709	7,992	8,035	11,092	13,283	15,502	14,494	7,456
King County-North	18,177	36	(126)	(359)	(45)	371	1,491	400	44	611	1,829	1,798	1,296	1,627	2,057	2,244	3,172	2,325	412
Ballard	996	-	-	(42)	-	64	260	268	-	25	586	616	531	175	468	383	239	-	-
Greenlake/Wallingford	2,728	-	259	(199)	8	40	351	71	23	206	262	804	382	1,293	730	669	743	716	-
North Seattle	8,061	-	(58)	(84)	(238)	142	488	109	-	132	648	266	70	-	359	496	635	393	224
Shoreline	3,105	36	(275)	(34)	124	-	259	-	21	148	-	-	129	(33)	60	293	484	320	-
University	3,285	-	(52)	-	61	125	133	(48)	-	100	333	112	184	192	440	403	1,071	896	188

\*Construction of 20-unit or larger complexes, net of conversions and demolitions.

# Apartment Market Overview

## INVENTORY/VACANCY HISTORY (NET OF CONVERSIONS)

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
King County-North	18,177 7.7%	18,213 5.7%	18,087 4.1%	17,728 2.9%	17,683 2.6%	18,054 2.9%	19,545 3.9%	19,945 3.9%	19,989 3.5%	20,600 2.7%	24,429 2.6%	24,227 2.4%	25,523 2.5%	27,150 3.7%	29,207 3.9%
Ballard	998 2.8%	998 2.3%	998 2.2%	956 0.8%	956 0.5%	1,020 1.0%	1,280 6.7%	1,548 2.0%	1,548 2.0%	1,573 3.6%	2,159 3.1%	2,775 3.6%	3,306 3.3%	3,481 3.8%	3,949 3.4%
Greeklake/Wallingford	2,728 10.3%	2,728 4.3%	2,987 4.1%	2,788 3.4%	2,796 1.6%	2,836 3.6%	3,187 5.9%	3,258 2.8%	3,281 3.9%	3,487 2.8%	3,749 1.7%	4,553 2.0	4,935 1.5%	6,228 3.9%	6,958 4.0%
North Seattle	8,061 6.9%	8,061 6.0%	8,003 3.9%	7,919 2.5%	7,681 2.6%	7,823 2.7%	8,311 6.9%	8,420 4.0%	8,420 3.6%	8,552 2.5%	9,200 2.9%	9,466 2.7%	9,536 2.6%	9,536 3.4%	9,895 3.7%
Shoreline	3,105 7.1%	3,141 8.1%	2,866 4.9%	2,832 3.3%	2,956 4.3%	2,956 3.6%	3,215 7.8%	3,236 4.0%	3,236 4.0%	3,384 3.2%	3,384 2.1%	3,384 1.3%	3,513 1.7%	3,480 2.5%	3,540 3.2%
University	3,285 11.4%	3,285 4.3%	3,233 4.2%	3,233 4.2%	3,294 2.8%	3,419 2.3%	3,552 7.2%	3,504 5.3%	3,504 3.1%	3,604 2.2%	3,937 2.9%	4,049 2.6%	4,233 3.2%	4,425 4.8%	4,865 5.3%

## ABSORPTION HISTORY

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
King County-North	397	171	(132)	9	307	666	971	122	754	1,802	1,800	1,239	1,261	1,922
Ballard	5	1	(28)	3	59	184	312	11	(1)	576	583	522	152	466
Greeklake/Wallingford	164	254	(171)	58	(17)	265	168	(14)	236	296	777	399	1,124	695
North Seattle	73	114	30	(240)	130	126	346	34	221	595	277	78	(76)	317
Shoreline	2	(161)	13	90	21	115	125	17	169	37	27	113	(60)	34
University	233	(66)	19	105	139	(44)	22	77	129	298	121	154	115	395

Source: Dupre + Scott, County records, adjusted by known projects not included in Dupre + Scott

# Apartment Market Overview

## Regional Apartment Market Cont'd

The subject is in the North Seattle apartment submarket as mapped by Dupre+Scott. The submarket spans from Lake Washington to Puget Sound between NE 85th and NE 145th Streets. This segment contains the highest concentration of apartment development in the corridor due to strong demand created by a variety of employment centers; Lynnwood to the northwest, Northgate to the west, the Seattle CBD to the south, Bothell, and other eastside cities to the east.

Apartments in North Seattle have seen increased interest from residents priced out of the neighborhoods immediately surrounding the Seattle CBD by rapidly increasing rent in the University and Green Lake submarkets to the south. Rental rates have historically increased north to south for similar product, and the southward migration during the recession has now reversed for affordability reasons.

North Seattle and the adjacent submarkets offer a more traditional residential community feel than the more urban submarkets to the south around the Seattle CBD. There are a number of new properties in all of these neighborhoods as rental rates have been at cost-feasible levels for several years at this point. Demand remains strong for these new, better quality apartments.

It is estimated that at the end of 2017 there were about 9,895 apartment units in the North Seattle submarket, counting only projects over 20 units. Yardi, which surveys properties with more than 50 units, reports a similar submarket inventory of 9,719 units in 75 properties as of April 2018. Smaller properties are estimated to add another 1,000 to 1,200 units. Over the past five years, 1,343 units were added to the North Seattle submarket. The pace continues with several large projects proposed. A list of recently delivered, under construction, and proposed multifamily projects is presented in the Development section.

## SUBMARKET VACANCY

As reported by Dupre+Scott, the North Seattle vacancy was at 3.7% in fall 2017, slowly rising from a low of 1.8% in Spring 2013. This reflects new construction in the submarket and surrounding submarkets. The five year averages for King-North and the competing submarkets range between 2.1% and 3.5% with Shoreline at the low end of the range (with little new inventory), North Seattle at 2.9%, and Ballard at the upper end.

SUBMARKET VACANCY (FALL 2017)						
	King-North	Ballard	Greenlake / Wallingford	North Seattle	Shoreline	University
1974 and older	3.7%	3.8%	2.7%	3.6%	2.9%	5.1%
1975 - 1984	2.5%	N / A	4.2%	1.1%	2.6%	6.2%
1985 - 1989	3.2%	2.6%	2.5%	3.1%	3.7%	3.0%
1990 - 1999	4.3%	0.0%	2.8%	5.4%	0.0%	3.9%
2000 - 2009	3.8%	2.8%	3.4%	3.6%	4.4%	4.6%
2010 and newer	3.9%	3.4%	4.0%	3.7%	3.1%	5.3%
Total	3.9%	3.4%	4.0%	3.7%	3.1%	5.3%
5-Year Average	2.8%	3.5%	2.6%	3.7%	2.1%	3.1%

# Apartment Market Overview

## RENTAL RATES

The increased vacancy and slower traffic in 2009 led to rent reductions or concessions, and both in some markets. Regionally, these adjustments erased much of the 20% to 35% rent increases achieved between 2005 and 2007. By late 2009, rents had dropped back to levels of spring 2008. The trend reversed in 2010, primarily through the weaning of the market from rent specials. That trend has now ended specials in most of the close-in markets and face rates have continued to increase, a trend that is expected to continue. The rate of growth may moderate as new unit delivery in the Seattle core and the real potential of short-term oversupply will have a ripple effect throughout the Seattle markets through 2019.

Rent growth has moderated over the past nine months as new inventory has finally started to balance the supply-demand relationship. Property managers are still anticipating an increase in rent over the coming six months (as of September 2017) of 3.0% for King-North and from 1.4% (University) to 3.5% (Green Lake) in the submarkets. These forecasts are all lower than in the previous survey.

The table below tracks the overall average face rent for all units in the King-North submarkets.

MARKET AVERAGE RENTAL TRENDS (FALL 2017 SURVEY)								
	2012	2013	2014	2015	2016	2017	Change 2012-17	Average 2012-17
<b>King-North</b>	\$1,098	\$1,174	\$1,284	\$1,402	\$1,502	\$1,593	<b>45.1%</b>	<b>7.7%</b>
<i>% Change</i>	6.60%	6.92%	9.37%	9.19%	7.13%	6.06%		
<b>Ballard</b>	\$1,264	\$1,452	\$1,563	\$1,731	\$1,784	\$1,820	<b>44.0%</b>	<b>7.6%</b>
<i>% Change</i>	8.03%	14.87%	7.64%	10.75%	3.06%	2.02%		
<b>Greenlake/Wallingford</b>	\$1,338	\$1,381	\$1,557	\$1,642	\$1,767	\$1,853	<b>38.5%</b>	<b>6.7%</b>
<i>% Change</i>	7.13%	3.21%	12.74%	5.46%	7.61%	4.87%		
<b>North Seattle</b>	\$997	\$1,063	\$1,130	\$1,240	\$1,324	\$1,419	<b>42.3%</b>	<b>7.3%</b>
<i>% Change</i>	5.73%	6.62%	6.30%	9.73%	6.77%	7.18%		
<b>Shoreline</b>	\$1,012	\$1,047	\$1,101	\$1,199	\$1,302	\$1,388	<b>37.2%</b>	<b>6.5%</b>
<i>% Change</i>	6.41%	3.46%	5.16%	8.90%	8.59%	6.61%		
<b>University</b>	\$1,117	\$1,211	\$1,361	\$1,499	\$1,520	\$1,637	<b>46.6%</b>	<b>7.9%</b>
<i>% Change</i>	8.03%	8.42%	12.39%	6.47%	4.90%	7.70%		

Overall, it shows that rental rates were above their previous high points as of fall 2017. It is noted that a significant portion of the increase in all of these submarkets was due to the high quality of the new units added to the relatively small base inventories starting in 2009. In Ballard, for example, inventory has increased over 240% since 2008 and the Green Lake inventory grew by 120%. The North Seattle increase was 22% during this time period.

The following tables outline the Dupre+Scott fall 2017 rental rates in the subject's competitive submarkets by property age. The face rates for most unit types are up from the fall 2016 survey, but only by minor amounts on the order of \$0.01 - \$0.02/sq. ft. The rates for two-bedroom units have fared better than have studio units. This is a regional effect as interest in two-bedroom units by both roommates and couples who are looking at longer-term residence with an office or extra space has increased.

It is important to note that newer properties pass through utilities to the tenant through utility surcharge or sub-metering systems. The properties also charge extra for parking, although the ratio of cars per resident continues to decline in the close-in markets.

Per-square-foot figures have also been influenced upward by a trend toward smaller units. In addition to the base affordability issue, younger residents have fewer belongings and are more likely to look outside their residential unit for entertainment and dining.

# Apartment Market Overview

## DEVELOPMENT

Apartment development is currently feasible in the North Seattle submarket. CoStar reports ten properties set for delivery in the submarket in 2018 with a total of 1,003 units. The following table depicts recently delivered, under construction, and proposed multifamily projects in the North Seattle submarket. This development has been good for seasoned projects as the price gap between new construction and older product is wide and has allowed for significant rent increases in older projects.

A large proportion of new construction is located in Northgate in anticipation of the new Link light rail station. The largest project under construction is the Lane Apartments which is expected to deliver 217 apartments in Q4 2018 in the Northgate neighborhood.

STATUS	DELIVERY	UNITS	BUILDING ADDRESS	BUILDING NAME	DEVELOPER NAME
X	2015	24	12350 33rd NE, Seattle		
X	2015	80	8727 Phinney Ave N, Seattle	Footprint Phinney	Johnshon & Carr
X	2015	80	8520 20th Ave NE, Seattle	Sedona Apartments	Footprint Investments LLC
X	2015	45	14307 Greenwood Ave N, Seattle	Greenwood Place	
X	2015	8	1126 N 90th St, Seattle	Galloway Apartments	
X	2017	80	13730 Lake City Way NE, Seattle	The Savoy at Lake City	Steve Smith Dev., LLC
X	2017	131	9176 Holman Rd NW, Seattle	Parla	
X	2017	150	12311 32nd Ave NE, Seattle	Origin Apartments	Summer Hill Apartment Complex
U	2019	59	147 N 132nd St, Seattle	Compass Broadview	Compass Housing Alliance
U	2019	99	937 N 96th St, Seattle	DESC N 96 Apartments	DESC
U	2018	138	10711 8th Ave NE, Seattle	Northgate	Wallace Properties, Inc.
U	2018	217	10702 5th Ave NE, Seattle	Lane Apartments	Goodman Real Estate, Inc.
U	2018	84	9039 Greenwood Ave N, Seattle	Greenwood Apartments	The Rush Companies
U	2018	21	8559 Mary Ave NW, Seattle		
U	2018	123	3025 NE 130th St, Seattle		Gaofeng Duan
U	2018	82	8511 15th Ave NE, Seattle	Aegis at Ravenna	Aegis Living
U	2018	37	12544 15th Ave NE, Seattle	Athlon	Athlon LLC
U	2018	23	1141 N 91st St, Seattle	Cascadia Flats	Wilson Realty Exchange, Inc.
U	2018	170	907 N 135th St, Seattle	Linden Flats Apartments	GMD Development
U	2018	108	1008 N 109th St, Seattle	Cubix North Park	Parkstone Investments
P	2020	235	10700 5th Ave, Seattle		Einar K. Pedersen
P	2019	31	12303 15th Ave NE, Seattle	Pinehurst Apartments	Yu Xiahou
P	2019	40	8541 15th Ave NW, Seattle		Paar Development

X: Existing, U: Under construction, P: Proposed

# Apartment Market Overview

STATUS	DELIVERY	UNITS	BUILDING ADDRESS	BUILDING NAME	DEVELOPER NAME
P	2020	252	12729 30th Ave NE, Seattle		Herman & Samia Mohazz Abfar
P	2019	104	12320 32n Ave NE, Seattle	NaturalLofts - Lake City	Sean Buyrne
P	2019	73	14337 32nd Ave NE, Seattle		The Stratford Company
P	2019	159	12706 NE 33rd Ave, Seattle	Artisan	Paul Lin
P	2020	220	320 N 85th St, Seattle		Shea Property Management Company, Inc.
P	2019	48	209 N 87th St, Seattle	Greenwood Apartments	Ashworth Homes
P	2019	23	1109 N 92nd St, Seattle	Z Apartments	Attollo Development
P	2019	23	1724 N 107th St, Seattle		Johnathan Kurth
P	2019	150	3310 NE 125th St, Seattle	Lake City Apartments	The Stratford Company
P	2019	20	9221 Ashworth Ave N, Seattle		Vince Donovan
P	2019	16	9545 Ashworth Ave N, Seattle	Parkside Apartments	Pasha Afichuk
P	2019	24	8820 Aurora Ave N, Seattle		
P	2019	54	9731 Greenwood Ave N, Seattle		
P	2019	54	10540 Greenwood Ave N, Seattle		Pie-Ruth Lu
P	2019	110	13524 Linden Ave N, Seattle	Linden Ave Assisted Living	Zenith Assets
P	2019	20	14002 Midvale Ave N, Seattle		Martin J Lunde
P	2019	16	1307 N Northgate Way, Seattle		Liat & Guy Arama
P	2019	151	8612 Palatine Ave N, Seattle		Gary Brunt
P	2018	16	11202 Roosevelt Way NE, Seattle		Noren Development
P	2020	255	12301 Stone Ave N, Seattle		Quadrant Homes

X: Existing, U: Under construction, P: Proposed

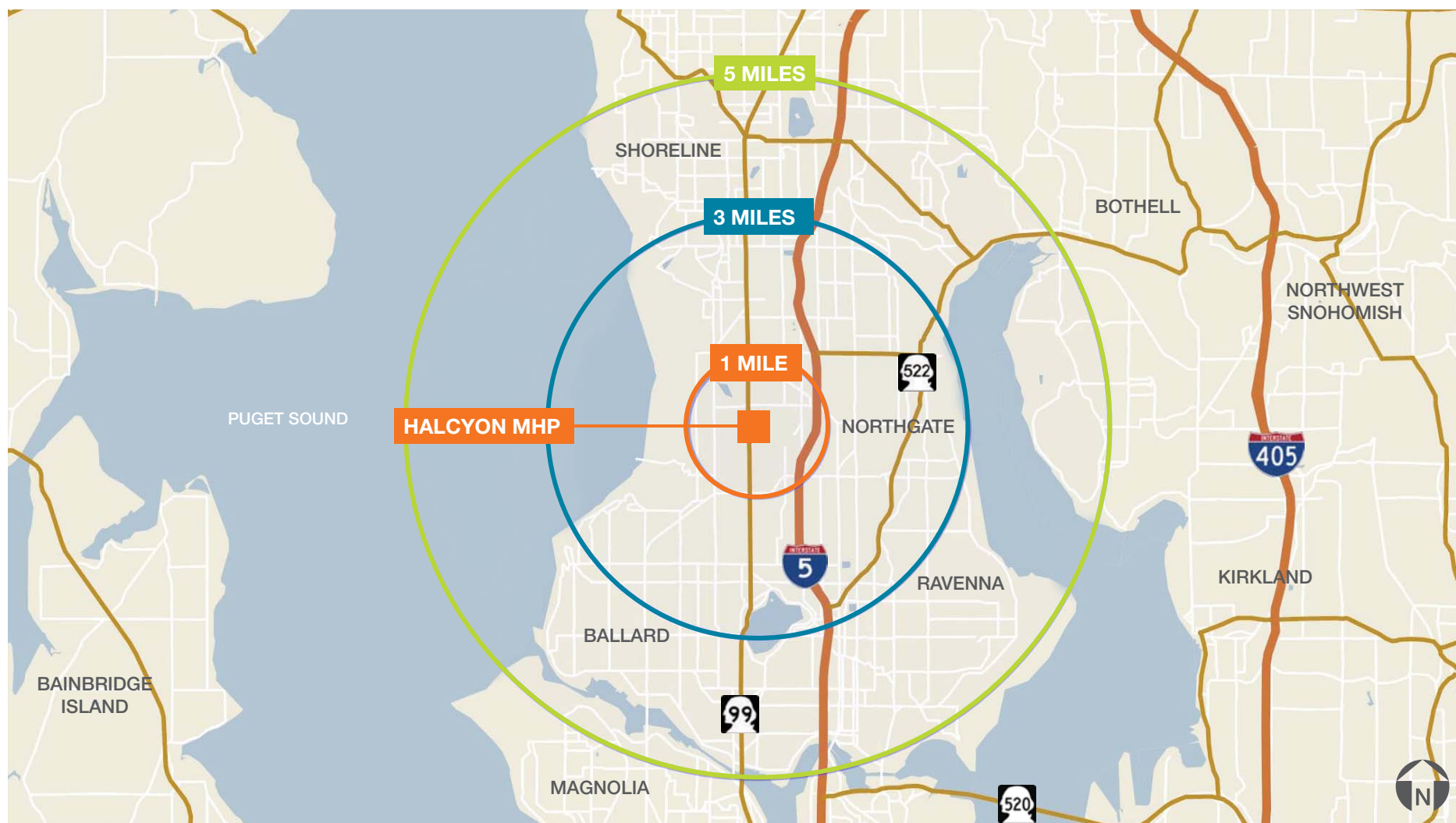
## SUMMARY

There was a rise in apartment development in the region in 2009-2010. Much of this was in response to falling vacancy rates in 2007. The markets did see vacancy rates rise and rents decline as the full effect of the recession and job losses was felt just as these new units were delivered. This peaked in spring of 2009 and vacancy rates have moved sharply downward across the region. The vacancy stayed low in all of the submarkets even through the past three years of inventory ramp-up. This will be tested in the coming 24-30 months and it is fully expected that the vacancy rate will temporarily increase in 2018-2019. In the close-in markets, rental rates are at all-time highs and are poised to continue upward, if at a more moderate rate.

The entire King-North market and its individual submarkets represent very popular residential locations that provide a range of apartment options for a variety of households. The submarkets are stable with good access and retail support. Delivery of new inventory has accelerated recently and has been well received and absorbed. The new product price point is so much higher than the seasoned inventory that its introduction has actually helped the older properties increase rents without increasing vacancy. The North Seattle apartment market is expected to remain stable for the foreseeable future.

## Demographics

	1 Mile	3 Miles	5 Miles
Population	24,228	170,981	393,669
Average Household Income	\$68,803	\$92,736	\$97,506
Median Home Value	\$338,803	\$382,007	\$403,566
Renter-Occupied Median Rent	\$847	\$921	\$934





# 04

## Puget Sound Region

Puget Sound Overview



# Puget Sound Region

## Puget Sound Overview

The Seattle Area was again the nation's top commercial real estate performer in 2017, according to the one of the industry's leading associations – the Urban Land Institute. This ranking is largely due to the region's booming local economy. A steady stream of professionals pour into the area daily as more and more tech giants from around the globe establish large office bases in the area. With an unemployment rate below 4% and thousands of high paying jobs that need employees, Seattle remains a target for young professionals all over the world.

The strong local economy coincides a vibrant educational environment; in fact, 59% of Seattle residents have earned a college degree, compared to 30% nationally. Seattle is often ranked as one of the most educated and most literate cities in the US. The area boasts one of the perennial top universities nationally in the University of Washington, and two large, highly reputable private universities in Seattle University and Seattle Pacific University. Also coming to the area is one of the region's first multinational universities, the Global Innovation Exchange, which is a partnership of the University of Washington, Microsoft, and China's Tsinghua University.

The level of higher education throughout the region has led to a highly talented workforce in numerous sectors. Seattle is an established leader in immunotherapy,

with anchors that include Juno Therapeutics, Fred Hutchinson Cancer Research Center, and the globally ranked University of Washington. The Gates Foundation and PATH have led the charge on global health, making it one of our region's key intellectual global exports.

The technology sector in Seattle is also one of the strongest and fastest growing in the world. Industry leaders, Amazon, Expedia and Microsoft have long called the Seattle area home, which has attracted numerous additional tech companies drafting off of the wealth of talented employees throughout the area. According to Glassdoor, Seattle is now the No. 1 best paying city for software engineers based on a “real adjusted salary”. With over 4,200 current job openings for software engineers, twice

Projected Job Growth		Puget Sound Population	
Puget Sound	1.89%	Current	4,067,000
United States	0.65%	Change	2.1% (2016 - 2017)

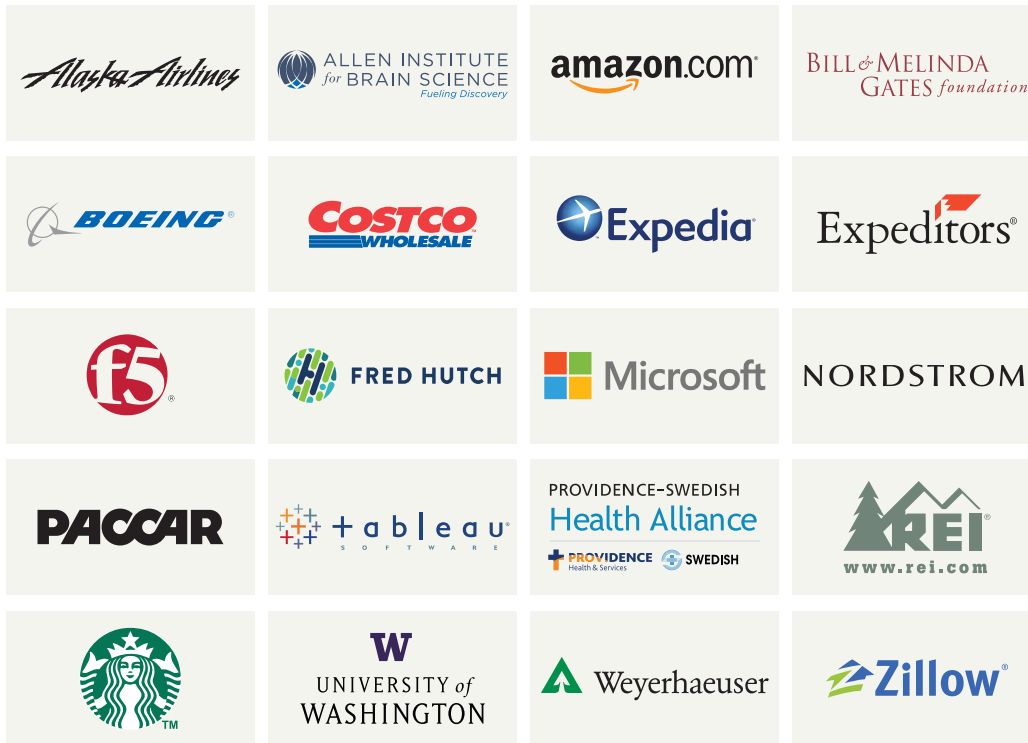


that of San Jose and almost as much as San Jose and San Francisco combined, the influx of tech employees shows no sign of slowing, especially considering Amazon's larger growth and the anticipation of up to 70,000 Amazon employees (or more) in the Seattle core by 2022.

With the number of large scale employers and economic growth coming to the area, the local office development market has also shown a significant surge. The Seattle-Bellevue office market is expected to deliver 6.5 million square feet of office space in the next 18 months. Major absorption of deliveries and a tightening amount of availability speaks to the economic growth of the area as more large employers expand their presence in this market.

The cranes on Seattle's skyline show a booming development market. Seattle's crane count has remained number one in the country for the last two years by a large margin. There is currently over \$5 billion in construction activity, a 40 percent increase over last year and more than triple its lowest point in 2011.

## Top Puget Sound Area Companies



## Seattle Rankings

- #1 Most software job openings (U.S.)  
Glassdoor, 2017

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- #1 City in US to find a job  
Wallet Hub, 2015

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- #1 Fastest-growing big city  
US Census Bureau

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- #1 Highest job growth for small businesses in the US  
Paychex/IHS Small Business Jobs Index

---

- #1 City for jobs  
Insignia

---

- #1 Most construction cranes  
Rider Levett Bucknail Ltd

---

- #2 Tech market in the U.S.  
CBRE

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- #2 Top city for tech jobs  
Geekwire

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- #5 Fastest growing city  
Insignia

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- #5 Best city to live in  
Insignia

# 05

## Kidder Mathews Overview



# Kidder Mathews Overview

## COMMERCIAL BROKERAGE

Overall annual transaction volume **\$5.6B**

Annual leases **30.9M sf**

Annual sales **18.6M sf**

## PROPERTY MANAGEMENT

Portfolio **46M+ sf**

## VALUATION ADVISORY

Appraisals annually **1,300+**

Since 1969, Kidder Mathews has been delivering results that meet, and often exceed, client expectations. Today, Kidder Mathews is the largest independent full service commercial real estate firm on the West Coast, with nearly 800 real estate professionals and employees in 20 offices in Washington, Oregon, California, Nevada, and Arizona, and continues to be known for professionalism, integrity, and client-centered responsiveness. The firm's unmatched combination of regional expertise, full range of services, and international reach gives the company the ability to respond to virtually any commercial real estate challenge anywhere.

### WASHINGTON

# Brokers ..... 119  
# Property Managers ..... 22  
# Appraisers ..... 24

### OREGON

# Brokers ..... 34  
# Property Managers ..... 6  
# Appraisers ..... 2

### NEVADA

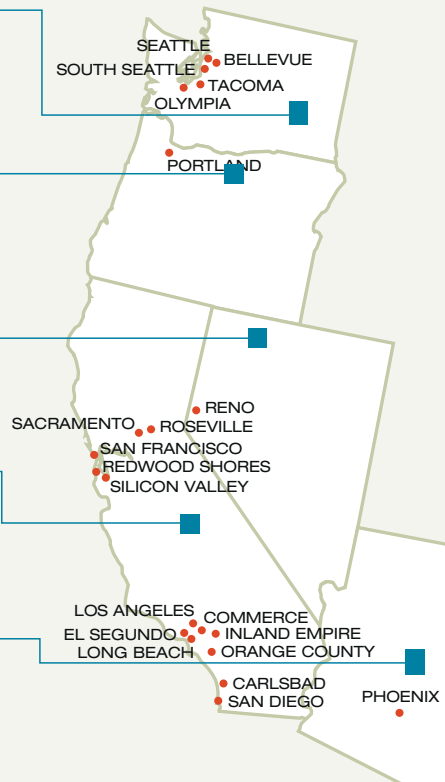
# Brokers ..... 10  
# Property Managers ..... 1

### CALIFORNIA

# Brokers ..... 158  
# Property Managers ..... 19  
# Appraisers ..... 11

### ARIZONA

# Brokers ..... 15  
# Property Managers ..... 1  
# Appraisers ..... 1



## KIDDER MATHEWS SERVICES

- |                      |                                   |
|----------------------|-----------------------------------|
| Commercial Brokerage | Project & Construction Management |
| Property Management  | Development Management            |
| Valuation Advisory   | Sustainability Practices          |
| Consulting           |                                   |

## AWARD WINNING SERVICES 2001 - 2017

- |   |   |
|---|---|
| PSBJ Largest Commercial Real Estate Firm    | PSBJ 100 Largest Private Firms                    |
| <b>15 times</b>                             | <b>9 times</b>                                    |
| PSBJ Best Places to Work                    | Business Examiner Top Commercial Real Estate Firm |
| <b>9 times</b>                              | <b>11 times</b>                                   |
| Oregon Business Magazine 100 Best Companies | Bay Area News Group Top Workplaces                |
| <b>8 times</b>                              | <b>4 times</b>                                    |



# 06

## Appendix

Commercial 1 Zone Allowable Use Chart  
Bitter Lake Urban Framework

# Appendix

## Commercial 1 Zone Allowable Use Chart

USES IN COMMERCIAL ZONES					
Uses	Permitted and prohibited uses by zone <sup>1</sup>				
	NC1	NC2	NC3	C1	C2
<b>A. AGRICULTURAL USES</b>					
A.1. Animal husbandry	A	A	A	A	P
A.2. Aquaculture	10	25	P	P	P
A.3. Community garden	P	P	P	P	P
A.4. Horticulture	10	25	P	P	P
A.5. Urban farm <sup>2</sup>	P	P	P	P	P
<b>B. CEMETERIES</b>					
	X	X	X	X	X
<b>C. COMMERCIAL USES<sup>3</sup></b>					
C.1. Animal shelters and kennels	X	X	X	X	X
<b>C.2. Eating and drinking establishments</b>					
C.2.a. Drinking establishments	CU-10	CU-25	P	P	P
C.2.b.	10	25	P	P	P
<b>C.3. Entertainment uses</b>					
C.3.a. Cabarets, adult <sup>4</sup>	X	P	P	P	P
C.3.b. Motion picture theatres, adult	X	X	X	X	X
C.3.c. Panorams, adult	X	X	X	X	X
C.3.d. Sports and recreation, indoor	10	25	P	P	P
C.3.e. Sports and recreation, outdoor	X	X	X <sup>5</sup>	P	P
C.3.f. Theaters and spectator sports facilities	X	25	P	P	P
C.4. Food processing and craft work <sup>2</sup>	10	10	25	P	P
C.5. Laboratories, research and development	10	25	P	P	P
C.6. Lodging uses	X <sup>6</sup>	CU-25 <sup>6</sup>	P	P	P
C.7. Medical services <sup>7</sup>	10 <sup>8</sup>	25	P	P	P
C.8. Offices	10	25	P	35 <sup>9</sup>	35 <sup>9</sup>

# Appendix

USES IN COMMERCIAL ZONES					
Uses	Permitted and prohibited uses by zone <sup>1</sup>				
	NC1	NC2	NC3	C1	C2
<b>C.9. Sales and services, automotive</b>					
C.9.a. Retail sales and services, automotive	10 <sup>10</sup>	25 <sup>10</sup>	P <sup>10</sup>	P	P
C.9.B. Sales and rental of motorized vehicles	X	25	P	P	P
C.9.c. Vehicle repair, major automotive	X	25	P	P	P
<b>C.10 Sales and services, general<sup>2</sup></b>					
C.10.a. Retail sales and services, general <sup>2</sup>	10	25	P	P	P
C.10.b. Retail sales, multipurpose	10 <sup>11</sup>	50	P	P	P
<b>C.11. Sales and services, heavy</b>					
C.11.a. Commercial sales, heavy	X	X	25	P	P
C.11.b. Commercial services, heavy	X	X	X	P	P
C.11.c. Retail sales, major durables	10	25	P	P	P
C.11.d. Retail sales and services, non-household	10	25	P	P	P
C.11.e. Wholesale showrooms	X	X	25	25	P
<b>C.12. Sales and services, marine</b>					
C.12.a. Marine service stations	10	25	P	P	P
C.12.b. Sales and rental of large boats	X	25	P	P	P
C.12.c. Sales and rental of small boat, boat parts and accessories	10	25	P	P	P
C.12.d. Vessel repair, major	X	X	X	S	S
C.12.e. Vessel repair, minor	10	25	P	P	P
<b>D. HIGH-IMPACT USES</b>	X	X	X	X	X
<b>E. INSTITUTIONS</b>					
E.1. Institutions no listed below	10	25	P	P	P
E.2. Major institutions subject to the provisions of Chapter 23.69	P	P	P	P	P
E.3 Religious facilities	P	P	P	P	P
E.4. Schools, elementary or secondary	P	P	P	P	P
<b>F. LIVE-WORK UNITS<sup>12</sup></b>	P	P	P	P	P

# Appendix

USES IN COMMERCIAL ZONES					
Uses	Permitted and prohibited uses by zone <sup>1</sup>				
	NC1	NC2	NC3	C1	C2
<b>G. MANUFACTURING USES</b>					
G.1. Manufacturing, light <sup>2</sup>	X	10	25	P	P
G.2. Manufacturing, general	X	X	X	P	P
G.3. Manufacturing, heavy	X	X	X	X	X
<b>H. PARKS AND OPEN SPACE</b>					
H. PARKS AND OPEN SPACE	P	P	P	P	P
<b>I. PUBLIC FACILITIES</b>					
<b>I.1. Jails</b>					
I.1.a. Youth Service Centers	X	X	P13	X	X
I.1.b. All other jails	X	X	X	X	X
I.2. Work-release centers	CCU-10	CCU-25	CCU	CCU	CCU
<b>J. RESIDENTIAL USES<sup>14</sup></b>					
J.1. Residential uses not listed below	P	P	P	P	CU15
J.2. Caretaker's quarters	P	P	P	P	P
J.3. Congregate residence	X/P <sup>16</sup>	X/P <sup>16</sup>	P/X <sup>17</sup>	P/X <sup>17</sup>	P/X <sup>17</sup>
<b>K. STORAGE USES</b>					
K.1. Mini-warehouses	X	X	25	40	P
K.2. Storage, outdoor	X	X	X <sup>18</sup>	P	P
K.3. Warehouses	X	X	25	25	P
<b>L. TRANSPORTATION FACILITIES</b>					
<b>L.1. Cargo terminals</b>					
L.1. Cargo terminals	X	X	X	S	P
<b>L.2. Parking and moorage</b>					
<b>L.2.a. Boat moorage</b>					
L.2.a. Boat moorage	S	S	S	S	S
<b>L.2.b. Dry boat storage</b>					
L.2.b. Dry boat storage	X	25	P	P	P
<b>L.2.c. Parking, principal use, except as listed below</b>					
L.2.c. Parking, principal use, except as listed below	X	25	P	P	P
<b>L.2.c.i. Park and pool lots<sup>19</sup></b>					
L.2.c.i. Park and pool lots <sup>19</sup>	P <sup>20</sup>	P	P	P	P
<b>L.2.c.ii. Park and ride lots<sup>19</sup></b>					
L.2.c.ii. Park and ride lots <sup>19</sup>	X	X	CU	CU	CU

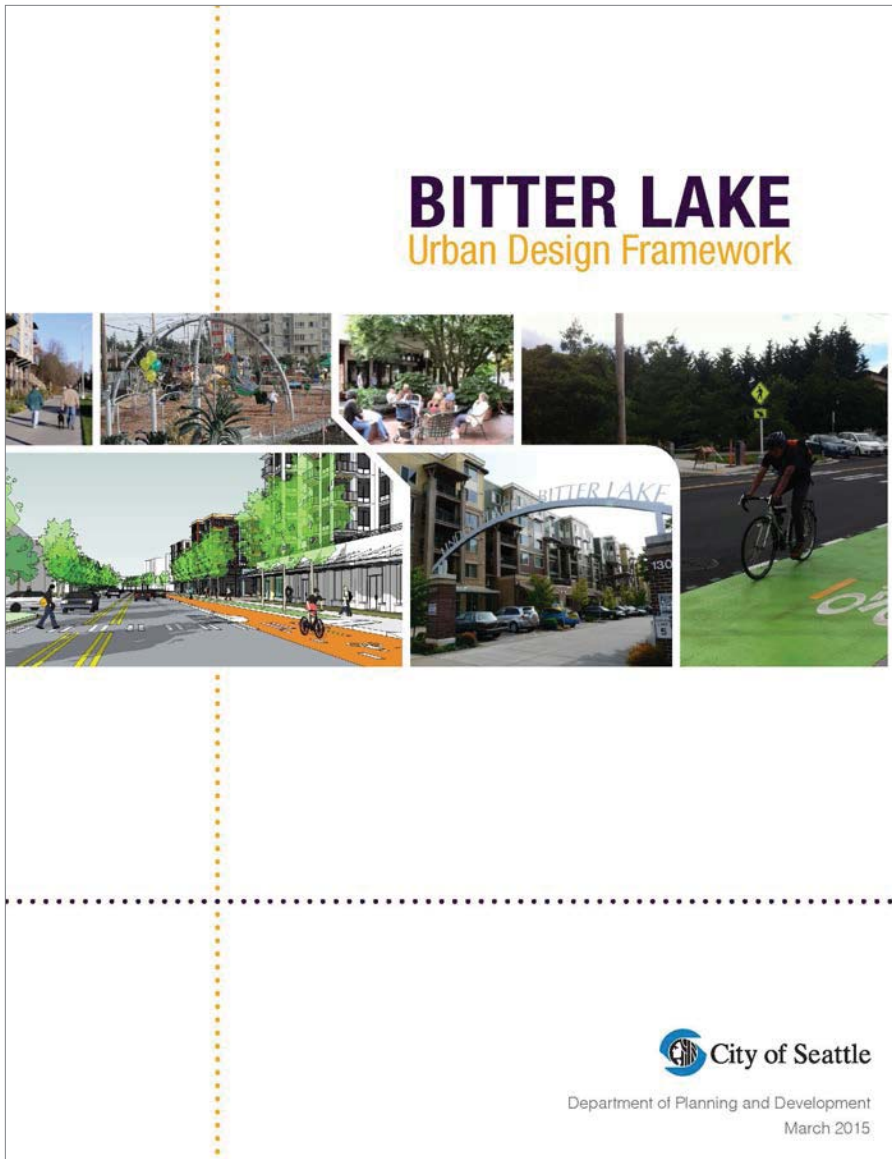


# Appendix

USES IN COMMERCIAL ZONES					
Uses	Permitted and prohibited uses by zone <sup>1</sup>				
	NC1	NC2	NC3	C1	C2
L.2.d. Towing services	X	X	X	P	P
L.3. Passenger terminals	X	X	25	P	P
L.4. Rail transit facilities	P	P	P	P	P
L.5. Transportation facilities, air					
L.5.a. Airports (land-based)	X	X	X	X	X
L.5.b. Airports (water-based)	X	X	X	X	S
L.5.c. Heliports	X	X	X	X	X
L.5.d. Helistops	X	X	CCU	CCU	CCU
L.6. Vehicle storage and maintenance					
L.6.a. Bus bases	X	X	X	CCU	CCU
L.6.b. Railroad switchyards	X	X	X	X	X
L.6.c. Railroad switchyards with a mechanized hump	X	X	X	X	X
L.6.d. Transportation services, personal	X	X	P	P	P
M. UTILITY USES					
M.1. Communication utilities, major <sup>21</sup>	X	X	X	CCU	CCU
M.2. Communication utilities, minor <sup>21</sup>	P	P	P	P	P
M.3. Power plants	X	X	X	X	X
M.4. Recycling	X	X	X	P	P/CU <sup>22</sup>
M.5. Sewage treatment plants	X	X	X	X	X
M.6. Solid waste management	X	X	X	X	X
M.7. Utility services uses	10	25	P	P	P

# Appendix

## Bitter Lake Urban Framework



### TABLE OF CONTENTS

CONTRIBUTORS.....	1
EXECUTIVE SUMMARY.....	2
GUIDING PRINCIPLES.....	2
1. INTRODUCTION.....	3
1.1 Purpose of an Urban Design Framework.....	3
1.2 Background.....	4
1.999 Broadview - Bitter Lake - Haller Lake Neighborhood Plan.....	4
1.3 BBH Neighborhood Plan Update.....	5
Community Engagement.....	5
Update Vision for a Village Center.....	5
2. CONTEXT.....	6
2.1 Physical Setting.....	6
2.2 Recent Development.....	7
2.3 Redevelopment Potential.....	8
3. RECOMMENDATIONS.....	9
3.1 Guiding Principles.....	9
3.2 Land Use.....	10
3.3 Bitter Lake Village Center.....	11
3.4 Walkable Residential District.....	13
3.5 East/West Connections Between Linden and Aurora.....	14
3.6 Circulation.....	15
Streetscape Character.....	15
Pedestrian Circulation.....	16
Linden Ave N Streetscape Concept Plan.....	19
3.7 Public and Private Open Space.....	21
3.8 Implementation.....	23

*Images by Seattle DPD or produced by consultants under contract to DPD unless otherwise noted.*

# Appendix

## CONTRIBUTORS

DPD staff managed the project process and structure. MAKERS architecture and urban design provided the lead for urban design services, while supporting the City's committee and workshop meetings. During the spring and summer of 2012, the Bitter Lake Neighborhood Advisory Committee continued to provide input and feedback on the development of the concepts developed after completing the Neighborhood Plan Update.

### Project Team

- Nathan Torgelson, DPD Planning Director
- Nora Liu, DPD Community Development Manager
- David Goldberg, DPD Project Manager

### Consulting Support

MAKERS architecture and urban design

- John Owen, Principal
- Rachel Smith
- Betsy Jacobsen

### Broadview - Bitter Lake - Haller Lake Neighborhood Advisory Committee

- Dan Stern
- Darryl Bennett
- Fran Clifton
- Gloria Butts
- Greg Brotherton
- Joseph Monda
- Philip Junkins
- Richard L. Dyksterhuis
- Rick Barrett
- Susan Eastman Jensen
- Wayne Parks



Bitter Lake Village — Urban Design Framework

1

## 1.2 Background

### 1999 Broadview - Bitter Lake - Haller Lake Neighborhood Plan

In the early 1990s, Seattle began a neighborhood planning process that involved over 20,000 residents and created plans for 38 Seattle neighborhoods. The Broadview - Bitter Lake - Haller Lake (BBH) communities came together to complete their neighborhood plan in 1999. The plan's Land Use and Housing Vision stated:

*Through the efforts of the City, community organizations, property and business owners, residents, developers, and other interested parties, Linden Ave. N from 130<sup>th</sup> to 145<sup>th</sup> will be developed to include wide, promenade style sidewalks, the Interurban Greenway Trail, new housing and small retail establishments, and a recreational and garden area surrounding the Bitter Lake Reservoir.*

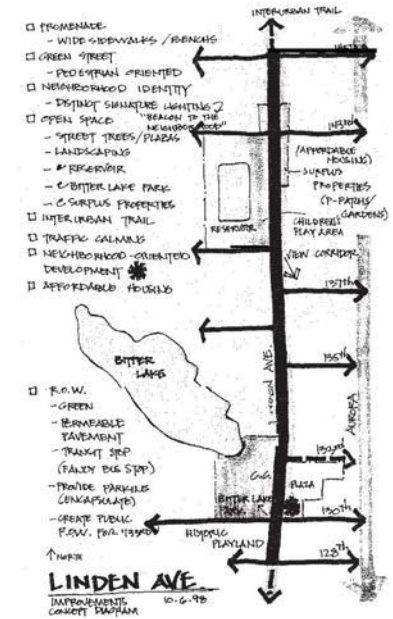


Figure 4 - Images from the 1999 neighborhood plan illustrating the desired character of the "town center."

City of Seattle — Department of Planning and Development

4

# Appendix



Figure 5 - This Development along Linden Place includes 391 low-income senior and family apartments in two buildings.



Figure 6 - The community worked with the City to improve the Bitter Lake Reservoir Open Space and to install a new P-Patch and fitness zone. (Seattle Parks)



Figure 7 - Linden Ave. N complete streets project realized the community's vision for "promenade" style street (Seattle DOT). Photo by Tom Fucoloro.

## 2.2 Recent Development

Since 1999, when the community completed their neighborhood plan, significant growth occurred along Linden Ave. N that reflected the community's neighborhood plan vision. As of December 2014, there were 1,044 new apartments on Linden Ave. N. The development at N 130th St. and Linden Ave. N also includes a small amount of neighborhood oriented businesses. There are another 148 permitted.<sup>1</sup> All of this growth has occurred in Commercial (C1 and C2) zoned areas.

The Seattle Department of Transportation (SDOT) responded to the community's vision and recent growth by constructing the Linden Ave. N Complete Street Project to improve the road between N 128th and N 145th Streets in keeping with the community's vision for a "promenade." The project improved pedestrian and bicycle safety; completed the missing Interurban Trail link; improved drainage and area lighting; and redeveloped the corridor into a "Complete Street." King County Metro and SDOT constructed improvements to bring Metro's new bus rapid transit service to Aurora Ave. N. The E Line operates between Shoreline's Aurora Village Transit Center and downtown Seattle, giving riders streamlined service to destinations along the route, including major employers, stores, medical and other services, and residential areas.

Bitter Lake Community Center and Playground and the Bitter Lake Reservoir Open Space provide open space and recreation opportunities. The play area renovations took place in 2013 and offer exciting new play equipment while meeting current accessibility and safety standards. In 2013, the community and a series of funding partnerships (including Seattle Parks Foundation, Momentum, The Trust for Public Land and Parks Opportunity Fund) improved the park and added a P-Patch and "Fitness Zone".

<sup>1</sup> New apartments on Linden Ave since 1999 = 13002 Linden Ave. N Cambridge (140 units) and New Haven (251 units); 14200 Linden Ave. N Tressa Apartments (475 units); and 14002 Linden Ave. N (178 units). Permitted = 13524 Linden Ave. N (148 units)

## 2.3 Redevelopment Potential

The Bitter Lake Village Center is largely developed, but much of it at a much lower intensity than allowed under zoning, and at a lower intensity than many of Seattle's urban villages. As described in the previous section, redevelopment is occurring along Linden Ave. N. When considering how future redevelopment could shape the Bitter Lake Village Center, it's helpful to look at properties most likely to redevelop. The map to the right highlights parcels where improvements have a significantly lower value than the property they sit on, and where owners have assembled groups of parcels for potential redevelopment. This information suggests several points.

- There is significant potential for dramatic change to the character of the area along the east side of Linden Ave. N between N 130th and N 135th Streets.
- Recent multifamily development in the area to the north along Linden Ave. N is establishing a residential character north of N 135th St. that is likely to continue with future redevelopment in that area.
- The large group of parcels south of N 135th St. presents an opportunity for a mix of residential and commercial development that could become a neighborhood center.

Consequently, the growth the area has seen since the completion of the neighborhood plan is likely to continue. With guidance the redevelopment could support the desired future character of a more vibrant and diverse mix of shops, restaurants and housing.

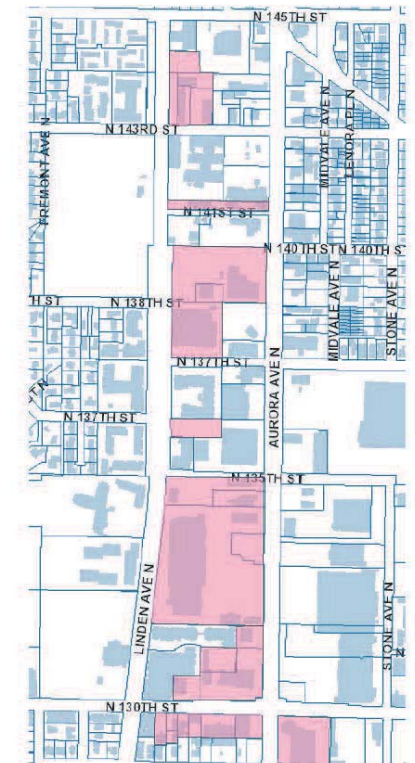


Figure 8 - The sites shade in pink are within the focus area of the UDF and have a higher potential to redevelop in the near-term.

# Appendix

## 3.2 Land Use

The Update recommends reinforcing and building on existing development to create several distinct areas along Linden Ave. N.

- Bitter Lake Village Center – a mixed-use area between N 130th St. and N 135th St.
- Walkable Residential District – a moderate-density residential area north of N 135th St.
- East / West Connections between Linden and Aurora – one-block long connections that have a great variety of uses.

### Linden Ave N Urban Design Elements



Figure 11 - Overall urban design direction developed during the Neighborhood Plan update. The Community Center and parks are strong focus of gatherings and source of pride. — Neighborhood Plan Update Vision (Image - MAKERS).

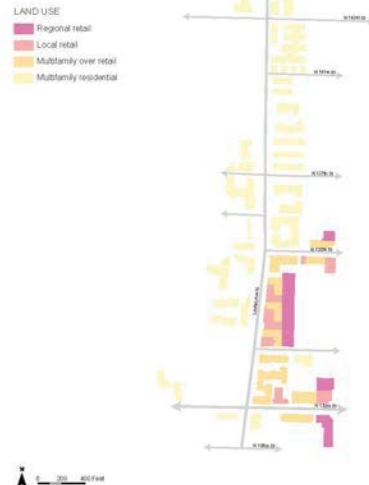


Figure 12 - The northern section of Linden Ave. N is expected to continue growing as a dense residential neighborhood, while the southern portion would become a mixed-use area. (MAKERS)

## 3.3 Bitter Lake Village Center

Along the east side of Linden Ave. N, between N 130th St. and N 135th St., encourage a high-quality, dense, mixed-use neighborhood that builds on existing and recent development.

### Land Uses

- At the street-level along the east side of Linden Ave. N between N 130th and N 135th Streets, encourage small shops and services typical to a neighborhood business district such as: restaurants, specialty retail, cafes and a bakery.
- On upper floors, residential uses are preferred and commercial uses are allowed.

### Relationship to Street

- Use development regulations to ensure active street-level uses along this portion of Linden Ave. N.
- Limit setbacks at the street level.
- Locate parking under buildings or away from street-fronts.

### Zoning and Heights

- Designate Linden Ave. as a Principal Pedestrian Street, and add a Pedestrian Designation to portions of parcels fronting Linden Ave. N.
- The Update recommended considering Neighborhood Commercial or Seattle Mixed Use, however further analysis of the code and discussions with property owners suggested that the Commercial 1 designation be retained and area-specific development regulations be developed to address circulation and design objectives.
- Allow 85' (20' more than currently allowed) with 5' minimum setback sfor portions of buildings over 45 feet.



Figure 13 - New development along Linden Ave. N can include retail clustered around a courtyard that is linked by a corridor to the destination retail on the east side that faces Aurora Ave. N (MAKERS)



Figure 14 - This graphic, from the BBH Update, identified preliminary zoning concept, with the expectation that more detailed evaluations was needed to develop the final proposal. (MAKERS)

# Appendix

## 3.6 Circulation (Continued)

### Pedestrian Circulation

The Linden Ave. N Complete Street project and the community initiated N 143rd St. Neighborhood Street Fund project greatly improved pedestrian circulation in the Bitter Lake Village Center. But more is needed to create a walkable neighborhood. Improvements need to occur not only along streets, but within the larger parcels in order to ensure sufficient pedestrian connectivity between on-site development, adjacent development and transit.

- Encourage the construction of sidewalks along all streets in between Linden Ave. N and Aurora Ave. N.
- Due to the large parcel and block size between N 125th and N135th Streets, the development regulations should ensure that the interior of the site connects to surrounding streets, in roughly the same frequency as a city block.
- Create standards that allow for flexible connections that respond to the different potential development scenarios.

### Corridor Requirements

The block between N 130th and N 135th Streets is approximately 1300' long. Existing development includes a number of interior corridors designed to facilitate access between the site interior and adjacent rights-of-way. As shown on the following page, redevelopment of the large parcel between 130th and 135th should provide a continuous corridor. This will ensure adequate internal site circulation and connections to adjacent transportation facilities, assure walkability, and promote connections between the Aurora-facing shops and retail fronting Linden Ave. N.

Figure 24 - Existing circulation - some easements - create connections through this superblock. Development standard can require that new development provide at least one interior corridor connecting the site to Linden and Aurora.

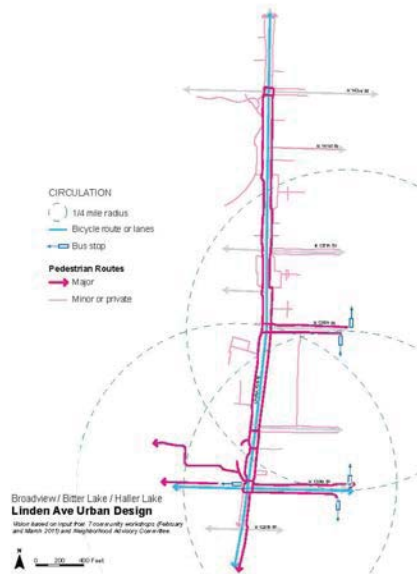


Figure 23 - Existing, private routes provide access through large parcels in the area. (MAKERS)



## 3.7 Public and Private Open Space

While the Bitter Lake Village Center has some amazing park and recreation facilities including the Bitter Lake Community Center and Playfield, Interurban Trail, and the Bitter Lake Reservoir Park, there are many gaps where there aren't nearby parks. Within the Village Center, there are opportunities to increase both public and private open space. Opportunities include:

- Incorporate more children's play areas into existing parks
- Areas without parks should be evaluated for opportunities to create new neighborhood public parks, possibly with play areas
- Work with private development to create a range of open space opportunities including play areas, gathering spaces, and gardens
- Use unimproved ROW to provide public open space



Figure 34 - There are gaps in the open space serving Bitter Lake Village Center. (Seattle Parks)



Figure 35 - In a mixed-use setting, new development can incorporate open space such as this illustration showing how outdoor seating could be incorporated as part of the interior corridor recommended on parcels larger than 8 acres. (MAKERS)



Figure 36 - New development can also provide semi-public open space to foster a lively business district.

# Appendix

This page shows examples of the different ways new development can integrate open space.

New multifamily development, particularly those located near 135th along Linden Ave. N, should consider providing on-site open space and recreation areas.

Alternatively, there may be useable undeveloped ROW in this area (on the east side of Linden Ave. N) for open space uses as illustrated in the previous section.



Figure 37 - Rooftop garden in Bitter Lake.



Figure 38 - The Cambridge Apartments provides a pedestrian connection between Linden Ave. N and Aurora, and open space.



Figure 39 - New development can also provide semi-public open space to foster a lively business district.

## 3.8 Implementation

### Zoning and Land Use Code Amendments

The UDF is an implementing element of the Broadview - Bitter Lake – Haller Lake Neighborhood Plan Update. DPD has developed legislation to implement zoning changes and amendments to development standards in the Land Use Code alongside developing this Urban Design Framework.

### Urban Design Guidelines

The existing citywide design guidelines apply to the Bitter Lake Village Center. As funding allows, DPD will work with the community to develop neighborhood design guidelines.

**EXCLUSIVELY  
REPRESENTED BY**

**Dave Speers**

Senior Vice President, Partner  
206.296.9626  
dspeers@kiddermathews.com

**Bob Conrad**

Senior Vice President, Partner  
425.922.2647  
bconrad@kiddermathews.com

[PuetzGolfSeattle.com](http://PuetzGolfSeattle.com)

[KidderMathews.com](http://KidderMathews.com)