

Appendix B: Stakeholder Engagement

Oversight Committee

An Oversight Committee met regularly throughout the Visioning Project to steer the direction of research, interviews and strategy development. The following individuals served on the Oversight Committee:

David Alvarez
Nathan Cadieux
Michael De La Rosa
Cindy Gompper-Graves
Kristy Gregg
BH Kim
Tom Lemmon
Ricardo Macedo
Bob Olivieri
Scott Parker
Bob Penner
Bill Tunstall
Claudia Valenzuela
David Wick

Stakeholder Presentations

SCEDC made presentation to the following stakeholder organizations on the Visioning Project and the key pipeline development projects from June 2013 through November 2013:

- Chula Vista City Council
- Kiwanis Club of Imperial Beach
- National City City Council
- National City Neighborhood Councils: Kimball, El Toyon, Las Palmas
- San Diego Community Planners Committee
- Port of San Diego
- Chula Vista Elementary School District
- Chicano Federation of San Diego County
- Coronado City Council
- San Diego AIA Urban Design Committee
- National City Planning Commission
- San Diego County Bicycle Coalition
- San Diego Housing Federation
- Mexican American Business Association

- American Planning Association San Diego Chapter
- Move San Diego
- CleanTECH San Diego
- Mingei Museum
- San Diego Center for International Trade Development
- San Diego Organizing Project
- Justice Overcoming Boundaries
- San Ysidro School District
- Chula Vista Community Collaborative
- Civic San Diego
- American Red Cross
- Sweetwater Union High School District
- San Diego Planning Department (Bill Fulton)
- Casa Familiar
- San Diego Tourism Authority

Interviews

ELP Advisors conducted interviews with topic experts and Oversight Committee members to assess strengths and weaknesses, opportunities and potential synergies. The following is a list of the individuals interviewed:

Interviews	
Oversight Committee Members	<ul style="list-style-type: none"> • Scott Parker, Formerly of Vibra Bank • Bill Tunstall , Retired-SCEDC Board of Directors • David Wick, National Enterprises (former Oversight Committee Member) • Emily Young, San Diego Foundation (former Oversight Committee Member)
Quality of Life	<ul style="list-style-type: none"> • David Flores, Casa Familiar
Transportation and Infrastructure	<ul style="list-style-type: none"> • Randa Coniglio, Port of San Diego • Paul Fanfera, Port of San Diego • Muggs Stoll, San Diego Association of Governments
Education and Workforce Development	<ul style="list-style-type: none"> • Mary Walshok, University of California, San Diego
Emerging Industries	<ul style="list-style-type: none"> • Joe Panetta, Biocom
Border Economy	<ul style="list-style-type: none"> • Senator Denise Moreno Ducheny, Former California State Senator, District 40 • David Mayagoitia, Tijuana Economic Development Corporation

Visioning Workshop

SCEDC hosted a day-long Visioning Workshop on October 15, 2013 to discuss South County's strengths, weaknesses, key goals and strategies, specific actions and potential partnerships to capitalize on the synergies created by its project pipeline. Over 50 individuals participated in five sessions. A panel discussion kicked off each session and was followed by a facilitated discussion among all participants.

Panel	Panelists
1. Balanced and Livable Communities	<ul style="list-style-type: none">• Todd Galarneau, The Corky McMillin Companies• Bob Penner, HomeFed
2. Education and Workforce Development	<ul style="list-style-type: none">• Victor Castillo, San Diego Center for International Trade Development• Dr. Melinda Nish, Southwestern College• Flavio Olivieri, Tijuana Economic Development Corporation• Dr. Randy Ward, San Diego County Office of Education
3. Transportation and Infrastructure	<ul style="list-style-type: none">• Larry Blumberg, San Diego Military Advisory Council• Gary London, The London Group Realty Advisors• Joel Valenzuela, Port of San Diego
4. Emerging Industries	<ul style="list-style-type: none">• Nathan Cadieux, The Corky McMillin Companies• Crystal Crawford, Ygrene Energy Fund• Michael B. Jones, The Maritime Alliance• Dr. David Shirk, UC San Diego

Marketing Messages Workshop

SCEDC hosted a half-day Marketing Messages workshop on January 23, 2013. Fifty experts, practitioners, and interested stakeholders participated. Participants divided themselves into the following five facilitated break-out groups to test and develop overall marketing themes for South County and targeted messages around specific topics.

Panel	Facilitator
1. Quality of Life	Jennifer LeSar, ELP Advisors
2. Education and Workforce Development	Aaron Byzak, UC San Diego
3. Transportation and Infrastructure	Jerine Rosato, Port of San Diego
4. Business Environment Industries	Katherine Aguilar Perez-Estolano, ELP Advisors
5. International Investment	Cecilia Estolano, ELP Advisors

Appendix C: Location Quotient Methodology and Results

Eight industries were identified through stakeholder interviews as having a strong presence in South County. Five additional industries were also analyzed based on recommendations from South County EDC. ELP Advisors calculated the location quotients for each of these industries to see how the local activity compared to the rest of the country. Employment data for the thirteen industries was collected using a combination of relevant NAICS codes.¹ The NAICS codes included in each industry are as follows:

Advanced Manufacturing

- 325 Chemical Manufacturing
- 333 Machinery Manufacturing
- 334 Computer and Electronic Product Manufacturing
- 3391 Medical Equipment and Supplies Manufacturing

Aerospace & Drones

- 3345 Navigational, Measuring, Electromedical, and Control Instruments Manufacturing
- 3364 Aerospace Product and Parts Manufacturing

Boat Building

- 336611 Ship Building and Repairing
- 336612 Boat Building

Computer and Electronics Manufacturing

- 334 Computer and Electronic Manufacturing

Cyber & Homeland Security, Defense

- 5415 Computer Systems Design and Related Services
- 5416 Management, Scientific, and Technical Consulting Services
- 5616 Investigation and Security Services

Energy Efficiency & Clean Energy

- 221111 Hydroelectric Power Generation
- 221117 Biomass Electric Power Generation
- 221115 Wind Electric Power Generation
- 221113 Nuclear Electric Power Generation
- 221114 Solar Electric Power Generation
- 221116 Geothermal Electric Power Generation
- 237130 Power and Communication Line and Related Structures Construction
- 334413 Semiconductor and Related Device Manufacturing
- 54171 Research and Development in the Physical, Engineering, and Life Sciences

Fabricated Metal Product Manufacturing

¹ Advanced Manufacturing as an industry can be defined several ways. This set of calculations looked at four key categories of manufacturing: Chemical Manufacturing; Computer and Electronic Manufacturing; Machinery manufacturing; and Medical Equipment and Supplies Manufacturing.

Timian, J. (2013). *New Jersey Department of Labor and Workforce Development*. [Presentation]. Retrieved from http://lwd.state.nj.us/labor/lpa/pub/empecon/advanced_%20manufacturing.pdf

- 332 Fabricated Metal Product Manufacturing
- Food Processing & Distribution
 - 311 Food Manufacturing
 - 4244 Grocery and Related Product Wholesalers
- Healthcare
 - 62 Healthcare and Social Assistance
- Motor Vehicle Parts Manufacturing
 - 3363 Motor Vehicle Parts Manufacturing
- Pharmaceutical and Biomedical Manufacturing
 - 325411 Medicinal and Botanical Manufacturing
 - 325412 Pharmaceutical Preparation Manufacturing
 - 334510 Electromedical and Electrotherapeutic Apparatus Manufacturing
 - 3391 Medical Equipment and Supplies Manufacturing
(not including Dental Laboratories NAICS 339116)
- Plastics Product Manufacturing
 - 3261 Plastics Product Manufacturing
- Tourism
 - 487 Scenic and Sightseeing Transportation
 - 5615 Travel Arrangement and Reservation Services
 - 712 Museums, Historical Sites, and Similar Institutions
 - 713 Amusement, Gambling, and Recreation Industries
 - 7211 Traveler Accommodation
 - 7212 RV (Recreational Vehicle) Parks and Recreational Camps

South County's employment for each industry was estimated using the 2011 County Business Patterns zip code level data. The following are the zip codes included in the analysis as representative of South County.

- 91902 Bonita
- 91908 Bonita
- 91909 Chula Vista
- 91910 Chula Vista
- 91911 Chula Vista
- 91912 Chula Vista
- 91913 Chula Vista
- 91914 Chula Vista
- 91915 Chula Vista
- 91921 Chula Vista
- 91932 Imperial Beach

91933 Imperial Beach
 91947 Lincoln Acres
 91950 National City
 91951 National City
 92118 Coronado
 92143 San Ysidro
 92154 Otay Mesa
 92173 San Ysidro
 92178 Coronado
 92139 Paradise Hills

The 2011 County Business Patterns zip code data set provides the number of establishments in an industry broken down by employment size. For example, in the Chula Vista zip code of 91910, there are 5 establishments with 100-249 employees in the Healthcare & Social Assistance industry.

To estimate the number of employees in an industry within South County, ELP Advisors applied the national average for establishment size within each category. The national average was calculated by dividing the total number of establishments within each employment size class by its total number of paid employees. This national average is representative of establishments in all industries. The average number of employees for a company within each employment size class is indicated in the table below.

National Average of Establishment Size	Number of establishments	Paid employees	Average Establishment Size
All establishments	7,354,043	113,425,965	--
Establishments with 1 to 4 employees	4,037,610	6,917,360	1.7
Establishments with 5 to 9 employees	1,377,694	9,123,215	6.6
Establishments with 10 to 19 employees	936,463	12,636,569	13.5
Establishments with 20 to 49 employees	623,862	18,775,689	30.1
Establishments with 50 to 99 employees	211,393	14,499,464	68.6
Establishments with 100 to 249 employees	118,994	17,787,203	149.5
Establishments with 250 to 499 employees	30,108	10,340,650	343.5
Establishments with 500 to 999 employees	11,144	7,607,564	682.7
Establishments with 1,000 employees or more	6,775	15,738,251	2323

The national averages were then applied to the industry specific data for South County to estimate the number of jobs. For example, in the United States the average employment-size of establishments within the 100-249 employees category is 149.5 employees. The national average was then multiplied by the number of establishments within each South County industry, separated by employer size.

To build on the previous example of 5 healthcare establishments in Chula Vista's 91910 zip code that have 100-249 employees, 5 would be multiple by the average size of 149.5, resulting in the estimate that that are 746 employees located in 91910 that work in healthcare establishments of 100-249

employees in size. For each industry, the national average was multiplied by the number of South County establishments within the employment size category.

National level employment within each industry was compiled using US Bureau of Labor Statistics March 2011 data.

The analysis is limited by the employment data available for the specific geography of South County and industries of interest. The total number of jobs in South County is the sum of the employee count for each South County zip code in March 2011. This data was collected using the US Census ZIP Code Business Patterns. For three of the zip codes within South County (91921, 91947, 92143) total employment data was not available. To resolve this, an estimate was made for each zip code using the data on number of establishments by employer-size class and the national average for establishment size within each class. It should be noted that all three zip codes has very few establishments (of any industry) located within them, resulting in very low employment estimations.

The industry location quotients were calculated as:

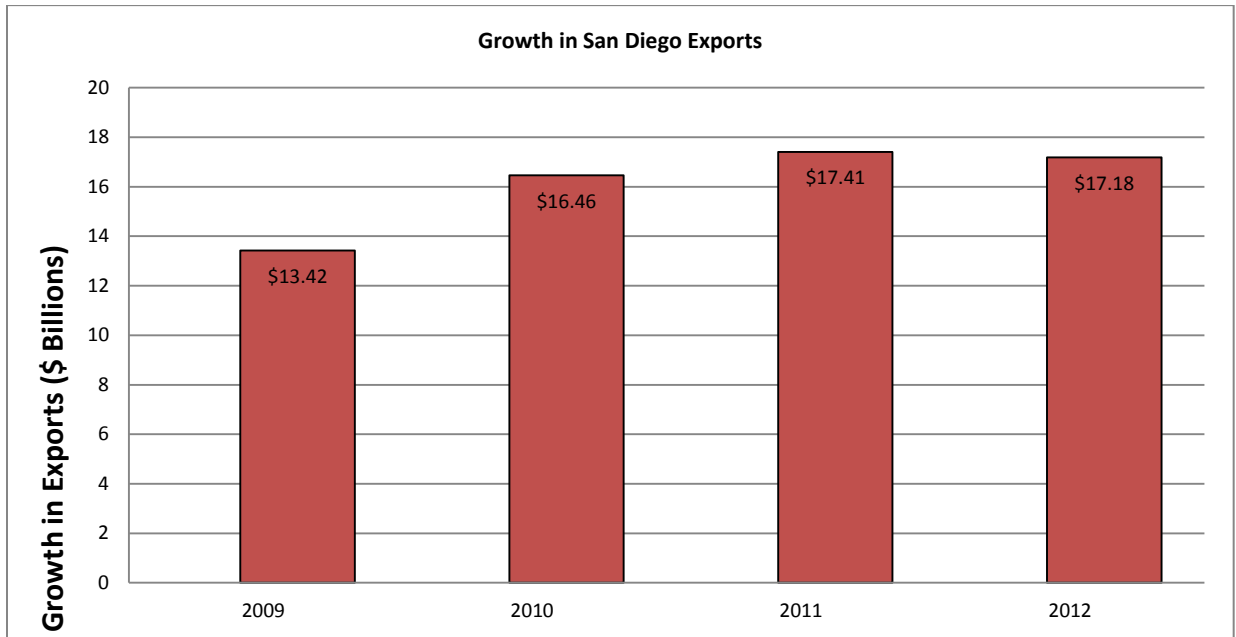
$$= (\text{South County Employment in Industry} / \text{Total Employment in South County}) / (\text{National Employment in Industry} / \text{Total National Employment})$$

The findings from the location quotient calculations were somewhat consistent with qualitative data captured from interviews and the survey. A location quotient between .85 and 1.15 is assumed to be on par with the state or nation. A value greater than 1.15 indicates stronger industry employment locally relative to the state or country.² It is important to note that an industry can have a large presence in South County, but still have a low location quotient because it is not strong relative to other geographies.

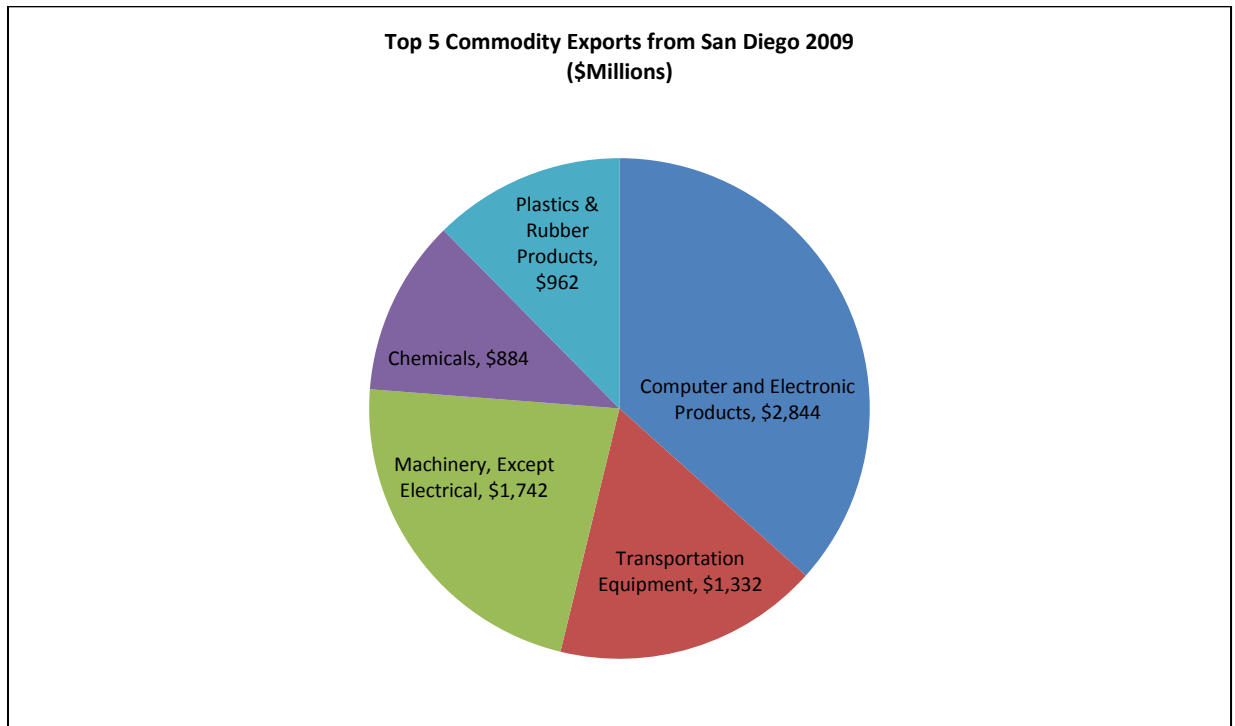
The Energy Efficiency & Clean Energy industry is identified as strong industries for the sub-region, but was not found to have a strong location quotient. A possible explanation for location quotient being lower than expected is the variation in industry definition and data availability. In the category of Energy Efficiency & Clean Energy, much of the energy efficiency work is done in a wide variety of large sectors, such as construction, that do not focus primarily on energy efficiency. Including employment from all of the loosely related industries would inflate the data and were therefore omitted. As a result the finding is lower than expected. Cyber & Homeland Security is likely to have low location quotients because data is not made readily available, so calculations are based on incomplete data.

² The University of Minnesota. (2012). *State and Local Policy Program*. Humphrey School of Public Affairs. Retrieved from http://www.hhh.umn.edu/centers/slp/economic_development/understand_your_industry/quantitative_analysis.html

Appendix D: San Diego Export Data

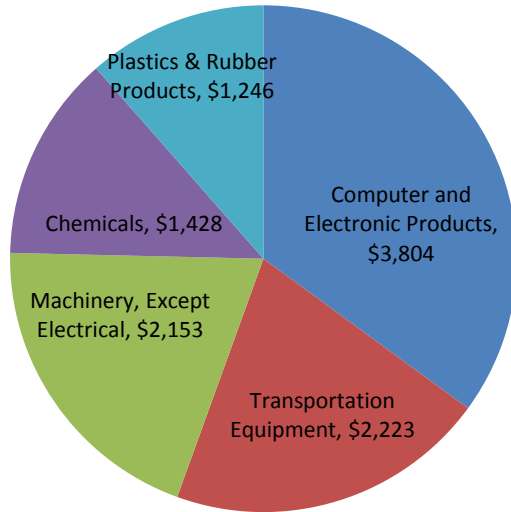


Source: U.S. Department of Commerce, International Trade Administration, Metropolitan Export Series (Data provided by Victor Castillo, Center for International Trade Development (CITD) Southwestern College)



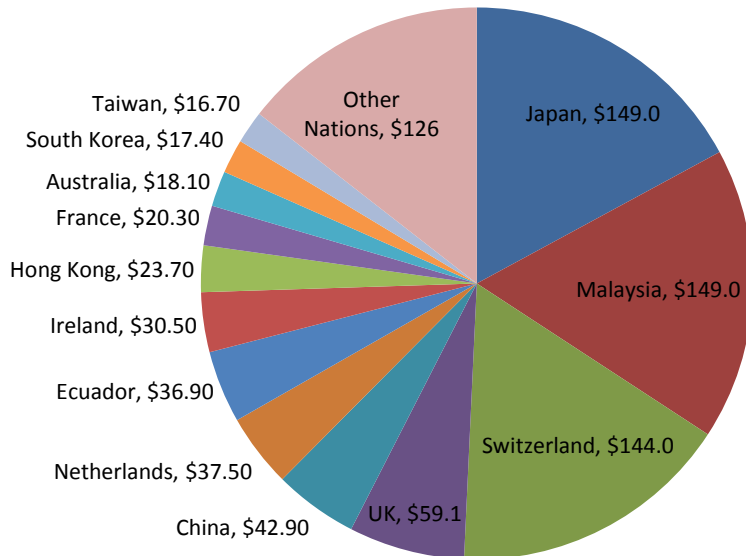
Source: U.S. Department of Commerce, International Trade Administration, Metropolitan Export Series (Data provided by Victor Castillo, Center for International Trade Development (CITD) Southwestern College)

**Top 5 Commodity Exports from San Diego, 2012
(\$Millions)**

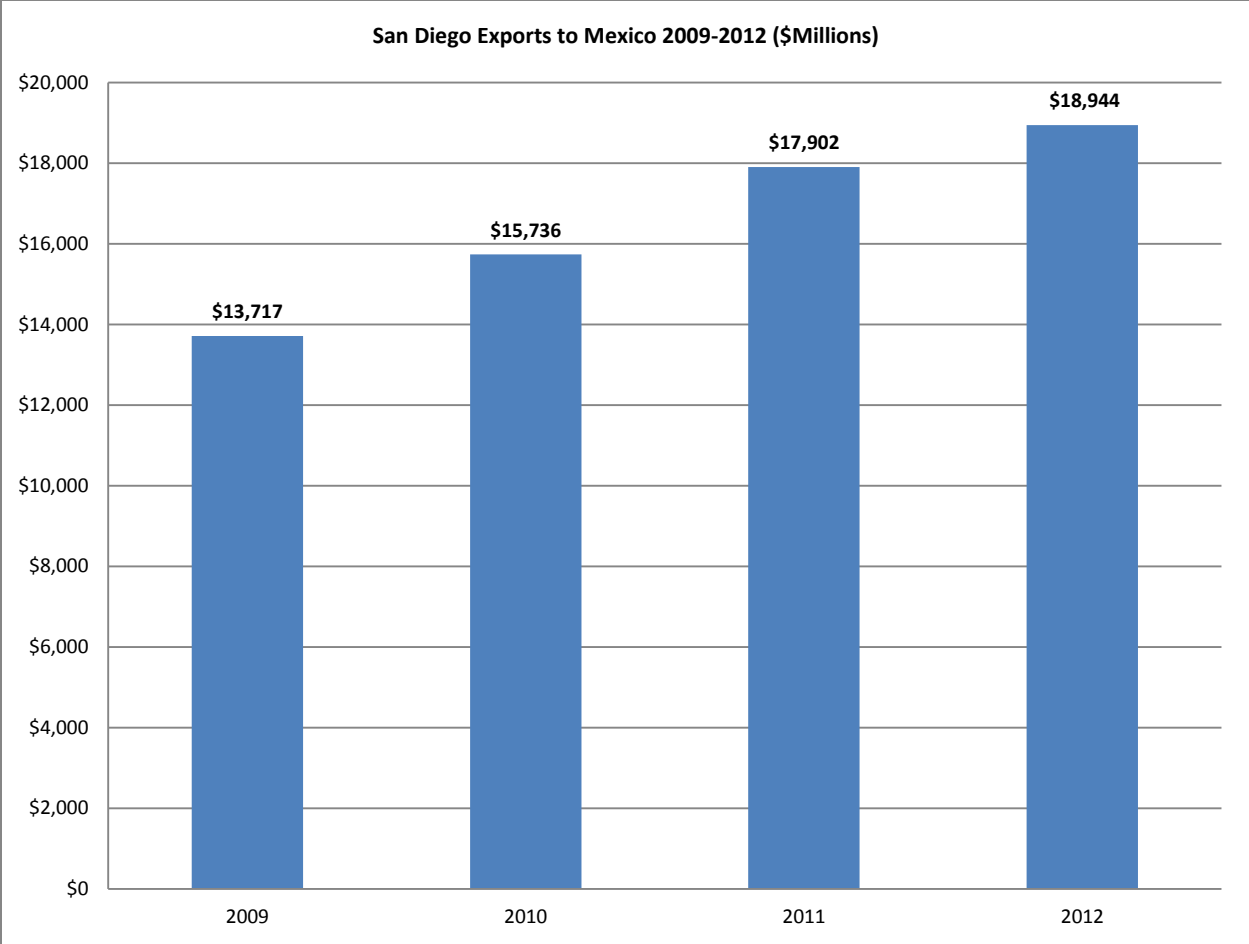


Source: U.S. Department of Commerce, International Trade Administration, Metropolitan Export Series (Data provided by Victor Castillo, Center for International Trade Development (CITD) Southwestern College)

**Top 5 San Diego Export Markets Other Than Mexico 2012
(\$Millions)**



Source: U.S. Department of Commerce, International Trade Administration, Metropolitan Export Series (Data provided by Victor Castillo, Center for International Trade Development (CITD) Southwestern College)



Source: U.S. Department of Commerce, International Trade Administration, Metropolitan Export Series (Data provided by Victor Castillo, Center for International Trade Development (CITD) Southwestern College)

Appendix E: Regional Tourist Attractions

Regional Tourist Attractions ³	
Art	<ul style="list-style-type: none"> • Dance Art Center • Art Wheel School and Studio • South Bay Dance Academy • Sleep Train Amphitheater
Museums	<ul style="list-style-type: none"> • Castle Done Mine Museum • San Diego Air and Space Museum • Pacific Southwest Railway Museum • Bonita Museum and Cultural Center • Alpine Historical Society • IVC Desert Museum • Motor Transport Museum • Chula Vista Heritage Museum
Beaches	<ul style="list-style-type: none"> • Loma Verde Family Aquatic Center • J Street Marina Park • Imperial Beach • Dunes Park • Imperial Beach Pier • Silver Beach • Silver Strand State Beach
Regional Beaches	<ul style="list-style-type: none"> • Coronado Beach • Bay View Park • Sunset Cliffs • Fiesta Island • Ocean Beach • Gator Beach • Mission Beach • Kellogg's Beach
Limited- Service Restaurant	<ul style="list-style-type: none"> • Las Americas Premium Outlets
Hotels (except Casino Hotels) and Motels	<ul style="list-style-type: none"> • El Primero Hotel • Hercor Urban Boutique • Best Western Plus • Comfort Inn & Suites • Holiday Inn Express & Suites San Diego Otay Mesa • Palomar Inn • Days in Chula Vista

³ San Diego Regional Economic Development Council. (2013). *Key Industries: Convention and Tourism*. San Diego, CA. Retrieved from <http://www.sandiegobusiness.org/industry/tourism>

Regional Tourist Attractions³

	<ul style="list-style-type: none"> • La Quinta Inn San Diego Chula Vista • Good Nite Inn • Best Western Chula Vista • Viejas Hotel
Amusement and Theme Parks	<ul style="list-style-type: none"> • Aquatica San Diego • Regional • Waterfront Park • Half off Theme Parks LLC • Belmont Park • Knotts Soak City USA • Sky High Sports • Inflatable World • Giant Dipper Coaster • Haunted Hotel • Funbelievebale
Regional Tourism Attractions	<ul style="list-style-type: none"> • Living Coast Discovery Center
Golf Courses and Country Clubs	<ul style="list-style-type: none"> • Bonita Driving Range • Eastlake Country Club • Chula Vista Golf Course • National City Golf Course • Salt Lake Creek Golf Course • Salt Creek Golf Club • Jr South Bay Gold Driving Range • OJ Amaya Golf Academy • San Diego Country Club
Drinking Places (Alcoholic Beverages)	<ul style="list-style-type: none"> • Eastlake Tavern & Bowl • Lion's Den • Archway Lounge • Salty Frog • The Canyon Sports Pub and Grill • Valentino's Lounge • Venga Venga Cantina and Tequila Bar • Mr. D's Cocktail Lounge • Crystal Love • Wild Wooly's Saloon
Food Service Contractors/Cafeterias, Grill Buffets, and Buffets/Caterers	<ul style="list-style-type: none"> • Tacos Delicioso Catering • El Tapatío Catering • Jaramillo Catering • La Tequila
Other Regional Attractions	<ul style="list-style-type: none"> • USS Midway Museum • Southern California CityPASS

Regional Tourist Attractions³

- San Diego Zoo
- Sea World San Diego
- Dine with Shamu
- Belmont Park