

# FIVE-YEAR ECONOMIC DEVELOPMENT WORK PLAN

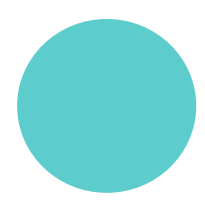
## SOUTH SAN DIEGO REGION

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EST. 1989



**SCEDC**  
South County Economic  
Development Council



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# EXECUTIVE SUMMARY


## **Executive Summary**

This Work Plan represents a unified vision that focuses on economic development strategies created by and with businesses, residents, visitors, workers, investors, and key stakeholders. It threads various development opportunities in the region, which captures and builds on the synergy among these projects to promote economic growth, increases the number of high-quality jobs in South County, and enhances the sub-region's quality of life.

South County's competitive assets – including its abundance of land resources; opportunities to locate large and medium-sized businesses in new and competitively priced spaces; a young, diverse, and skilled workforce; and a pipeline of development projects currently under construction or planned for the next five years – place it in a prime position to sustain a robust level of growth. With its proximity to the US-Mexico border, excellent transportation infrastructure, and engaged and diverse business and civic cultures, South County is poised to become a center for future job growth in San Diego County.

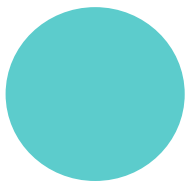
South County's key industry clusters of aerospace, advanced manufacturing, healthcare, food processing and distribution, tourism, and maritime related businesses are a good starting point for promoting stable, well-paying jobs in the sub-region. South County's robust pipeline of private development and public infrastructure improvements represent billions of dollars of collective investment. These pipeline projects generate synergies that can expand the economic benefits of this investment for South County residents, workers, businesses, and investors for decades to come.



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- The \$900 million redevelopment of Brown Field in Otay Mesa presents an opportunity to target demand-driven career technical training in aviation from the ground-up. This customized training curriculum can be integrated into an overall sector-specific workforce development program tailored to meet the needs of South County's aerospace industry.
  - The \$4 billion Millenia project, Cross Border Express (formerly known as Cross Border Terminal), Otay II-SR11 project, and Chula Vista four-year university together generate synergies to market South County as a prime location for the regional headquarters and production centers of major advanced manufacturing firms. Degree programs in engineering and industrial product design and certificate programs for technical and mechanical skills can supply the talent needed to support an advanced manufacturing center.
  - South County stands at the crossroads of international commerce. With major projects under construction to reduce border wait times and enhance air travel options, the sub-region is well-positioned to develop a bi-national Global Executive MBA program at the proposed four-year university in Chula Vista that offers specializations in international trade and business.
  - New transit linkages between South County's waterfront and its eastern population and industrial centers create an opportunity to capture a good share of the 6,000 new jobs expected to be created by San Diego's Blue Economy. South County can capitalize on this growing sector by providing training and internships in maritime activities, marine biology, climate change adaptation, wastewater management, and coastal resource conservation. Vacant available space can be used to build an inland maritime training center, incubator, and research center in a partnership with Southwestern College and the future four-year university in Chula Vista.
  - Synergies among the Chula Vista Bayfront project and the Bayshore Bikeway could be coupled with other local assets, such as the South San Diego Bay National Wildlife Refuge, the Living Coast Discovery Center, and the Tijuana River Estuary, to market South County as an eco-tourism destination.

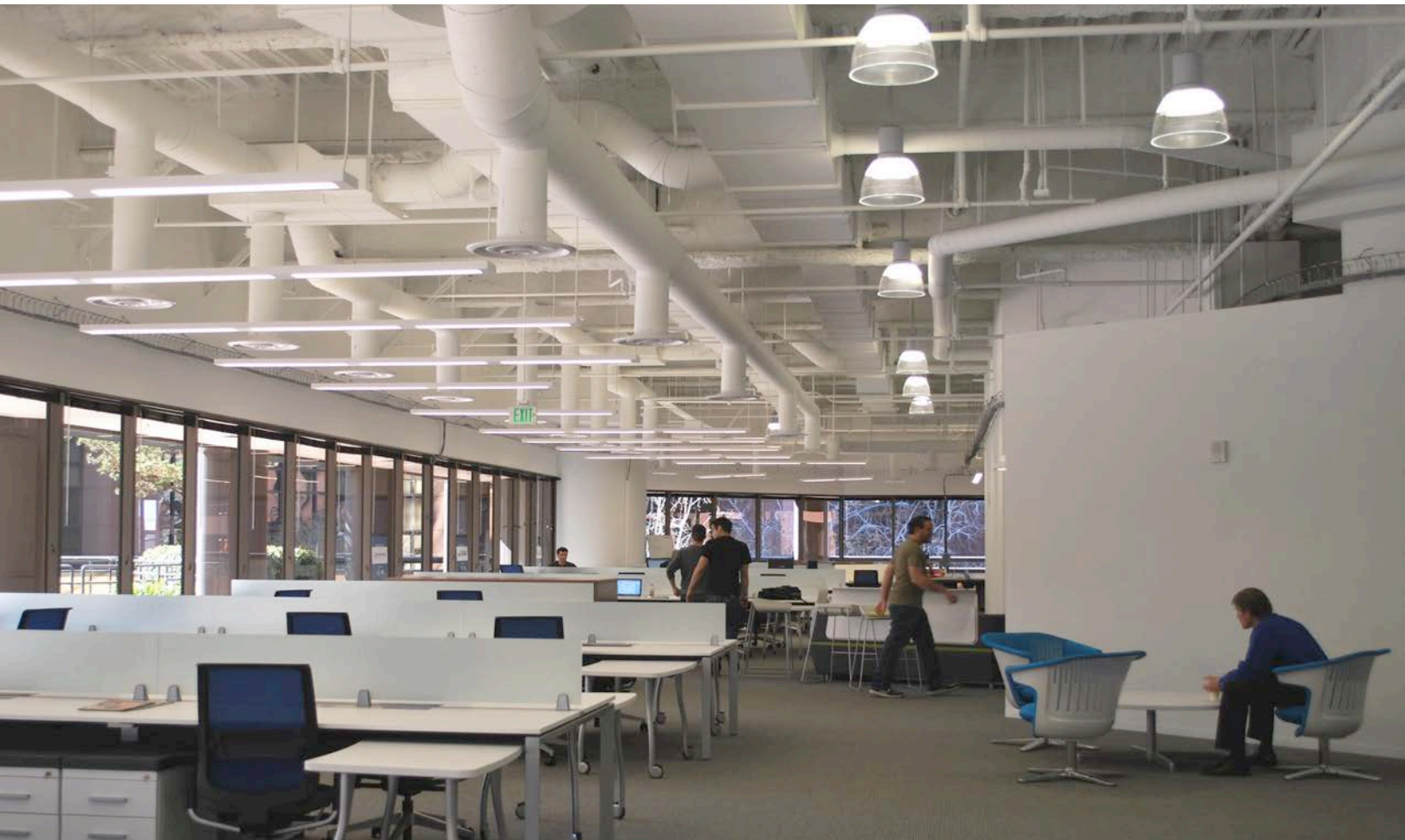
The South County Economic Development Council (SCEDC) is committed to working with partners to maximize the advantages of ongoing development projects, promote the next generation of innovators, build on existing and emerging industry clusters, expand international trade and commerce, and bolster the tourism industry. This Work Plan identifies strategies and action steps that will enable the SCEDC to create, build upon, and link economic development projects and opportunities in South County.

## Strategy #1: Promote the Innovation Economy



- Action Step #1** Promote the creation of incubators and accelerators
- Action Step #2** Develop technical training programs at community colleges to meet the specialized needs of the aerospace, maritime, and aviation industries
- Action Step #3** Market advanced manufacturing as a skilled and high paying career pathway to local high school and community college students
- Action Step #4** Explore the establishment of a polytechnic academy to train young people for careers in advanced manufacturing
- Action Step #5** Develop degree programs at the Chula Vista four-year university in fields related to advanced manufacturing
- Action Step #6** Promote South County as a center for Blue Economy jobs
- Action Step #7** Develop internships and training and linked-learning programs in Blue Economy fields

South County start-up





## **Strategy #2: Build on Industry Clusters**

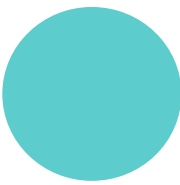
- Action Step #1**      Develop a small manufacturers' assistance, retention, and attraction program
- Action Step #2**      Create, maintain, and publicize a list of available office and industrial space for large aerospace, advanced manufacturing, and food processing and distribution firms
- Action Step #3**      Develop a global "Fam Trip" tour program to familiarize targeted firms with South County assets and economic opportunities
- Action Step #4**      Promote local and bi-national supply chains in aerospace and advanced manufacturing
- Action Step #5**      Articulate training and career pathways for South County residents to progress from entry level to credentialed to professional employment in the healthcare sector
- Action Step #6**      Recruit the headquarters of a major food processing and distribution company
- Action Step #7**      Recruit advanced manufacturing headquarters and production facilities

## **Strategy #3: Expand International Trade and Commerce**

- Action Step #1**      Promote South County as a target for foreign direct investment and cross-border commerce
- Action Step #2**      Explore the creation of a border business conference center
- Action Step #3**      Develop a global executive MBA program at the Chula Vista four-year university in partnership with a major Mexican university

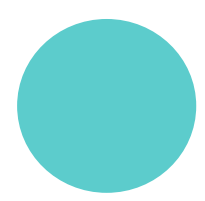
## **Strategy #4: Grow Our Tourism Industry**

- Action Step #1**      Implement an eco-tourism marketing campaign
- Action Step #2**      Promote new eco-tourism efforts
- Action Step #3**      Design training programs for higher-paying jobs in the eco-tourism and hospitality industry



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## Introduction

The South County Economic Development Council (SCEDC) has prepared this Five Year Economic Development Work Plan to capture and build on the synergies created by the major development opportunities underway or planned for the sub-region in the near term. South County's land availability, strong existing industry clusters, international trade orientation, and dynamic population make it well-positioned to achieve robust growth as the regional economy emerges from the Great Recession. The SCEDC aims to leverage these synergies and assets to grow the businesses that will create good-paying jobs that South County needs in order to address areas of persistent poverty that remain in the sub-region.

The SCEDC is a nonprofit organization established in 1989 by businesses, community organizations, and civic leaders in the South San Diego County Region. Since its inception, the SCEDC has played a critical role in building and supporting the bi-national economy, creating new business opportunities, and improving and enhancing the quality of life for residents of the area. The SCEDC presents this Work Plan as a unified vision that threads together the myriad opportunities in South County into an overarching framework for action.

## The Vision

In the near term, the SCEDC will leverage South County's competitive assets, location, and business climate to make it a prime locale for a diverse and dynamic population of innovators, makers, and entrepreneurs to create, invest, trade and prosper.



## **A Place at the Crossroads**

South County encompasses the cities of Chula Vista, National City, Imperial Beach, and Coronado, and the communities of Otay Mesa and San Ysidro within the City of San Diego. Situated in the southern portion of San Diego at the most southwesterly corner of the United States, and encompassing the busiest border crossing in the world, South County is a desirable place in which residents, visitors, and businesses can create, invest, trade, and prosper. South County's multinational and multilingual population; land availability and affordability; and proximity to Baja California, the Pacific Ocean, and local educational and research institutions present significant economic development opportunities for the region.

The San Diego skyline



South County's diverse population is an attractive attribute for export-oriented businesses looking for a multilingual, culturally competent workforce

## A Population Poised for Opportunity

One of South County's greatest assets is its people. Its population is young, diverse, and multilingual. South County residents younger than 30 years old comprise 46 percent of the population,<sup>1</sup> giving the region an edge in connecting its promising talent pool with emerging companies seeking permanent locations.<sup>2</sup>

South County's diverse population is an attractive attribute for export-oriented businesses looking for a multilingual, culturally competent workforce. South County's population exemplifies the leading edge of this nation's diversity, with Latinos comprising 57 percent of the population, non-Hispanic whites at 23 percent, Asian American/Pacific Islanders at 13 percent, and African-Americans at 4 percent.<sup>3</sup> Foreign-born residents make up 28 percent, which is slightly higher than the percentage of foreign-born residents in the State of California (26 percent) and more than double that of the foreign-born population rate of the United States.<sup>4</sup> The diversity of South County's population is reflected in the 32 languages spoken in the sub-region's households.<sup>5</sup>

South County also enjoys access to quality public schools,<sup>6</sup> community colleges, and regional universities. Residents boast high school graduation and college attendance rates that surpass national averages.<sup>7</sup> Southwestern College, San Diego State University, University of San Diego, UC San Diego, Point Loma Nazarene University, and South County's various private universities are educational launching pads for the region's workforce and act as hubs for start-up companies and budding entrepreneurs. South County's efforts to locate a four-year university in Chula Vista on land set aside specifically for higher education signals the sub-region's continuing commitment to create and support the institutions that build a dynamic and innovative local economy.

South County's vibrant and highly-skilled immigrant labor force also presents an opportunity to reinvigorate its entrepreneurial sector.<sup>8</sup> Immigrants form businesses at more than double the rate of non-immigrants, and their businesses are more likely to export their goods and services compared to non-immigrant businesses.<sup>9</sup> They expand the workforce<sup>10</sup> and prop up the demand for housing.<sup>11</sup> They also revitalize commercial corridors, streetscapes, and neighborhoods, contributing to the overall vitality of a growing economy.<sup>12</sup>



Chula Vista Hills Elementary School

## Abundant Land for Jobs

South County boasts a readily available supply of affordable land for manufacturing and commercial enterprises, particularly in Chula Vista, Otay Mesa, and East Otay Mesa. The fully-entitled Millenia project will make available two million square feet of Class A office space in Chula Vista while Otay Mesa currently hosts over two million square feet of vacant undeveloped land.<sup>13</sup> The redevelopment of Brown Field will include over 1.3 million square feet of industrial use. In addition, Otay Mesa's recently-approved community plan update sets aside a quarter of the land for industrial uses to encourage growth and allows for a broader range of business parks and manufacturing facilities to locate in the area. This will create a hub of industrial activity that supports border-related commerce as well as industries that are independent of the border economy. The plan reserves 400 acres for "heavy industrial" use and an additional 1,300 acres for "flexible industrial" use, meaning the types of uses allowed can change with the evolving global economy.<sup>14</sup>

The East Otay Mesa Specific Plan covers over 3,000 acres of unincorporated San Diego County and sets aside 2,110 acres for a modern industrial and business center, as well as a variety of complementary industrial uses. The Technology Business Park District offers opportunities for campus-style business park development. In addition, light industrial, heavy industrial, and mixed industrial districts provide for a full-range of manufacturing, warehousing, and logistics uses.<sup>15</sup> With some of the largest viable spaces for manufacturing facilities remaining in San Diego County, South County has an edge in landing the companies that can create strong, middle-class jobs.<sup>16</sup>

With some of the **largest** viable spaces for **manufacturing facilities** remaining in San Diego County, South County has an **edge** in landing the companies that can create **strong, middle-class jobs**

Land Surrounding the Chula Vista Bayfront



Representatives from key sectors, including business, finance, education, health care, technology, and science participated in the Visioning Project alongside leading civic and community groups

## The Approach

To maximize and coordinate the benefits and opportunities generated by current, ongoing, and future development projects in South County, the SCEDC launched the South County Visioning Project (Visioning Project) in June 2013. The SCEDC spearheaded the Visioning Project to gather information on and identify stakeholder and community priorities to shape the creation of this Five Year Economic Development Work Plan (Work Plan).

The SCEDC managed and led the Visioning Project and the creation of this Work Plan with the expertise and assistance of economic development consulting firm Estolano LeSar Perez Advisors (ELP Advisors), an oversight committee comprised of 14 active SCEDC members, a committee of topic experts, and the thoughtful and meaningful engagement of the public. To raise public awareness of and to promote public participation in the Visioning Project, the SCEDC executed a robust community engagement process. Representatives from key sectors, including business, finance, education, health care, technology, and science participated in the Visioning Project alongside leading civic and community groups, public sector partners, and elected officials.

The SCEDC presented the Visioning Project to over 30 stakeholder organizations, surveyed 4,595 individuals, conducted in-depth interviews with experts and stakeholders, convened a day-long workshop to discuss synergies among current and planned development projects in the region, and led a focus group to test potential marketing messages for a regional marketing plan that will complement this Work Plan.

## South County Speaks – A Survey to Envision the Future

To move forward, South County must move together. Therefore, a key element of the South County Visioning Project involved surveying residents, workers, business owners, college students, and visitors about the investment strategies and specific actions they believe will most effectively build an economically prosperous South County. Surveys were conducted from June through November in 2013, and were offered in 11 languages. The surveys were given in a variety of formats, including in-person interviews, traditional paper form, and via an online portal.<sup>17</sup> The SCEDC also used the survey to test general awareness of South County's leading industry clusters. The survey provided a baseline that was used to craft marketing messages related to important job-generating sectors.

Some of the key findings that informed this Work Plan and helped shape the recommended strategies include the following:

- Survey respondents ranked an “Invest in People” strategy as the highest priority among the four strategies tested. This strategy focuses on creating an educated and highly skilled workforce in order to attract innovative businesses and industries, to facilitate the invention of new products, and to increase the number of high-wage jobs.
- An “Invest in Emerging Industries” strategy ranked second. This strategy focuses on identifying the industries and businesses that have a good chance of growing in South County and creating high quality jobs for the community. The strategy builds on the area's workforce, existing economic strength, and prime location.
- Survey respondents ranked health care and energy efficiency/clean energy as the two most important industries that South County should focus on trying to attract and grow. Tourism and advanced manufacturing ranked in the next tier of importance.
- When it comes to upgrading land ports, sea ports, and airports, survey respondents overwhelmingly ranked investments in upgrading border crossings as the highest priority.

To move forward, South County  
must move together



## Key Industry Clusters

South County's existing and emerging industry clusters are the foundation for future job creation and economic growth.

**Industry clusters** are “geographic concentrations of interconnected companies, specialized suppliers, service providers, firms in related industries, and associated institutions in a particular field that compete but also cooperate.”<sup>18</sup> **Traded clusters** are those that produce goods and services for sale outside of the region; these goods and services compete with those produced by other regions and other countries.<sup>19</sup> Traded-sector companies tend to *cluster* because they draw competitive advantage from proximity to a skilled workforce, specialized suppliers, and a shared base of sophisticated knowledge about their industry. According to noted Harvard Business School Professor Michael E. Porter, traded clusters are “the underlying drivers of prosperity” because they bring in new dollars to a region.<sup>20</sup>

A central element of the Visioning Project was to identify South County's key industry clusters in order to map out a strategy for building on the sub-region's strengths and position it to promote the emergence of new clusters that generate good-paying jobs. In addition to surveying South County stakeholders on the key industries they believe are most important, the Visioning Project interviewed experts and industry leaders and analyzed over a dozen different sectors to evaluate South County's relative advantages and identify opportunities for each industry. The following key industry clusters were identified through these interviews along with an analysis of locational correlation of employment,<sup>21</sup> wage data, geographic advantages, and South County's other strengths and assets:

1. Aerospace
2. Advanced Manufacturing
3. Healthcare
4. Food Processing and Distribution
5. Tourism
6. Maritime

Each industry is discussed in greater detail below. This analysis lays the foundation for identifying synergies between existing clusters, sub-regional assets, and development projects currently under construction or planned for construction in the near term.



South County's existing and emerging industry clusters are the foundation for future job creation and economic growth



UTC Aerospace Systems

## **Aerospace**

South County has long been a stronghold of aerospace employment, with jobs evolving and changing to meet the industry's successive iterations. South County boasts a high concentration of employees in the industry, with a location quotient of 4.00,<sup>22</sup> indicating that South County has four times the concentration of aerospace jobs when compared to the rest of the nation. The sub-region's 9 aerospace firms employ 2,632 workers in South County.

The aerospace industry in South County provides the following products and services:<sup>23</sup>

- Aircraft parts and auxiliary equipment manufacturing
- Search, detection, navigation guidance, aerospace and nautical system, and instrument manufacturing
- Support activities for air transportation
- Airport operations
- Guided missile and space vehicles



## South County can build on its existing strengths in the cluster by marketing the availability of land for new and expanded operations

South County's aerospace cluster produces components for military, commercial, and regional aircraft. For example, UTC Aerospace's Chula Vista location focuses on the production of aero structures for aircraft assembly. Other South County firms build aircraft engines and components.

The jobs within this industry are well-paid and provide workers with a stable source of income. For example, the national median hourly wage in the Aerospace Products and Parts sector is \$31.97.<sup>24</sup> Approximately one-third of the jobs within this sector are production occupations, which on average earn \$23.31 per hour.<sup>25</sup> This wage is especially high compared to the \$16.70 hourly average of a production worker across all sectors.<sup>26</sup>

Aerospace jobs are supported by companies of all sizes. South County's aerospace companies range in size from microbusinesses to large companies of more than 1,000 employees.<sup>27</sup> South County's large industry employers, including UTC Aerospace Systems, anchor the industry to the region. However, there is also a strong base of smaller suppliers and a rapidly growing number of start-ups in San Diego.<sup>28</sup>

South County can build on its existing strengths in the cluster by marketing the availability of land for new and expanded operations, promoting enhanced supply chains within the sub-region and across the border with Tijuana, and by developing technical training programs tailored to meet the needs of this critical industry.



South County aerospace start-up

## Advanced Manufacturing

Advanced manufacturing is a family of activities that (a) depend on the use and coordination of information, automation, computation, software, sensing, and networking, and/or (b) make use of cutting edge materials and emerging capabilities enabled by the physical and biological sciences, e.g., nanotechnology, chemistry, and biology. This involves both new ways to manufacture existing products as well as new products emerging from new advanced technologies.<sup>29</sup> Policymakers have placed greater emphasis on promoting advanced manufacturing because it provides an important opportunity for high-quality, good-paying jobs for middle-skilled workers. Valuable synergies are created by the location of production processes in close proximity to design and engineering functions. This results in a greater capacity for faster and deeper innovation in the manufacturing process that enables global competitiveness. South County's manufacturing industry is comprised of 353 firms that provide 8,917 jobs at an average annual wage of \$48,500.<sup>30</sup> By contrast, the average annual wage for advanced manufacturing jobs in California is \$90,935.<sup>31</sup> Within the broad category of manufacturing, advanced manufacturing<sup>33</sup> as a sub-sector employs 1,028 people in South County. Currently, South County hosts 61 advanced manufacturing employers with a high concentration in the computer and electronics production sectors. The industry is mostly comprised of micro- to medium-sized businesses that range in size from either 0-4 or 20-49 employees, but there are also two large employers, each with 100-249 employees.<sup>34</sup>

The following products are produced by this cluster in South County:

- Audio and video equipment manufacturing
- Electronic coils, transformers, and inductors
- Printed circuit assembly manufacturing
- Other electronic component manufacturing
- Plastics material and resin manufacturing
- Overhead cranes, hoists, and monorail systems

CP Manufacturing



Overall, South County's location quotient<sup>36</sup> for advanced manufacturing is 1.04, which means it has roughly the same concentration of advanced manufacturing jobs when compared to the national average. Although South County does not currently enjoy a higher than average concentration of advanced manufacturing employment, the sector's high wages and South County's proximity to and relationships with advanced manufacturing facilities in Mexico make this an important sector to target for expansion.

The availability of affordable, industrially zoned land in the sub-region and the infrastructure and development projects under construction and being planned for the area offer the promise of recruiting new advanced manufacturing firms to South County. However, this promise can only be realized if a coordinated workforce training strategy equips South County's young and eager workforce with the specialized skills necessary to compete in advanced manufacturing.

Among South County residents surveyed as part of the Visioning Project, advanced manufacturing ranked fourth among eight industries as being one of the most important industries on which to focus business attraction and growth efforts. This may reflect a general lack of awareness of the industry, its potential for high-wage job creation, and its relationship to technological innovation. As South County works to promote the sub-region as a prime location for advanced manufacturing firms, internal marketing messages will need to be crafted to explain the importance of this industry to South County residents. This will be crucial for convincing South County's young people to invest the time and discipline required to learn the skills necessary to enter this high-paying industry.

The availability of affordable, industrially zoned land in the sub-region and the infrastructure and development projects under construction and being planned for the area offer the promise of recruiting new advanced manufacturing firms to South County

## Health

In the Visioning Survey, respondents ranked health as the top industry that South County should attract and grow.<sup>37</sup> This response likely reflects the heightened awareness of the industry in general, but also mirrors its importance to South County's economy. South County's health industry is comprised of over 950 establishments that collectively employ more than 17,000 people.<sup>38</sup> Since 2005, the industry has experienced a 23 percent increase in employment.<sup>39</sup>

The health industry provides stable jobs that offer employment opportunities for all skill levels and in firms that vary in size from small to very large.<sup>41</sup> While more than half of all South County health companies employ less than five workers, the sub-region also hosts various anchor institutions that support a strong network of emergency care services and employment opportunities, such as:

- Kaiser Permanente
- Paradise Valley Hospital
- Scripps Mercy Hospital Chula Vista
- Sharp Chula Vista Medical Center

South County enjoys a concentration of health jobs that is 35 percent higher than the rest of the country<sup>42</sup> and has a number of community clinics that operate in underserved communities.

In general, the health sector pays good wages. In San Diego, the average annual wages in health are \$61,825.<sup>43</sup>

As one of the strongest sectors in the region, the health industry remains an important area on which to focus coordinated economic and workforce development activity. Efforts aimed at articulating training and career pathways for South County residents that can lead from entry-level positions to credentialed and professional occupations can leverage the sub-region's existing assets to ensure quality jobs for current and future residents.

Scripps Mercy Hospital Chula Vista



## Food Processing and Distribution

The food processing and distribution industry is a strong employer in South County. The sub-region's robust level of activity is driven by more than 150 firms, consisting primarily of wholesalers, manufacturers, and bakeries.<sup>44</sup> Although South County lacks a headquarters of a major food processing and distribution firm, the local industry's small- and medium-sized businesses collectively provide approximately 2,500 jobs. This gives the sub-region a location quotient of 1.54 for jobs in the food processing and distribution industry – meaning it boasts a concentration of workers that is 54 percent greater than the national average for the industry.<sup>45</sup>

South County's producers include:<sup>46</sup>

- Retail bakeries
- Confectionery merchant wholesalers
- Fresh fruit and vegetable merchant wholesalers
- Grocery and related products merchant wholesalers
- Packaged frozen food merchant wholesalers
- Frozen specialty food manufacturing

South County's food processing and distribution industry is concentrated in Otay Mesa, where the average annual wage for the sector is \$40,357.<sup>47</sup>

The next stage for the development of this cluster is to attract a major headquarters facility, which can bring higher-paying professional and managerial occupations to the sub-region. South County is well-positioned to attract a company headquarters operation with ample space available for warehousing and food processing, close proximity to California's and Baja California's abundant agricultural regions, and a variety of business and industrial park facilities that are either vacant or in development.

The sub-region's robust level of activity is driven by more than 150 firms, consisting primarily of wholesalers, manufacturers, and bakeries



South County Food Processing Center

Tourism is one of South County's strongest sectors and was identified in the Visioning Survey as one of the most important industries on which to focus for job growth

## Tourism

Tourism is one of South County's strongest sectors and was identified in the Visioning Survey as one of the most important industries on which to focus for job growth. Approximately 150 employers make up South County's tourism industry, providing an estimated 5,400 jobs.<sup>48</sup> Compared to the portion of the national workforce participating in the tourism industry, South County has an employment location quotient of 2.09, meaning that the concentration of tourism sector jobs in South County is more than twice the national average.<sup>49</sup>

The businesses in South County's tourism cluster include:<sup>50</sup>

- Museums
- Hotels and motels
- Travel agencies
- Golf courses and country clubs
- Tour operators
- Water parks

The tourism sector offers some important opportunities for South County's economy and residents. First, the sector is primarily a service industry, which creates a large jobs base.<sup>52</sup> It also has very few barriers to entry, thereby creating entry-level opportunity for residents. Finally, tourism is an export industry that brings money into the region.<sup>53</sup>

However, the income for the industry's base workforce in San Diego County is noticeably lower than the County's overall average wage. In San Diego County, the average wage was approximately \$21,800 in the entertainment and hospitality industry, which is almost \$30,000 less than the average regional wage of \$50,700.<sup>54</sup> An economic development strategy around tourism should aim to create new market niches where up-skilled workers can earn family-supporting wages. One way to amplify the multiplier effect of proposed tourism-related projects is to explore opportunities to provide jobs with better wages, health benefits, and career ladders for South County residents.



The Sleep Train Amphitheatre



Another strategy to strengthen the tourism industry and create opportunities for local workers is to pursue the burgeoning eco-tourism industry. Existing assets such as the Chula Vista Marina, Pier 32, and the Sleep Train Amphitheatre, along with investment projects such as the transformation of the 535-acre Chula Vista Bayfront, the development of the 24-mile Bayshore Bikeway, and the promotion and restoration of the South San Diego Bay National Wildlife Refuge, highlight the marketability of South County as a premier eco-tourism destination.

South County can leverage recent and upcoming investments with its existing assets to foster more local opportunities for eco-tourism and create higher-skilled and higher-paying jobs. South County can turn to its community colleges to further enhance the region's competitiveness by designing training programs for higher-paying jobs in the hospitality and eco-tourism industry or spurring the creation of small businesses. The Living Coast Discovery Center and the Tijuana River National Estuarine Research Reserve are examples of existing assets, living laboratories, and potential training grounds for the next generation of naturalist/hospitality professionals. A cross-sector initiative between the tourism industry and the life sciences research sector could generate new opportunities to develop the skills and abilities of local workers to better support and promote eco-destinations that could attract more visitors and tourists to South County. Forging close linkages among these institutions can create a distinctive South County narrative that promotes economic activity while protecting and promoting the region's natural resources.

## Maritime Related Industries

Boat building and repair is a small but stable part of South County's economy, with 11 firms employing 478 people.<sup>55</sup> These firms boast an employment location quotient of 4.24, meaning the concentration of jobs in South County is more than four times greater than the national average.<sup>56</sup>

This cluster includes firms providing the following products and services:<sup>57</sup>

- Boat/ship building and repair
- Search, detection, navigation, guidance, aeronautical, and nautical system and instrument manufacturing
- Support activities for water transportation
- Port and harbor operations
- Navigational services to shipping
- Scenic and sightseeing transportation

Nationally, the boat building and repair industry pays a median annual salary of \$49,980.<sup>58</sup> In South County, the industry is characterized by medium-sized firms employing at least 10 people, with some companies employing more than 150 local workers.<sup>59</sup>

Although total employment for this sector is modest, the cluster links South County to San Diego's large and active maritime sector, which is expected to add 6,000 new jobs to the regional economy by 2020.<sup>60</sup> South County's waterfront, availability of large industrial sites, and proximity to maritime activity make it an excellent location for firms to launch and expand. Coupled with existing assets such as the Living Coast Discovery Center provides myriad opportunities to explore research and development in the maritime economy. These assets and opportunities position South County well to link-up with efforts to promote the maritime industry in San Diego<sup>61</sup> and maintain and grow the boat building and repair cluster.

National City Marine Terminal



Marine Group Boat Works





# PROJECT PIPELINE

## South County's Project Pipeline

South County emerged from the recession with a robust pipeline of private development and public infrastructure improvements that represent billions of dollars of collective investment. When considered in the context of South County's key industry clusters, the dozen leading projects described below can generate synergies that can expand the economic benefits of these investments for South County residents, workers, businesses, and investors for decades to come.

**1. Bayshore Bikeway:** The Bayshore Bikeway is a 24-mile bicycle facility around the San Diego Bay. Currently, about 15 miles of bicycle paths are in use on the car-free bikeway. The rest consists of on-street sections designated as either bicycle lanes or bicycle routes. The bikeway is part of SANDAG's Regional Bike Plan, which represents an overall vision for bicycling facilities that takes riders through some of the most scenic areas in San Diego County, as well as employment centers in and around the San Diego Bay. SANDAG is currently developing additional improvements to the bikeway based on the Bayshore Bikeway Plan, which was adopted in 2006 to identify opportunities to improve the bikeway along the east side of the Bay. The objective of the plan is to develop a continuous Class I bike path that would allow bicyclists to ride all the way around San Diego Bay on a dedicated path away from city streets. SANDAG is also developing additional improvements to the bikeway along the east side of the San Diego Bay and other portions of South County.<sup>62</sup>

Bayshore Bikeway



South County emerged from the recession with a robust pipeline of private development and public infrastructure improvements that represent billions of dollars of collective investment



Brown Field

**2. Brown Field:** Brown Field is an aviation airport located 1.5 miles north of the U.S.-Mexico border in Otay Mesa. In October 2013, the San Diego City Council approved a 20-year, 330-acre redevelopment. The \$990 million phased development includes additional airport infrastructure; installation of a 5 MW solar field; and aviation, commercial, industrial, and retail uses. Phase I of this project includes aviation facilities, hangars, and jet maintenance facilities; subsequent phases will include commercial industrial facilities, business hotels, and restaurants and retail uses. Construction is expected to begin in 2016 and slated for a 30-year completion. The project is designed to increase Brown Field's plane traffic capacity and visitor counts, which are expected to rise in coming years. It will stand as a tier aviation-based business park and will continue to serve as a relief airport for Lindbergh Field. The project is expected to provide 8,000 long-term jobs and 4,000 permanent jobs, as well as generate significant economic advantages for the region.



Chula Vista Bayfront

**3. Chula Vista Bayfront:** The Chula Vista Bayfront Master Plan (CVBMP) is a collaborative effort of the Port of San Diego, the City of Chula Vista, and Pacifica Companies to convert the bayfront into a landmark destination. The CVBMP was approved in 2012 and will be developed in 4 major phases over a 24-year period. The plan encompasses over 535 acres of underused industrial bayfront into a waterfront resort destination. The CVBMP is intended to produce thousands of new jobs, create new parks, protect natural coastal resources and sensitive wildlife habitat with extensive buffers, and offer visitor-serving retail and amenities. The CVBMP is expected to create more than 2,200 permanent jobs, nearly 7,000 construction jobs,<sup>63</sup> and numerous indirect jobs in the region.<sup>64</sup> Phase 1 of the CVBMP includes the development of hotels and a resort conference center, a new fire station, and a 1,500-unit mixed-use residential development. It will also feature 234 acres of public parks, open space, and habitat restoration/preservation areas, which amounts to more than 40 percent of the project area.



**4. Chula Vista University:** Plans for Chula Vista University's city-owned campus include a four-year university, a technology park, and a potential global energy research center. The City of Chula Vista (City) Councilmembers unanimously approved Land Offer Agreements in April 2008 with Otay Land Company for 210 acres (50 acres of university land and 160 acres of mitigation land) and in May 2008 with JPB Development for 160 acres, which upon successful implementation will provide sufficient acreage to develop the university. The total planned university site size is 375 acres and the total acreage value transferred to the City is approximately \$250-\$300 million. In return for the land, the City will allow developers to add more residential units to their existing plans and streamline the entitlement process. The next phase will be to intensively recruit a university. San Diego's regional economy benefits from its visionary investments in educational and research institutions and contains a diversified economy supported by advanced technology and innovation. Chula Vista University will further retain, strengthen, and grow this major traded economy by providing jobs, especially a broader spectrum of job opportunities that include manufacturing. The campus could also harness the power of innovation by incorporating life sciences, high-tech manufacturing, international trade, business management, and a research institution.<sup>65</sup>

**5. Cross Border Express:** In June 2014, the Otay-Tijuana Venture LLC began constructing Cross Border Express, which will connect a terminal in Otay Mesa to the Tijuana Airport. The terminal is designed to allow passengers to park in the U.S., check their baggage at a proposed 65,000 square foot customs station, walk over a 325-foot pedestrian bridge across the U.S.-Mexico border, and board a plane at the Tijuana Airport. Only ticketed passengers who pay a fee will be allowed to cross the bridge in either direction. Through restricted use and corresponding tolls, developers expect to virtually eliminate the long border wait times currently endured by travelers. Additionally, the terminal is expected to alleviate traffic at existing ports of entry and offer San Diego more direct flight options, especially internationally. The terminal will also contain restaurants and other retail amenities for travelers. The project is slated to be operational by the end of summer 2015.

**6. Highland Avenue/8<sup>th</sup> St. Community Corridor:** Traffic safety enhancements are planned for Highland Avenue between Division Street and E. 8th Street as part of National City's Capital Improvement Program. Street design standards will be established to improve traffic and pedestrian safety by:<sup>66</sup>

- reducing travel lanes to two lanes with protected left-turn pockets at intersections;
- providing ADA improvements, enhanced signing and striping, corner bulb-outs and refuge islands to calm traffic and reduce pedestrian crossing distances;
- constructing landscaped islands to calm traffic and beautify the corridor; and
- converting parallel parking to angle parking to provide more parking and improve access to local businesses.

These streetscape improvements are slated for completion by January 2015.<sup>67</sup>

**7. HomeFed Corporation Project :** HomeFed Corporation has recently obtained entitlement approval for its Village 8-West and Village 9 projects in Otay Ranch. The Village 8-West development will include a town center with 250,000 square feet of retail and 50,000 square feet of office along with 2,050 dwelling units (DU's). Construction is anticipated to begin in late 2014. Earlier in 2014, HomeFed received entitlement approval for Village 9 which, when completed, can accommodate up to 1.2 million square feet of office space, 300,000 square feet of retail, and an additional 4,000 DU's.

**8. JPB:** JPB intends to develop several projects based on entitlements obtained for the Otay Ranch area of eastern Chula Vista. In 1993, the City of Chula Vista and the San Diego County Board of Supervisors jointly adopted the Otay Ranch General Development Plan, consisting of 9 urban villages containing approximately 27,000 dwelling units as well as commercial and community facilities.<sup>68</sup> Otay Ranch is planned as a balanced community that will include housing, retail, workplaces, schools, civic facilities, parks and open space. It will be the focal point of most of Chula Vista's growth in the near and mid-term. In Village 2, JPB is developing approximately 98 single-family and 96 multi-family units by the end of 2015. In Village 3 North, JPB is currently in the entitlement process to develop a total of 255 units in 2015, and several hundred more units in subsequent years.<sup>69</sup>

Rendering of Highland Ave./8<sup>th</sup> Street



Otay Ranch is planned as a **balanced community** that will include housing, retail, workplaces, schools, civic facilities, parks and open space

**9. Millenia:** The Millenia project is anticipated to be the epicenter of the award-winning, 23,000-acre Otay Ranch community. Millenia is a \$4 billion, 210-acre mixed-use, energy-efficient, pedestrian-oriented, well-planned community. A hybrid of suburban and urban neighborhoods, Millenia will include more than 3.5 million square feet of commercial space (office, civic, and retail) that is expected to create approximately 10,000 jobs. The project's 3,000 condominiums, townhomes, and lofts will also include affordable, senior, and assisted living units.<sup>70</sup> Millenia will develop housing types in a series of compact, walkable districts that will include employment and civic uses. The entire community is woven together with parks, plazas, town squares, and biking and walking paths that offer recreation and relaxation opportunities. Millenia is conveniently located near public transit and is adjacent to State Route 125 and a planned express transit route. Millenia will link downtown San Diego with the international border, making it as much of a regional center as a neighborhood. An innovative new regional high-speed express bus service will provide transportation to and from downtown San Diego in 25 minutes and to the border crossing at San Ysidro in 10 minutes. The local bus service will also provide public transportation to the historic Third Avenue District of Chula Vista, the Chula Vista Nature Center, and the Chula Vista Bayfront.

**10. Otay II – SR-11:** State Route 11 (SR-11) and a new port of entry (POE) at East Otay Mesa (Otay II) will improve the movement of people, goods, and services between the United States and Mexico. Scheduled to open in 2017, the new POE and a three-mile, four-lane state highway will connect the U.S.-Mexico border to key regional, state, and international highways. In the U.S., SR-11 will connect to State Routes 905 and 125. In Mexico, the corridor will connect the new POE to the Tijuana-Tecate and Tijuana-Ensenada free and toll roads.<sup>71</sup> The new POE at East Otay Mesa will help reduce traffic at the existing San Ysidro and Otay Mesa Ports of Entry. The border crossing will also provide an alternate entry for commercial traffic that is currently limited to the Otay Mesa POE. SR-11 will help reduce congestion on surface streets and will provide an important link to the region's freeway network, while a commercial vehicle enforcement facility accessed via a toll road will provide shorter and more predictable crossing times.<sup>72</sup> The new POE will be open 24 hours a day, 7 days a week, and include 10 pedestrian vehicle lanes and 10 commercial vehicle lanes. Wait times are expected to decrease to approximately 20 minutes. Tolls at the new POE will be collected in both the northbound and southbound directions.



Pond 20 -- undeveloped land between Palm Avenue and the San Diego National Wildlife Refuge

Pond 20 is currently undeveloped and the Port of San Diego is working with the cities of San Diego and Imperial Beach and Caltrans to explore opportunities for future uses

**11. Pond 20:** Pond 20, originally one of the salt ponds of the Western Salt Company, is a 95.13-acre parcel of land that includes developable land. It is located between Palm Avenue and the San Diego National Wildlife Refuge in south San Diego Bay. The San Diego Unified Port District has owned the property since 1998. Pond 20 lies within the city limits of San Diego and was previously part of the redevelopment area of Imperial Beach. It is on Palm Avenue, which is considered by many to be the gateway to South County beaches. Pond 20 is currently undeveloped and the Port of San Diego (Port) is working with the cities of San Diego and Imperial Beach along with Caltrans to explore opportunities for future uses. These entities have established a Memorandum of Understanding to outline a process for soliciting input and developing project proposals to determine the property's highest and best use. In 2012, the Port entered into a long-term development process, which included two rounds of public outreach, presentations to community groups to discuss the process and encourage stakeholder participation, development workshops, and the receipt of letters of interest.<sup>73</sup> Through this process the Port received hundreds of comments that will guide the project design.

**12. San Ysidro POE:** The San Ysidro Port of Entry (POE) is the busiest land border crossing in the Western Hemisphere. It processes approximately 50,000 northbound vehicles and 25,000 northbound pedestrians per day,<sup>74</sup> resulting in 102,000 people crossing the border daily.<sup>75</sup> The San Ysidro POE currently has 6 southbound lanes and 24 northbound lanes. Current wait times average two hours.<sup>76</sup> A recent SANDAG study estimates an 87 percent increase in vehicular traffic in San Ysidro by the year 2030.<sup>77</sup> To accommodate this growth, the San Ysidro POE project is being expanded to 34 northbound lanes and 19 southbound lanes.<sup>78</sup>

The \$732 million project will also expand pedestrian processing facilities, including a pedestrian path and 38 additional vehicle inspection stations (62 overall).<sup>79</sup> Through these improvements, the project intends to lower current border wait times from 2 hours to 30 minutes. The project is divided into three phases, with all three targeted to achieve LEED Platinum certification. Phase I (completed in September 2014), includes a pedestrian bridge, northbound vehicular inspection facilities, and a southbound pedestrian crossing. Phases II (unfunded) and III (fully funded) will include the construction of the 200,000-square foot administration and pedestrian building and I-5 South and Southbound inspection facilities.<sup>80</sup>

Rendering of the proposed San Ysidro Port of Entry



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## **Synergies**

In the near term, South County can truly be the right place at the right time with the right people to seize the opportunities in a post-recession globalized economy. South County's abundance of available land for job-generating uses provides businesses of all sizes a vast inventory of new, varied, and competitively-priced space to grow. Existing industry clusters offer stable employment and the promise of further expansion if South County's business and civic culture can knit together strong local and cross-border supply chains.

The billions of dollars of private development and public improvements planned over the next five to ten years signal an era of strong growth that can be leveraged to benefit a young, diverse, and multilingual population eager to work closer to home.

South County must harness and coordinate its efforts to secure the additional improvements in the land port, airport, and transit infrastructure it needs to fully realize the region's potential to be a hub for well-paying growth industries. It needs to highlight its human capital, infrastructure, and quality of life assets to attract regional headquarters for well-established companies. In addition, these assets can be strong attractors for new production facilities for firms that are scaling up in emerging sectors. Above all, it must align its investments in the education and training of its people to meet the needs of high-paying, high-growth industries that constantly innovate to stay ahead. These industries depend on a flexible, nimble, up-skilling workforce. In the Visioning Survey, the concept of investing in people resonated strongly with South County residents as the most important strategy for building an economically prosperous community.

The surveys, expert interviews, stakeholder workshops, and presentations conducted during the Visioning Project elicited valuable insights into the synergies created by South County's existing assets, project pipeline, and current and emerging industry clusters. The synergies described offer a roadmap for stakeholders and policymakers on how to leverage and link the region's many near term investments.

**South County can truly be the right place at the right time with the right people to seize the opportunities in a post-recession globalized economy**

### **Air Traffic and Career Pathways Take-Off Together**

The \$900 million redevelopment of Brown Field in Otay Mesa presents an opportunity to target demand-driven career technical training from the ground-up. Over the next 20 years, 4 phases of aviation facilities, hangars, business services, and commercial and retail uses are slated for development on the site. Just minutes from Brown Field, Southwestern College stands as a ready and eager partner to meet the training needs of the aviation industry. As the vertical development on Brown Field moves forward, a partnership with Southwestern College can be forged to link local residents to training for careers such as aircraft service technicians. The airport hangars can be used as valuable on-the-job learning centers for students seeking certifications.

A customized Brown Field training curriculum can be integrated into an overall sector-specific workforce development training program tailored to meet the broader needs of South County's aerospace industry. With South County's aerospace cluster concentrated in nine firms, the opportunity to establish close ties to the industry, assess its training needs, and provide demand-driven training is exceptional. In addition, the career and technical education provided at the community college level can be augmented by the development of degree programs at the future Chula Vista four-year university. Degree programs in engineering, industrial product design, and business management can recruit and educate a pipeline of talented South County professionals who can further grow the sub-region's aerospace cluster.

Brown Field

The \$900 million redevelopment of **Brown Field** in Otay Mesa presents an **opportunity** to target demand-driven career **technical training** from the ground-up



## Urban Village Spawns Regional HQs: Landing a Major Advanced Manufacturer

The \$4 billion, 210-acre mixed-use Millenia project, Cross Border Express, the Otay II-SR-11 project, and the proposed Chula Vista University, together represent powerful reinforcing investments that can position South County as a prime location for an advanced manufacturing regional headquarters. Enhanced cross-border connections by air, truck, and automobile will ease the bi-national flow of ideas, workers, and commerce for a business seeking real-time innovation in design and production.

The firm can enjoy state-of-the-art office space in Millenia while its engineers, designers, and other professionals enjoy the best of Chula Vista's lifestyle centers in a vibrant and contemporary urban setting. Campus industrial, business parks, and large warehousing and distribution space in Otay Mesa and East Otay Mesa are available in close proximity to office operations, facilitating production and shipping efficiencies. In addition, the location of design and production facilities will reduce the time and expense of adjusting specs and manufacturing processes to respond to customers.

Development of a four-year university in Chula Vista that can offer degree programs in engineering, industrial product design, international trade, and business management is icing on the cake. It can reassure major firms that South County can supply the talent needed to meet their operational and managerial needs. Attracting new talent will be made even easier by the variety and relative affordability of diverse housing product types throughout Otay Ranch and other South County communities.

The synergies created among these major projects should be harnessed through an intensive marketing effort aimed at landing an advanced manufacturing regional headquarters. This effort would encompass focused targeting of companies, development of marketing collateral, maintenance of a list of available or soon to be developed office and industrial spaces, and "Fam Trips" to familiarize business executives with the locational, infrastructure, educational, and quality of life assets of South County. Recruitment of a four-year university should emphasize South County's potential to be a center for applied research in materials, information, sensing, automation, and other technology that shapes advanced manufacturing. With a campus adjacent to an urban lifestyle center, and easy access to the region's recreational amenities, the university can be the center of South County's emerging creative class.

Rendering of Millenia





### **Cross-Border Commerce and the Rise of the Global Executive MBA**

South County is a crossroads for international commerce. By reducing border-wait times and enhancing air travel options, the San Ysidro Point of Entry improvements, Otay II—SR-11, and the Cross Border Express will expand opportunities for firms with bi-national supply chains, strong import and export relationships, and product sharing arrangements. The development of a four-year university in Chula Vista presents another synergy with these projects. The university's proximity to the flow of international commerce positions it well to develop an executive-level MBA program in partnership with a Mexico-based university. A Global Executive MBA program could use the South County region as a living laboratory for the study of operations, market strategy, data analysis, and management decisions that drive the global economy.

A Global Executive MBA program could help the new university establish its identity, expose senior executives from around the world to the business opportunities and quality of life advantages presented by the region, and grow the pool of talent available to firms being recruited to locate their operations and headquarters in South County.

## **From the Mesa to the Sea – Opportunities in the Blue Economy**

San Diego has a large and active maritime sector, with approximately 6,000 new jobs being added to the regional economy by 2020. South County can position itself to capture a major portion of these jobs by utilizing its waterfront, availability of land and large industrial sites, and proximity to related maritime economic activity to launch and expand its participation in the blue economy.

Opportunities in the blue economy are not limited to the waterfront but can be brought inland as well, providing economic benefits across the sub-region. The new transit linkages between the Chula Vista Bayfront and the eastern part of South County make it possible to partner with Southwestern College, the future Chula Vista University, and assets such as the Living Coast Discovery Center and Tijuana River Estuary to provide training, internships, and educational opportunities in maritime activities, marine biology, climate change adaptation, wastewater management, and coastal resource conservation for local residents.

Along with these potential training and educational offerings, South County also has the available land to build an inland maritime sector training center/incubator. The region could utilize vacant space in an existing business park or incorporate the facility in the 3.5 million square feet of commercial space within the Millenia development project. The Millenia site is an especially viable option; along with abundant commercial space, Millenia will also offer access to an express bus rapid transit route that will link downtown San Diego with the international border crossing, as well as local bus service to assets such as the Chula Vista Bayfront and the Chula Vista Nature Center. This provides the perfect opportunity to link recreational and natural assets with educational programming and a training center/incubator. Millenia is also situated adjacent to the future Chula Vista University, which could house a research center, offer degree and training programs, and provide teaching opportunities for faculty and students alike at the training center/incubator.

### **Eco-Tourism and the Hospitality Industry**

Tourism is one of South County's strongest industries and one of the top three leading areas for investment identified in the Visioning Survey. With the development of the 535-acre Chula Vista Bayfront into a residential and resort destination, the extension of the iconic 24-mile Bayshore Bikeway, and assets such as the South San Diego Bay National Wildlife Refuge, South County has an opportunity to market the sub-region as an eco-tourism destination. Eco-tourism provides an opportunity not only to promote conservation and the enhancement of bio-cultural diversity and awareness, but also to empower local communities to obtain direct social, cultural, and economic benefits for such conservation efforts.

South County can expand upon its existing strengths and assets while leveraging its new infrastructure investments to delve deeper into fostering local opportunities for eco-tourism and the environmentally-focused jobs it can create. Natural assets such as the Living Coast Discovery Center and the Tijuana River Estuary are not solely eco-tourism destinations, but are living laboratory and training grounds for the next generation of naturalist/hospitality professionals. As such, South County can take advantage of its community colleges to further enhance the sub-region's competitiveness by designing training programs for higher-paying jobs in the eco-tourism and hospitality industry. Curricula could revolve around eco-tourism research, hospitality, travel ambassadorship, public relations/marketing/social media communications, business development/fundraising, and event planning and management. Forging close linkages among these myriad institutions can benefit all sides by creating a distinctive South County narrative that promotes economic and cultural activities while providing environmental education opportunities to empower its local residents and communities.

South County is also primed to promote and expand this nascent industry by leveraging its new infrastructure investments. The extension of the Bayshore Bikeway will enhance access to San Diego Bay and allow cyclists to experience all of the public assets on the Chula Vista waterfront. The San Diego region is leading the way and is expected to be the first of 15 coastal California counties to complete work on their portion of the California Coastal Trail, a continuous bicycle thoroughfare stretching from the Oregon border to Border Field State Park in San Ysidro.<sup>82</sup> The redevelopment of the Chula Vista Bayfront into a waterfront resort destination with new parks, protected natural coastal resources and sensitive wildlife habitat, and visitor-serving retail and amenities will create thousands of new jobs and public revenues for the region. This presents an opportunity to not only promote another eco-tourism destination, but to catalyze eco-tourism jobs and entrepreneurship and training opportunities for local residents. By linking South County's various natural assets, the sub-region can protect those assets while providing economic benefits and empowerment for its communities and residents.

The Bayshore Bikeway



South County can expand upon its existing strengths and assets while leveraging its new infrastructure investments to delve deeper into fostering local opportunities for eco-tourism and the environmentally-focused, accessible jobs that it can create



# Action Plan

## **Action Plan**

South County is a place where great ideas have room to grow. This Work Plan identifies strategies that will enable the SCEDC to create, build upon, and link economic development projects and opportunities in the area. South County's location, population, land availability and affordability, and economic environment present exciting opportunities for the sub-region to maximize the impact of future investments. The SCEDC is committed to working with partners to maximize the advantages of ongoing development projects, promote the next generation of innovators, build on existing and emerging industry clusters, expand international trade and commerce, and bolster the tourism industry.

The SCEDC is committed to working with partners to maximize the advantages of ongoing development projects, promote the next generation of innovators, build on existing and emerging industry clusters, expand international trade and commerce, and bolster the tourism industry

## **Strategy #1: Promote the Innovation Economy**

South County is brimming with all of the ingredients it takes to foster a vibrant innovation economy. South County's available commercial and industrial space, healthy industry clusters, skilled and youthful workforce, and commitment to expand educational and training opportunities offers fertile ground for start-ups to grow and provides an environment for spin-offs to emerge from established businesses. In addition, the sub-region's makers movement of designers, artists, creators, and tinkerers provides ample demand for places and spaces to prototype and market new products. This strategy invests in the skills, training, and education of South County's people as its core approach, reflecting the strong sentiment expressed in the Visioning Survey that this is the most important way to build an economically prosperous community. This strategy is aimed at building and showcasing South County's competitive workforce of makers, entrepreneurs, innovators, and thought leaders in existing and emerging sectors.

- Action Step #1**      Promote the creation of incubators and accelerators
- Action Step #2**      Develop technical training programs at community colleges to meet the specialized needs of the aerospace and aviation industry
- Action Step #3**      Market advanced manufacturing as a skilled and high paying career pathway to local high school and community college students
- Action Step #4**      Explore the establishment of a polytechnic academy to train young people for careers in advanced manufacturing
- Action Step #5**      Develop degree programs at the Chula Vista four-year university in fields related to advanced manufacturing
- Action Step #6**      Promote South County as a center for Blue Economy jobs
- Action Step #7**      Develop training, internships and linked-learning programs in Blue Economy fields



## **Strategy #2: Build on Industry Clusters**

South County's key industry clusters of aerospace, advanced manufacturing, health, food processing and distribution, and boat building and repair are a good starting point for promoting stable, well-paying jobs in the sub-region. This strategy focuses on retaining, and expanding these existing clusters to capture more companies and higher-paying jobs for South County. Visioning Survey participants ranked this as the second most important strategy for building a prosperous South County. Developing marketing messages tailored to each industry will be crucial to successfully executing this strategy.

- Action Step #1**      Develop a small manufacturers' assistance and attraction program
- Action Step #2**      Create, maintain and publicize a list of available office and industrial space for large aerospace, advanced manufacturing, food processing and distribution firms
- Action Step #3**      Develop a global "Fam Trip" tour program to familiarize targeted firms with South County assets and economic opportunities
- Action Step #4**      Promote local and bi-national supply chains in aerospace and advanced manufacturing
- Action Step #5**      Articulate training and career pathways for South County residents to progress from entry level to credentialed to professional employment in the healthcare sector
- Action Step #6**      Recruit the headquarters of a major food processing and distribution company
- Action Step #7**      Recruit advanced manufacturing headquarters and production facilities

### **Strategy #3: Expand International Trade and Commerce**

Over the next five years, South County has the opportunity to showcase its assets and strengths to expand its international trade and commerce efforts. With its proximity to the border, abundance of available land for new manufacturing and commercial facilities, young and up-skilling workforce, and new investments in infrastructure, the sub-region is well-positioned to promote itself as the premiere North American target for foreign direct investment and cross-border commerce.

South County is the nexus to a rich cross-border cluster of innovation, technology, and manufacturing. As global labor, manufacturing, and transportation costs are rising, companies are considering on-shoring and near-shoring their operations to North America. In addition, overall manufacturing costs in Mexico and the U.S. are improving relative to nearly all other leading global exporters. By establishing the sub-region as a gateway where cross-border businesses connect, South County can leverage its diverse and multilingual business and civic culture to create greater momentum for improving the airport, sea port, and cross-border infrastructure necessary to promote international investment in South County's growing industry clusters. The following strategic efforts can position South County as the prime locale to expand international trade and cross-border commerce.

- Action Step #1**      Promote South County as a target for foreign direct investment and cross-border commerce
- Action Step #2**      Explore creation of a border business conference center
- Action Step #3**      Develop a global executive MBA program at the four-year Chula Vista university in partnership with a major Mexican university

Otay Mesa Port of Entry

South County is the **nexus** to a rich cross-border cluster of **innovation, technology, and manufacturing**



## **Strategy #4: Grow Our Tourism Industry**

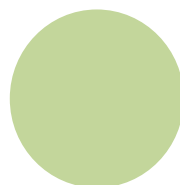
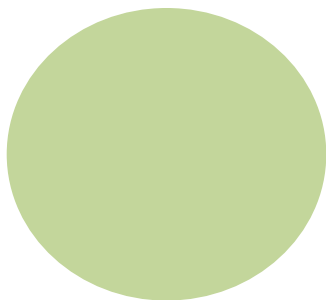
Tourism is already one of South County’s strongest sectors and is considered one of the top industries for continued investment by residents and stakeholders.<sup>84</sup> In order to expand this established industry, South County needs to branch out into a new subsector to see continued tourism growth and investment. Numerous new projects, along with existing natural assets, highlight the marketability of South County as an eco-tourism destination.

Notable new projects that will amplify the South County’s emerging eco-tourism industry include the redevelopment of the Chula Vista Bayfront, the extension of the Bayshore Bikeway, and the development of Pond 20 to its best and highest use, along with the various transit and infrastructure investments in the sub-region’s development pipeline. These new projects and infrastructure investments can be leveraged with South County’s existing natural assets – including the Living Coast Discovery Center, Paradise Creek Educational Park, San Diego National Wildlife Refuge, and the Tijuana River Estuary – to foster investment and growth opportunities for the eco-tourism industry. This promotion and investment can then be used to create well-paying, environmentally-focused jobs for South County’s residents, while conserving and protecting its natural environment. Through a cross-sector approach between tourism and the natural sciences, these new projects and corresponding jobs will position the sub-region as a prime eco-tourism destination that will attract a new and expanding segment of visitors to South County.

The following strategic efforts can help South County grow its eco-tourism industry.

- Action Step #1**      Implement an eco-tourism marketing campaign
- Action Step #2**      Promote eco-tourism
- Action Step #3**      Design training programs for higher-paying jobs in the eco-tourism and hospitality industry

Living Coast Discovery Center



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### **Five Year Work Plan: Strategies, Action Steps, Tasks and Timeframe**

Over the next five years, the SCEDC will leverage South County’s competitive assets and take advantage of potential synergies to spur economic growth across the region. The SCEDC will work to encourage growth in emerging innovative industries to attract businesses, investments, and a talented workforce to locate in South County. The tables on the following pages summarize the strategies, action steps, tasks, and timeframes for implementation that the SCEDC and its partners will pursue to support and promote economic development in South County.

# 6

## Strategy 1: Promote the Innovation Economy

<b>Action Step 1: Promote the creation of incubators and accelerators</b>		
<b>TASKS</b>	<b>KEY PARTNER ORGANIZATION(S)</b>	<b>TARGET DATE(S)</b>
Survey and develop a list of existing co-working spaces, incubators, and accelerators	<ul style="list-style-type: none"> <li>• Site location consultants</li> <li>• Real estate brokers</li> <li>• Chambers of commerce</li> <li>• South County local governments</li> <li>• Property owners</li> <li>• Real estate developers</li> <li>• Trade organizations</li> </ul>	Q4 2014
Develop a crowd-sourced website to promote existing sites and track new potential sites	<ul style="list-style-type: none"> <li>• Site location consultant</li> <li>• Real estate brokers</li> <li>• Regional chambers of commerce</li> <li>• South County local governments</li> <li>• Property owners</li> <li>• Developers</li> </ul>	Q1-Q3 2015
Evaluate the need for additional space, if necessary	<ul style="list-style-type: none"> <li>• Site location consultants</li> <li>• Real estate brokers</li> <li>• Regional chambers of commerce</li> <li>• South County local governments</li> <li>• Property owners</li> <li>• Real estate developers</li> <li>• Trade organizations</li> </ul>	Q3-Q4 2015
Seek fiscal sponsorship or co-location opportunities for new space in existing or planned developments	<ul style="list-style-type: none"> <li>• Utilities</li> <li>• Financial institutions</li> <li>• Colleges</li> <li>• Port of San Diego</li> </ul>	Q1-Q4 2016

# Strategy 1: Promote the Innovation Economy



<b>Action Step 2: Develop specialized technical training programs at community colleges to meet the needs of the aerospace industry</b>		
<b>TASKS</b>	<b>KEY PARTNER ORGANIZATION(S)</b>	<b>TARGET DATE(S)</b>
Research areas of potential aerospace workforce growth	<ul style="list-style-type: none"> <li>San Diego Workforce Partnership</li> <li>Aerospace firms</li> </ul>	Q1-Q2 2015
Determine skills and abilities required for projected aerospace jobs	<ul style="list-style-type: none"> <li>San Diego Workforce Partnership</li> <li>Aerospace firms</li> <li>Regional colleges</li> </ul>	Q3-Q4 2015
Develop partnerships with aerospace employers such as UTC Aerospace Systems	<ul style="list-style-type: none"> <li>San Diego Workforce Partnership</li> <li>Aerospace firms</li> </ul>	2016- 2018
Develop a customized training program at Brown Field for aviation careers (e.g., aircraft service technicians)	<ul style="list-style-type: none"> <li>Southwestern College</li> <li>San Diego Workforce Partnership</li> <li>City of San Diego</li> <li>Operator of Brown Field</li> </ul>	2016- 2018
Develop degree programs in engineering, industrial product design, and business management for the future four-year university	<ul style="list-style-type: none"> <li>Four-year university</li> <li>Aerospace firms</li> </ul>	2016- 2018

<b>Action Step 3: Market advanced manufacturing as a skilled and high paying career pathway to local high school and community college students</b>		
<b>TASKS</b>	<b>KEY PARTNER ORGANIZATION(S)</b>	<b>TARGET DATE(S)</b>
Partner with local high schools and colleges to promote advanced manufacturing as a viable and attractive career path for local students	<ul style="list-style-type: none"> <li>Regional high schools</li> <li>Regional colleges</li> </ul>	2016
Partner with the local WIB to develop an advanced manufacturing jobs pipeline for future employees to enter the workforce	<ul style="list-style-type: none"> <li>San Diego Workforce Partnership</li> </ul>	2016- 2018

## Strategy 1: Promote the Innovation Economy

### Action Step 4: Explore the establishment of a polytechnic academy to train young people for careers in advanced manufacturing

TASKS	KEY PARTNER ORGANIZATION(S)	TARGET DATE(S)
Explore applicability of polytechnic academy model to South County schools	<ul style="list-style-type: none"> <li>Advanced manufacturing firms</li> <li>San Diego Workforce Partnership</li> <li>San Diego Unified School District</li> <li>Public Schools</li> <li>Sweetwater Union High School District</li> </ul>	2017-2018

### Action Step 5: Develop degree programs at the Chula Vista four-year university in fields related to advanced manufacturing

TASKS	KEY PARTNER ORGANIZATION(S)	TARGET DATE(S)
Develop degree programs in engineering, design, and technology and business management for the future four-year university	<ul style="list-style-type: none"> <li>Four-year university</li> <li>Advanced manufacturing firms</li> </ul>	2017-2018

### Action Item 6: Promote South County as a center for new and expanding Blue Economy firms

TASKS	KEY PARTNER ORGANIZATION(S)	TARGET DATE(S)
Create a maritime sector training center/incubator	<ul style="list-style-type: none"> <li>Existing business parks</li> <li>South County local governments</li> <li>Blue Economy firms</li> <li>Local community colleges</li> <li>Four-year university</li> </ul>	2017-2018

### Action Item 7: Develop training, internships and linked-learning programs in Blue Economy fields

TASKS	KEY PARTNER ORGANIZATION(S)	TARGET DATE(S)
Create educational and training opportunities in Blue Economy fields, such as marine biology, climate change adaptation, wastewater management, and coastal resource conservation for local residents	<ul style="list-style-type: none"> <li>Four-year university</li> <li>Southwestern College</li> <li>San Diego Workforce Partnership</li> <li>Blue Economy firms</li> <li>Living Coast Discovery Center</li> <li>Tijuana River National Estuarine Research Reserve</li> </ul>	2017-2018



## Strategy 2: Build on Industry Clusters

<b>Action Step 1: Develop an assistance and attraction program for small manufacturers</b>		
<b>TASKS</b>	<b>KEY PARTNER ORGANIZATION(S)</b>	<b>TARGET DATE(S)</b>
Research and survey existing programs and best practices nationally	<ul style="list-style-type: none"> <li>• Real estate brokers</li> <li>• SDREDC</li> <li>• Manufacturing trade organizations</li> </ul>	2016
Interview small manufacturers to assess site and programing needs	<ul style="list-style-type: none"> <li>• Site location consultants</li> <li>• South County local governments</li> </ul>	2016
Convene key partners to develop a target list of small manufacturers	<ul style="list-style-type: none"> <li>• Regional chambers of commerce</li> <li>• Real estate brokers</li> <li>• Developers</li> </ul>	2016
Connect growing companies to permanent sites for manufacturing and production	<ul style="list-style-type: none"> <li>• Site consultants</li> <li>• Financial institutions</li> <li>• Real estate brokers</li> <li>• South County local governments</li> </ul>	2016-2018

<b>Action Step 2: Create, maintain and publicize a list of available office and industrial space for large aerospace, advanced manufacturing, food processing and distribution firms</b>		
<b>TASKS</b>	<b>KEY PARTNER ORGANIZATION(S)</b>	<b>TARGET DATE(S)</b>
Convene key partners to develop target list of firms	<ul style="list-style-type: none"> <li>• South County local governments</li> <li>• Regional chambers of commerce</li> <li>• Real estate brokers</li> <li>• Existing industry firms</li> </ul>	Q1 2015
Consult with target firms on space requirements	<ul style="list-style-type: none"> <li>• Target firms</li> </ul>	Q2 2015
Engage site location specialists to profile space and facility needs	<ul style="list-style-type: none"> <li>• Site consultants</li> <li>• Real estate brokers</li> </ul>	Q2 2015
Confer with South County brokers to compile target opportunity sites and marketing strategies based on site/space needs of target firms	<ul style="list-style-type: none"> <li>• Real estate brokers</li> </ul>	Q3-Q4 2015
Confer with South County city planning and building departments regarding entitlement and permitting issues for target firms	<ul style="list-style-type: none"> <li>• South County local government</li> <li>• City planning</li> <li>• Building departments</li> <li>• Developers</li> </ul>	2015-2016
Develop and update marketing materials and opportunity site profiles	<ul style="list-style-type: none"> <li>• South County local governments</li> <li>• Regional chambers of commerce</li> <li>• Real estate brokers</li> </ul>	Q4 2015-2018

## Strategy 2: Build on Industry Clusters

### Action Step 3: Develop a global "Fam Trip" tour program to familiarize targeted firms with South County assets and economic opportunities

TASKS	KEY PARTNER ORGANIZATION(S)	TARGET DATE(S)
Survey best practices and tactics for "Fam Trip" programs	<ul style="list-style-type: none"> <li>Regional chambers of commerce</li> <li>South County local governments</li> </ul>	Q1 2015
Convene key partners to develop a target list of corporations and firms	<ul style="list-style-type: none"> <li>Regional chambers of commerce</li> <li>South County local governments</li> </ul>	Q1 2015
Identify participating sponsors and develop and initiate a "Fam Trip" itinerary	<ul style="list-style-type: none"> <li>Regional chambers of commerce</li> <li>South County local governments</li> </ul>	Q2 2015
Conduct "Fam Trips"	<ul style="list-style-type: none"> <li>Regional chambers of commerce</li> </ul>	Quarterly starting Q3 2015

### Action Step 4: Promote local and bi-national supply chains in aerospace and advanced manufacturing

TASKS	KEY PARTNER ORGANIZATION(S)	TARGET DATE(S)
Identify resources and partners to support deep bi-national supply chains research	<ul style="list-style-type: none"> <li>Maritime Alliance</li> <li>Port of San Diego</li> <li>Tijuana EDC</li> <li>SDREDC</li> </ul>	Q3-Q4 2015
Commission bi-national supply chains report	<ul style="list-style-type: none"> <li>Maritime Alliance</li> <li>Port of San Diego</li> <li>Tijuana EDC</li> <li>SDREDC</li> </ul>	2016
Implement bi-national supply chains strategy	<ul style="list-style-type: none"> <li>Maritime Alliance</li> <li>Port of San Diego</li> <li>Tijuana EDC</li> <li>SDREDC</li> </ul>	2016- 2018

### Action Step 5: Articulate training and career pathways for South County residents to progress from entry level to credentialed to professional employment in the healthcare sector

TASKS	KEY PARTNER ORGANIZATION(S)	TARGET DATE(S)
Research areas of potential healthcare workforce growth	<ul style="list-style-type: none"> <li>San Diego Workforce Partnership</li> <li>Healthcare firms</li> </ul>	Q3-Q4 2015
Determine skills and abilities required for projected healthcare jobs	<ul style="list-style-type: none"> <li>San Diego Workforce Partnership</li> <li>Healthcare firms</li> <li>Community and other regional colleges</li> </ul>	2016
Develop curricula and training programs based on forecasts and needs	<ul style="list-style-type: none"> <li>Community and other regional colleges</li> <li>Healthcare firms</li> </ul>	2017- 2018

## Strategy 2: Build on Industry Clusters



### Action Step 6: Recruit the headquarters of a major food processing and distribution company

TASKS	KEY PARTNER ORGANIZATION(S)	TARGET DATE(S)
Convene key partners to develop a target list of corporations and firms	<ul style="list-style-type: none"> <li>• South County local governments</li> <li>• Regional chambers of commerce</li> <li>• Real estate brokers</li> </ul>	2016
Collect supporting data and develop collateral material for a marketing campaign	<ul style="list-style-type: none"> <li>• Regional chambers of commerce</li> <li>• Real estate brokers</li> <li>• South County local governments</li> </ul>	2016
Conduct "Fam Trips" for target firms	<ul style="list-style-type: none"> <li>• South County local governments</li> <li>• Regional chambers of commerce</li> </ul>	2017-2018

### Action Step 7: Recruit the headquarters of advanced manufacturing and production facilities

TASKS	KEY PARTNER ORGANIZATION(S)	TARGET DATE(S)
Convene key partners to develop a target list of advanced manufacturing firms	<ul style="list-style-type: none"> <li>• South County local governments</li> <li>• Regional chambers of commerce</li> <li>• Real estate brokers</li> </ul>	Q1 2015
Consult with target firms on space requirements	<ul style="list-style-type: none"> <li>• Target firms</li> </ul>	Q2 2015
Engage site location specialists to profile space and facility needs	<ul style="list-style-type: none"> <li>• Site Consultants</li> <li>• Real estate brokers</li> <li>• Millenia project owners</li> </ul>	Q2 2015
Confer with South County brokers to compile target opportunity sites and marketing strategies based on site/space needs of target firms	<ul style="list-style-type: none"> <li>• Real estate brokers</li> </ul>	Q3-Q4 2015
Collect supporting data and develop collateral material for marketing campaign	<ul style="list-style-type: none"> <li>• Regional chambers of commerce</li> <li>• Real estate brokers</li> <li>• South County local governments</li> <li>• Millenia project owners</li> </ul>	2016
Promote new degree programs in engineering, design, and technology and business management at the future four-year university to ensure firms South County can supply workforce talent needed	<ul style="list-style-type: none"> <li>• Four-year university</li> </ul>	2017-2018

## Strategy 3: Expand International Trade and Commerce

### Action Step 1: Promote South County as a target for foreign direct investment and cross-border commerce

TASKS	KEY PARTNER ORGANIZATION(S)	TARGET DATE(S)
Identify resources and partners to develop South County EB-5 promotional materials and investment opportunities	<ul style="list-style-type: none"> <li>San Diego Regional Investment Center</li> <li>GO-Biz</li> </ul>	Q4 2014
Convene key partners to develop target list of international delegation leaders	<ul style="list-style-type: none"> <li>San Diego Regional Investment Center</li> <li>GO-Biz</li> <li>SDREDC</li> <li>Financial sector leaders</li> </ul>	Q1-Q3 2015
Develop strategy for South County participation in international trade delegation trips to Asia and Latin America	<ul style="list-style-type: none"> <li>South County local governments</li> <li>SDREDC</li> <li>GO-Biz</li> <li>Prominent finance and business leaders</li> </ul>	2015-2017

### Action Step 2: Promote creation of border business conference center

TASKS	KEY PARTNER ORGANIZATION(S)	TARGET DATE(S)
Convene a working group to explore feasibility of conference center	<ul style="list-style-type: none"> <li>South County local governments</li> <li>Mexican local governments</li> <li>Tijuana EDC</li> <li>Real estate brokers</li> <li>Chambers of commerce</li> </ul>	Q3-Q4 2015
Commission and act on results from project feasibility report	<ul style="list-style-type: none"> <li>South County/Mexico local government</li> <li>Tijuana EDC</li> <li>Real estate brokers</li> <li>Regional chambers of commerce</li> </ul>	2016-2017

### Action Step 3: Develop a global executive MBA program at the four-year university in partnership with a major Mexican university

TASKS	KEY PARTNER ORGANIZATION(S)	TARGET DATE(S)
Explore potential partnerships with Mexican universities	<ul style="list-style-type: none"> <li>Four-year university</li> <li>Mexican local governments</li> <li>Tijuana EDC</li> </ul>	2015-2016
Consult with universities on lessons learned from existing global executive MBA programs (e.g. UCLA-UAI; Duke)	<ul style="list-style-type: none"> <li>Existing universities with similar programs</li> <li>Four-year university</li> </ul>	2015-2016
Develop strategy for South County participation in delegation trips to Mexico to develop partnership with a university	<ul style="list-style-type: none"> <li>Four-year university</li> <li>Mexican local governments</li> <li>Mexican universities</li> </ul>	2016-2018

## Strategy 4: Grow South County's Eco-Tourism Industry



<b>Action Step 1: Implement an eco-tourism marketing campaign</b>		
<b>TASKS</b>	<b>KEY PARTNER ORGANIZATION(S)</b>	<b>TARGET DATE(S)</b>
Collect supporting data and develop collateral material for marketing campaign	<ul style="list-style-type: none"> <li>• Regional chambers of commerce</li> <li>• Existing tourism organizations</li> <li>• Existing eco-tourism destinations</li> <li>• South County local governments</li> <li>• Existing hospitality organizations</li> <li>• Public relations/marketing firm</li> </ul>	2015
Promote and leverage South County's existing natural assets in order to grow the nascent eco-tourism industry and provide economic benefits for local communities	<ul style="list-style-type: none"> <li>• Chula Vista Bayfront development owner</li> <li>• Bayshore Bikeway</li> <li>• San Diego Bay National Wildlife Refuge</li> <li>• Living Coast Discovery Center</li> <li>• Tijuana River National Estuarine Research Reserve</li> <li>• Port of San Diego</li> <li>• Other existing eco-tourism destinations</li> <li>• Regional chambers of commerce</li> <li>• Existing tourism organizations</li> <li>• South County local governments</li> <li>• Existing hospitality organizations</li> <li>• Public relations/marketing firm</li> </ul>	2016-2018
<b>Action Step 2: Promote new eco-tourism efforts</b>		
<b>TASKS</b>	<b>KEY PARTNER ORGANIZATION(S)</b>	<b>TARGET DATE(S)</b>
Leverage infrastructure investments to delve deeper into fostering future opportunities for eco-tourism	<ul style="list-style-type: none"> <li>• SANDAG</li> <li>• South County local governments</li> <li>• SDMTS</li> <li>• Mexican local governments</li> </ul>	2015-2016

## Strategy 4: Grow South County's Eco-Tourism Industry

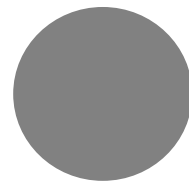
<b>Action Step 3: Design training programs for higher-paying jobs in the eco-tourism and hospitality industry</b>		
<b>TASKS</b>	<b>KEY PARTNER ORGANIZATION(S)</b>	<b>TARGET DATE(S)</b>
Research areas of potential eco-tourism workforce growth	<ul style="list-style-type: none"> <li>San Diego Workforce Partnership</li> <li>Existing tourism organizations</li> </ul>	2016
Determine educational programming needed for various eco-tourism jobs to identify educational gaps and barriers	<ul style="list-style-type: none"> <li>San Diego Workforce Partnership</li> <li>Regional colleges</li> <li>Existing tourism organizations</li> <li>Existing eco-tourism destinations</li> </ul>	2016
Develop partnerships to create educational programming and future employment pipeline	<ul style="list-style-type: none"> <li>San Diego Workforce Partnership</li> <li>Existing/future tourism organizations</li> <li>Existing eco-tourism destinations</li> </ul>	2017-2018
Train hospitality (hotel, restaurant) and retail workers as eco-tourism ambassadors	<ul style="list-style-type: none"> <li>San Diego Workforce Partnership</li> <li>Existing eco-tourism destinations</li> </ul>	2017-2018

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- <sup>35</sup> Location quotient (LQ) is a valuable way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. It can reveal a particular region's strengths in comparison to the national average.
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