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BOARD OF DIRECTORS AGENDA

Friday, October 25, 2013

9 a.m. to 12 noon

**SANDAG Board Room
401 B Street, 7th Floor
San Diego**

AGENDA HIGHLIGHTS

- **RECOGNITION OF OUTGOING *TransNet* INDEPENDENT TAXPAYER OVERSIGHT COMMITTEE MEMBER**
- **ANNUAL REVIEW AND PROPOSED AMENDMENTS TO BOARD POLICIES AND BYLAWS**

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MESSAGE FROM THE CLERK

In compliance with Government Code §54952.3, the Clerk hereby announces that the compensation for legislative body members attending the following simultaneous or serial meetings is: Executive Committee (EC) \$100, Board of Directors (BOD) \$150, and Regional Transportation Commission (RTC) \$100. Compensation rates for the EC and BOD are set pursuant to the SANDAG Bylaws and the compensation rate for the RTC is set pursuant to state law.

MISSION STATEMENT

The 18 cities and county government are SANDAG serving as the forum for regional decision-making. SANDAG builds consensus, makes strategic plans, obtains and allocates resources, plans, engineers, and builds public transit, and provides information on a broad range of topics pertinent to the region's quality of life.

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Public comments regarding the agenda can be sent to SANDAG via comment@sandag.org. Please include the agenda item, your name, and your organization. Email comments should be received no later than 12 noon, two working days prior to the Board of Directors meeting. **Any handouts, presentations, or other materials from the public intended for distribution at the Board of Directors meeting should be received by the Clerk of the Board no later than 12 noon, two working days prior to the meeting.**

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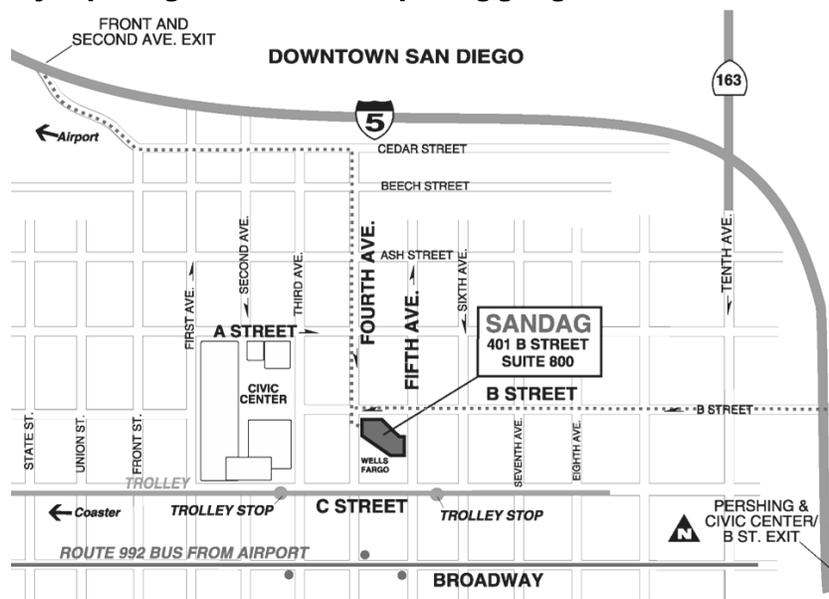
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BOARD OF DIRECTORS

Friday, October 25, 2013

****REVISED****

ITEM #		RECOMMENDATION
+1.	APPROVAL OF MEETING MINUTES +1A. SEPTEMBER 13, 2013, BOARD POLICY MEETING MINUTES +1B. SEPTEMBER 27, 2013, BOARD BUSINESS MEETING MINUTES	APPROVE
2.	PUBLIC COMMENTS/COMMUNICATIONS/MEMBER COMMENTS Public comments under this agenda item will be limited to five public speakers. Members of the public shall have the opportunity to address the Board on any issue within the jurisdiction of SANDAG that is not on this agenda. Other public comments will be heard during the items under the heading "Reports." Anyone desiring to speak shall reserve time by completing a "Request to Speak" form and giving it to the Clerk of the Board prior to speaking. Public speakers should notify the Clerk of the Board if they have a handout for distribution to Board members. Public speakers are limited to three minutes or less per person. Board members also may provide information and announcements under this agenda item.	
+3.	ACTIONS FROM POLICY ADVISORY COMMITTEES (Kim Kawada) This item summarizes the actions taken by the Transportation and Regional Planning Committees on October 4, the Executive Committee on October 11, and the Transportation and Public Safety Committees on October 18, 2013.	APPROVE
CONSENT (4 through 10)		
+4.	PROPOSED FY 2014 PROGRAM BUDGET AMENDMENT: SANTA MARGARITA RIVER BRIDGE AND SECOND TRACK PROJECT (Ramon Ruelas) The Santa Margarita River Bridge and Second Track Project will add new double track in addition to replacing the existing single-track bridge with a new double-track bridge. Several unanticipated circumstances and events have resulted in impacts to the overall project schedule and cost, which cannot be absorbed by the existing project budget. The Transportation Committee recommends that the Board of Directors approve an amendment to the FY 2014 Program Budget to increase the Santa Margarita River Bridge and Second Track Project (CIP 1141600) by \$1.3 million funded from State Traffic Congestion Relief Program funds.	APPROVE
+5.	PROPOSED FY 2014 PROGRAM BUDGET AMENDMENT: EAST COUNTY BUS MAINTENANCE FACILITY(John Dorow) The Transportation Committee recommends that the Board of Directors approve an amendment to the FY 2014 Program Budget to transfer \$5 million from the SANDAG East County Bus Maintenance Facility (ECBMF) Project (CIP 1049600) to the Metropolitan Transit System for the construction of a compressed natural gas station at the ECBMF in El Cajon.	APPROVE

- +6. **PROPOSED FY 2014 PROGRAM BUDGET AMENDMENT: CENTRALIZED TRAIN CONTROL MAINTENANCE PROJECT (Francine Jimenez)** **APPROVE**

The Transportation Committee recommends that the Board of Directors authorize the Executive Director to enter into a Memorandum of Understanding with the Metropolitan Transit System to accept \$1,152,229 for the Centralized Train Control Maintenance Project (OWP 33123.00) and approve the proposed amendment to the FY 2014 Program Budget.

- +7. **2014 BOARD OF DIRECTORS AND POLICY ADVISORY COMMITTEE ANNUAL MEETING CALENDAR (Kim Kawada)*** **APPROVE**

The Board of Directors is asked to approve the calendar of meetings of the Board and the Policy Advisory Committees for the upcoming year.

- +8. **SERIES 13 REGIONAL GROWTH FORECAST (Clint Daniels and Kirby Brady)*** **ACCEPT**

During the past year, SANDAG staff, representatives and elected officials from each of the San Diego region’s 19 jurisdictions, and stakeholders have worked together to develop a long-range growth forecast for the San Diego region and its neighborhoods. The Board of Directors is asked to accept the Series 13 Regional Growth Forecast for use in San Diego Forward: The Regional Plan and other planning efforts.

- +9. **REPORT SUMMARIZING DELEGATED ACTIONS TAKEN BY THE EXECUTIVE DIRECTOR (André Douzdjian)*** **INFORMATION**

In accordance with various SANDAG Board Policies, this report summarizes certain delegated actions taken by the Executive Director since the last Board of Directors meeting.

- +10. **REPORT ON MEETINGS AND EVENTS ATTENDED ON BEHALF OF SANDAG (Kim Kawada)** **INFORMATION**

Board members will provide brief reports orally or in writing on external meetings and events attended on behalf of SANDAG since the last Board of Directors meeting.

CHAIR’S REPORT (11)

- 11. **RECOGNITION OF OUTGOING *TransNet* INDEPENDENT TAXPAYER OVERSIGHT COMMITTEE MEMBER*** **INFORMATION**

The Board of Directors will recognize John Chalker, an outgoing member of the *TransNet* Independent Taxpayer Oversight Committee.

REPORTS (12 through 13)

- +12. **APPROVAL OF PROPOSED CONSTRUCTION AWARD (First Vice Chair Jim Janney; Laura Coté)*** **APPROVE**

The Board of Directors is asked to authorize the Executive Director to execute a construction contract award for the Sorrento Valley Double Track Project.

+13. ANNUAL REVIEW AND PROPOSED AMENDMENTS TO BOARD POLICIES AND BYLAWS (First Vice Chair Jim Janney; John Kirk)* APPROVE

The Executive Committee recommends that the Board of Directors: (1) approve the proposed amendments to the Board Policies discussed in the report; and (2) renew the annual delegation of authority to the Executive Director pursuant to Board Policy No. 003: Investment Policy; ~~and (3) renew its approval of Board Policy No. 032: San Diego County Regional Transportation Commission Interest Rate Swap Policy, as amended.~~

14. CONTINUED PUBLIC COMMENTS

If the five speaker limit for public comments was exceeded at the beginning of this agenda, other public comments will be taken at this time. Subjects of previous agenda items may not again be addressed under public comment.

15. UPCOMING MEETINGS INFORMATION

The Board Policy meeting scheduled for Friday, November 1, 2013, has been cancelled. The next Board Business meeting is scheduled for Friday, November 15, 2013, at 9 a.m. (Third Friday due to the Thanksgiving Holiday).

16. ADJOURNMENT

+ next to an agenda item indicates an attachment

* next to an agenda item indicates a San Diego County Regional Transportation Commission item



BOARD OF DIRECTORS
OCTOBER 25, 2013

AGENDA ITEM NO. 13-10-8

ACTION REQUESTED - ACCEPT

SERIES 13 REGIONAL GROWTH FORECAST

File Number 3100900

Introduction

During the past year, SANDAG staff, representatives and elected officials from each of the San Diego region's 19 jurisdictions, and stakeholders have worked together to develop a long-range growth forecast for the San Diego region and its neighborhoods.

Recommendation

The Board of Directors is asked to accept the Series 13 Regional Growth Forecast for use in San Diego Forward: The Regional Plan and other planning efforts.

Discussion

The Series 13 Regional Growth Forecast and accompanying slide presentation (Attachment 1) was presented to the Regional Planning Committee and the Board of Directors in September, and presentations have been made to the majority of the jurisdictions during the past several months.

Next Steps

Upon acceptance, the Series 13 Regional Growth Forecast will be used to inform SANDAG planning efforts such as San Diego Forward: The Regional Plan as well as by partner agencies such as the San Diego County Water Authority for use in its Urban Water Management Plan.

GARY L. GALLEGOS
Executive Director

Attachment: 1. Series 13 Regional Growth Forecast Report, Table, and Slide Presentation from September 13, 2013, Board of Directors meeting

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**BOARD OF DIRECTORS
SEPTEMBER 13, 2013**

**AGENDA ITEM NO. 13-9-2
ACTION REQUESTED - INFORMATION**

**SERIES 13 REGIONAL GROWTH FORECAST:
DRAFT SUBREGIONAL FORECAST**

File Number 3100900

Introduction

During the past 12 months, SANDAG staff and representatives and elected officials from each of the San Diego region's 19 jurisdictions and stakeholders have worked together to develop a long-range growth forecast for the San Diego region and its neighborhoods. The Series 13 Regional Growth Forecast¹ will serve as the foundation for San Diego Forward: The Regional Plan, including the alternative land use and transportation scenarios and other planning documents (e.g., water, general plans) across the region. The preliminary results of that effort are described in detail, below.

Discussion

Overview of Forecasted Regional Growth

As shown in Table 1, SANDAG projects the region's population will grow by nearly one million people by 2050. This forecast is consistent with previous expectations, although future growth rates have been reduced due to increased domestic migration out of the region. The growth in population will drive job growth and housing demand within the region, adding nearly 500,000 jobs and more than 330,000 housing units by 2050.

Table 1: Series 13 San Diego Regional Growth Forecast

	Population		Housing Units		Jobs	
	Total	Percent Average Annual Change	Total	Percent Average Annual Change	Total	Percent Average Annual Change
2010 ²	3,095,313	-	1,158,076	-	1,421,941	-
2012	3,143,429	0.8%	1,165,818	0.3%	1,450,913	1.0%
2020	3,435,713	1.1%	1,249,654	0.9%	1,624,124	1.4%
2035	3,853,698	0.8%	1,394,688	0.7%	1,769,938	0.6%
2050	4,068,759	0.4%	1,491,804	0.4%	1,911,405	0.5%
2010-2050	973,446	0.7%	333,728	0.6%	489,464	0.7%

¹ SANDAG denotes forecasts by a sequential series number. The current working forecast is known as the Series 13: 2050 Regional Growth Forecast. The forecast used in the 2050 Regional Transportation Plan and its Sustainable Communities Strategy adopted by the Board of Directors in October 2011 was the Series 12: 2050 Regional Growth Forecast.

² Data from 2010 are included as reference to the U.S. Census for population. Housing and Jobs in 2010 are sourced from the SANDAG land inventory system and California Employment Development Department. San Diego Forward: The Regional Plan will use 2012 as its reference year.

Much of the region's growth will be driven by natural increase, total births minus deaths. Longer life expectancies will contribute to the aging population seen in the outer years of the forecast, while the trends of increased deaths (as a result of the older population) and net out-migration will factor into the slower growth rates anticipated in the future. By 2050 it is expected that nearly 20 percent of the population will be ages 65 and over, compared with just 12 percent today.

In terms of the race and ethnic composition of the region, significant changes are on the horizon. The 2010 census revealed San Diego to now be a majority-minority region, meaning no single race or ethnic group comprises more than 50 percent of the total population. In 2010 the two dominant race and ethnic groups were non-Hispanic whites and Hispanics, accounting for 48 percent and 32 percent of the region's total population, respectively. By 2050, however, it is expected that Hispanics will account for more than 46 percent of the total population while the non-Hispanic White population will decline to approximately 30 percent. The Asian population is expected to increase to more than 15 percent, up from 11 percent in 2010. Non-Hispanic blacks, two or more races, and "other" groups each comprise less than 5 percent of the total population today and are expected to remain relatively unchanged out to 2050.

Changing Local Plans

This forecast represents a continuing trend in the San Diego region to provide more housing and job opportunities in the existing urbanized areas of the region. Since 1999, more than three quarters of the local jurisdictions have made or are in the process of making significant updates to their general plans. In 1999, SANDAG projected 21 percent of future housing growth would occur in the unincorporated areas of the county under the local general plans at the time. Today, SANDAG expects 17 percent of growth to occur in the unincorporated areas, and much of that is focused in existing villages such as Lakeside, Valley Center, Ramona, and Alpine. As a result of these updates, SANDAG has identified sufficient housing opportunities in the existing general plans for the first time in nearly two decades.

The forecasted growth also reflects more sustainable general plans from the local jurisdictions. At the turn of the century, about 90 percent of vacant residential land in the cities was planned for single-family use. The Series 13 Forecast shows 82 percent of housing growth by 2050 being multifamily. Local and regional conservation programs also continue to protect more of the San Diego region's sensitive lands. Currently, more than 50 percent of the region is preserved as open space, parks, or habitat, and SANDAG forecasts that dedicated open space will increase by almost 30 percent by 2050.

General Intensification of Existing Uses

As a result of changing local plans, SANDAG forecasts a general intensification of existing land uses within urban communities and along key transportation corridors. For example, National City's general plan update results in opportunities for more than 10,000 additional multifamily units near the Blue Line Trolley and the planned Trolley line connecting San Ysidro and University Towne Centre (UTC) via National City. San Marcos has drafted specific plans for the San Marcos Creek and University districts, adding mixed-use developments near California State University, San Marcos and the SPRINTER rail corridor. Finally, over half of the growth in new housing will occur in the city of San Diego. Downtown San Diego will continue to thrive over the next few decades, and the growth also will start to occur into areas of Barrio Logan, Golden Hill, and Uptown communities.

In terms of jobs, SANDAG expects the existing employment centers to continue to thrive. The UTC/Sorrento Valley/Torrey Mesa employment cluster will continue to be the largest job center in the region. SANDAG expects downtown San Diego to add another 30,000 jobs by 2050. The Otay Mesa border area will become a much larger job center, growing from approximately 15,000 jobs today to more than 45,000 by 2050. Finally, Chula Vista will add nearly 50,000 new jobs as the Chula Vista Bayfront, downtown investments, and new planned communities in eastern Chula Vista come online.

More detailed results of this growth forecast are shown by jurisdiction in Attachment 1.

SANDAG Forecasting Process

The SANDAG forecast is completed in two steps. The first is the development of a regional forecast of population, housing, and jobs. The regional forecast establishes the framework for the next step, the subregional forecast. The regional forecast is developed by SANDAG, with input from expert demographers, economists, developers, local planning directors, and natural resource managers. These experts review economic and demographic assumptions about fertility, migration, inflation, and other indicators. In addition to the traditional expert panel review conducted by the agency, SANDAG also has reviewed the forecast with key stakeholders across the region, including transportation, land use, and economic development advocates.

SANDAG uses its Demographic and Economic Forecasting Model (DEFM) to develop the regional forecast. DEFM was first developed to support the Series 4 forecast in the late 1970s. DEFM uses a standard demographic (i.e., cohort-survival) economic modeling technique to estimate future growth. Forecasts developed using DEFM have had strong accuracy; since Series 4 (1977), on average DEFM regional forecasts have been within 4 percent of observed population growth.

The DEFM results feed the subregional allocation models to develop city- and community-level forecasts. The Series 13 subregional forecast employs a new tool called the Production, Exchange, Consumption, and Allocation System (PECAS). This new model offers several enhancements beyond the subregional forecasting models used in prior forecasts by introducing economic conditions and return on investment calculations into the projections of development, redevelopment, and infill. PECAS, in addition to new data sources, continues to rely upon the land use plans, policies, and zoning ordinances of the 18 cities, the County of San Diego, and other land use authorities.

For the development of the subregional forecast, SANDAG staff works extensively with each jurisdiction to collect and verify detailed land use inputs down to the parcel level. The data collected includes information on remaining housing capacity, zoning, existing and planned land use, as well as constraints to development (e.g., steep slopes, habitat lands, floodplains, etc.).

In addition to providing land use information, each jurisdiction is asked to provide guidance on the most likely development patterns for their jurisdiction by 2050.

A preliminary draft of the subregional forecast was presented to the Regional Planning Technical Working Group (the region's planning directors) on June 13, 2013. SANDAG staff consulted with each jurisdiction to review these numbers and incorporate any necessary changes to the revised draft subregional forecast.

This report is scheduled to be presented to the Regional Planning Committee for discussion at its September 6, 2013, meeting. Any comments resulting from that discussion will be included in the September 13, 2013, presentation to the Board of Directors.

GARY L. GALLEGOS
Executive Director

Attachment: 1. Draft Series 13 Subregional Growth Forecast

Key Staff Contacts: Kirby Brady, (619) 699-6924, kirby.brady@sandag.org
Clint Daniels, (619) 699-6946, clint.daniels@sandag.org

Draft Series 13 Subregional Growth Forecast

Disclaimer: This forecast represents one possibility for future growth in the San Diego region. It is intended to represent a likely prediction of future growth, but it is not intended to be a prescription for growth. The Series 13 Regional Growth Forecast represents a combination of economic and demographic projections and existing plans and policies.

POPULATION

	Actual		Projections		Numeric Change by Increment			Change 2010 - 2050		
	2010	2020	2035	2050	2010-2020	2020-35	2035-50	Total	Percent	Avg Ann
Carlsbad	105,185	118,241	123,634	123,942	13,056	5,393	308	18,757	17.8%	0.4%
Chula Vista	243,916	286,744	320,297	343,752	42,828	33,553	23,455	99,836	40.9%	0.9%
Coronado	24,697	23,633	24,145	24,286	(1,064)	512	141	(411)	-1.7%	0.0%
Del Mar	4,161	4,412	4,668	4,784	251	256	116	623	15.0%	0.3%
El Cajon	99,478	102,745	109,222	115,419	3,267	6,477	6,197	15,941	16.0%	0.4%
Encinitas	59,518	62,829	64,718	66,178	3,311	1,889	1,460	6,660	11.2%	0.3%
Escondido	143,951	165,051	172,890	173,253	21,100	7,839	363	29,302	20.4%	0.5%
Imperial Beach	26,324	27,510	30,354	31,579	1,186	2,844	1,225	5,255	20.0%	0.5%
La Mesa	57,065	61,092	70,151	77,411	4,027	9,059	7,260	20,346	35.7%	0.8%
Lemon Grove	25,320	26,821	28,774	30,796	1,501	1,953	2,022	5,476	21.6%	0.5%
National City	58,582	62,265	74,343	85,424	3,683	12,078	11,081	26,842	45.8%	0.9%
Oceanside	167,344	177,929	188,865	190,129	10,585	10,936	1,264	22,785	13.6%	0.3%
Poway	47,811	50,010	52,670	52,860	2,199	2,660	190	5,049	10.6%	0.3%
San Diego	1,301,617	1,454,150	1,664,684	1,766,700	152,533	210,534	102,016	465,083	35.7%	0.8%
San Marcos	83,781	98,940	108,470	112,323	15,159	9,530	3,853	28,542	34.1%	0.7%
Santee	53,413	59,488	63,518	66,279	6,075	4,030	2,761	12,866	24.1%	0.5%
Solana Beach	12,867	13,409	14,311	14,941	542	902	630	2,074	16.1%	0.4%
Vista	93,719	96,973	112,175	126,508	3,254	15,202	14,333	32,789	35.0%	0.8%
Unincorporated	486,564	543,471	625,809	662,195	56,907	82,338	36,386	175,631	36.1%	0.8%
Region Total	3,095,313	3,435,713	3,853,698	4,068,759	340,400	417,985	215,061	973,446	31.4%	0.7%

HOUSING

	Actual		Projections		Numeric Change by Increment			Change 2010 - 2050		
	2010	2020	2035	2050	2010-2020	2020-35	2035-50	Total	Percent	Avg Ann
Carlsbad	44,422	48,390	49,978	50,212	3,968	1,588	234	5,790	13.0%	0.3%
Chula Vista	78,384	89,063	98,924	107,471	10,679	9,861	8,547	29,087	37.1%	0.8%
Coronado	9,581	9,667	9,702	9,799	86	35	97	218	2.3%	0.1%
Del Mar	2,606	2,639	2,650	2,667	33	11	17	61	2.3%	0.1%
El Cajon	35,884	36,180	38,126	40,766	296	1,946	2,640	4,882	13.6%	0.3%
Encinitas	25,481	26,131	26,633	27,667	650	502	1,034	2,186	8.6%	0.2%
Escondido	47,971	53,563	55,512	55,827	5,592	1,949	315	7,856	16.4%	0.4%
Imperial Beach	9,860	10,014	10,928	11,520	154	914	592	1,660	16.8%	0.4%
La Mesa	25,954	26,463	30,036	33,374	509	3,573	3,338	7,420	28.6%	0.6%
Lemon Grove	8,840	9,100	9,685	10,517	260	585	832	1,677	19.0%	0.4%
National City	16,200	17,423	21,090	24,812	1,223	3,667	3,722	8,612	53.2%	1.1%
Oceanside	65,014	67,965	70,812	71,248	2,951	2,847	436	6,234	9.6%	0.2%
Poway	16,476	16,853	17,602	17,800	377	749	198	1,324	8.0%	0.2%
San Diego	515,426	559,197	640,194	691,629	43,771	80,997	51,435	176,203	34.2%	0.7%
San Marcos	28,174	32,622	35,596	37,118	4,448	2,974	1,522	8,944	31.7%	0.7%
Santee	19,900	21,489	22,687	23,903	1,589	1,198	1,216	4,003	20.1%	0.5%
Solana Beach	6,521	6,583	6,870	7,118	62	287	248	597	9.2%	0.2%
Vista	30,875	31,015	35,369	40,201	140	4,354	4,832	9,326	30.2%	0.7%
Unincorporated	170,507	185,297	212,294	228,155	14,790	26,997	15,861	57,648	33.8%	0.7%
Region Total	1,158,076	1,249,654	1,394,688	1,491,804	91,578	145,034	97,116	333,728	28.8%	0.6%

JOBS

	Actual		Projections		Numeric Change by Increment			Change 2010 - 2050		
	2010	2020	2035	2050	2010-2020	2020-35	2035-50	Total	Percent	Avg Ann
Carlsbad	64,956	77,431	83,938	85,718	12,475	6,507	1,780	20,762	32.0%	0.7%
Chula Vista	64,035	82,966	100,096	114,435	18,931	17,130	14,339	50,400	78.7%	1.5%
Coronado	28,535	29,116	29,247	29,273	581	131	26	738	2.6%	0.1%
Del Mar	4,431	4,542	4,691	4,725	111	149	34	294	6.6%	0.2%
El Cajon	37,626	41,412	45,146	49,780	3,786	3,734	4,634	12,154	32.3%	0.7%
Encinitas	25,643	27,276	28,364	29,542	1,633	1,088	1,178	3,899	15.2%	0.4%
Escondido	47,869	53,495	57,479	59,061	5,626	3,984	1,582	11,192	23.4%	0.5%
Imperial Beach	3,592	4,556	4,805	4,830	964	249	25	1,238	34.5%	0.7%
La Mesa	24,729	28,677	33,847	36,527	3,948	5,170	2,680	11,798	47.7%	1.0%
Lemon Grove	6,639	7,320	7,987	8,653	681	667	666	2,014	30.3%	0.7%
National City	26,826	30,293	32,660	39,785	3,467	2,367	7,125	12,959	48.3%	1.0%
Oceanside	41,142	48,208	52,927	54,091	7,066	4,719	1,164	12,949	31.5%	0.7%
Poway	30,235	34,012	35,809	37,199	3,777	1,797	1,390	6,964	23.0%	0.5%
San Diego	764,671	867,567	934,806	1,009,177	102,896	67,239	74,371	244,506	32.0%	0.7%
San Marcos	36,857	45,793	55,207	64,282	8,936	9,414	9,075	27,425	74.4%	1.4%
Santee	14,229	16,501	18,212	18,565	2,272	1,711	353	4,336	30.5%	0.7%
Solana Beach	7,417	8,156	8,509	8,802	739	353	293	1,385	18.7%	0.4%
Vista	35,124	40,971	48,007	48,812	5,847	7,036	805	13,688	39.0%	0.8%
Unincorporated	157,385	175,832	188,201	208,148	18,447	12,369	19,947	50,763	32.3%	0.7%
Region Total	1,421,941	1,624,124	1,769,938	1,911,405	202,183	145,814	141,467	489,464	34.4%	0.7%

Series 13 Regional Growth Forecast

Preliminary Subregional Forecast

Board of Directors
September 13th, 2013



1



An aging, diversifying
population...

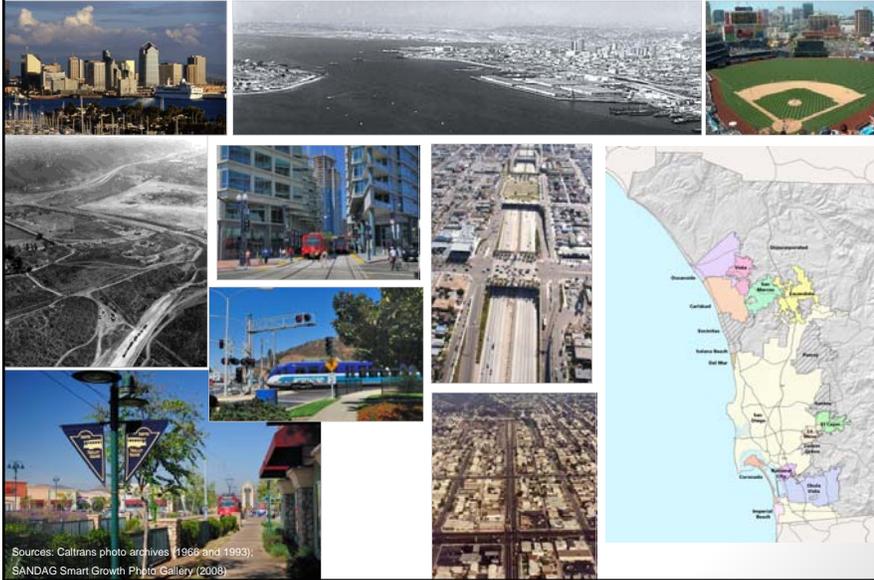
Growing more
sustainably...



Dedicating more
lands to
preservation...

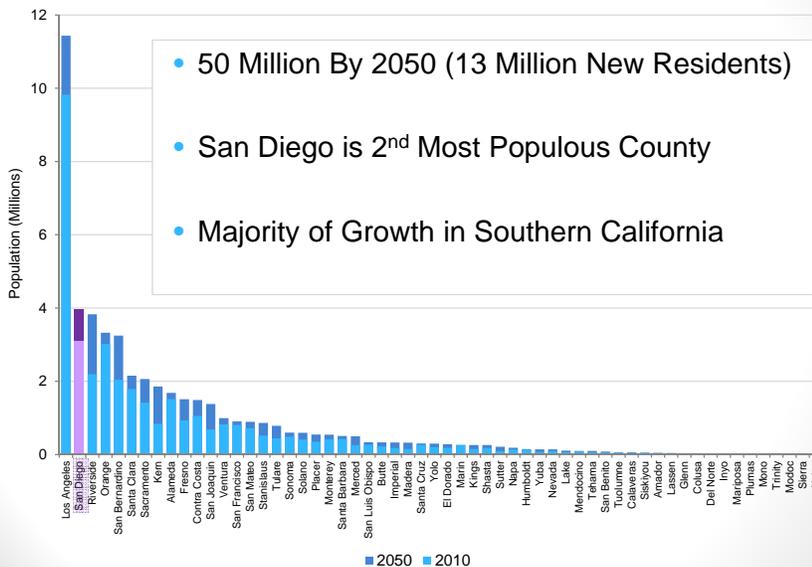
2

Forty Years in San Diego



3

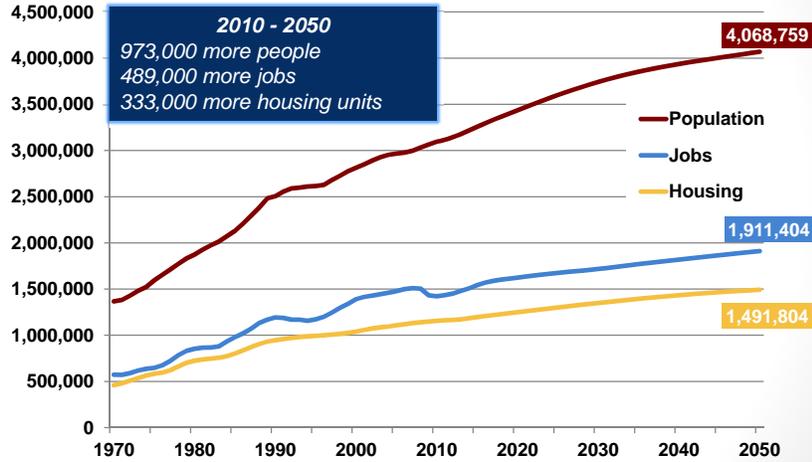
2050 California Forecast



Source: State of California, Department of Finance, Report P-1 (County): State and County Total Population Projections, 2010-2060. Sacramento, California, January 2013.

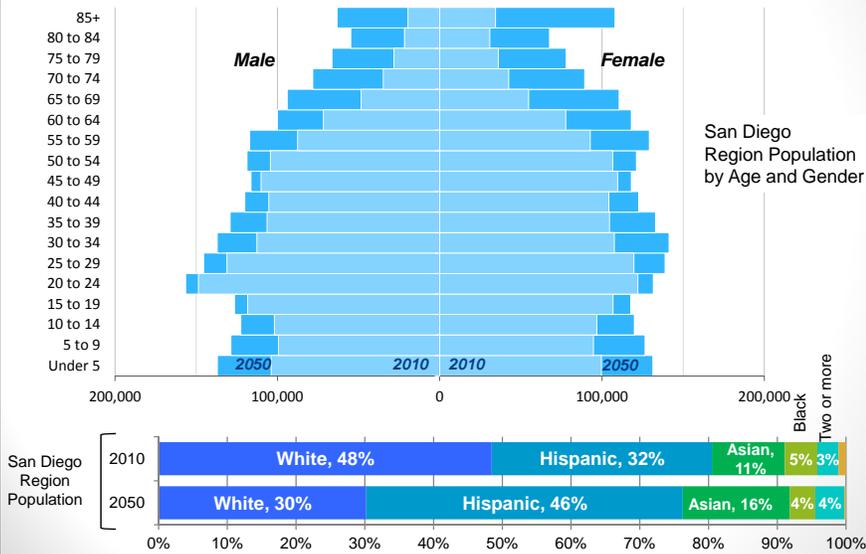
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Population, Jobs, and Housing

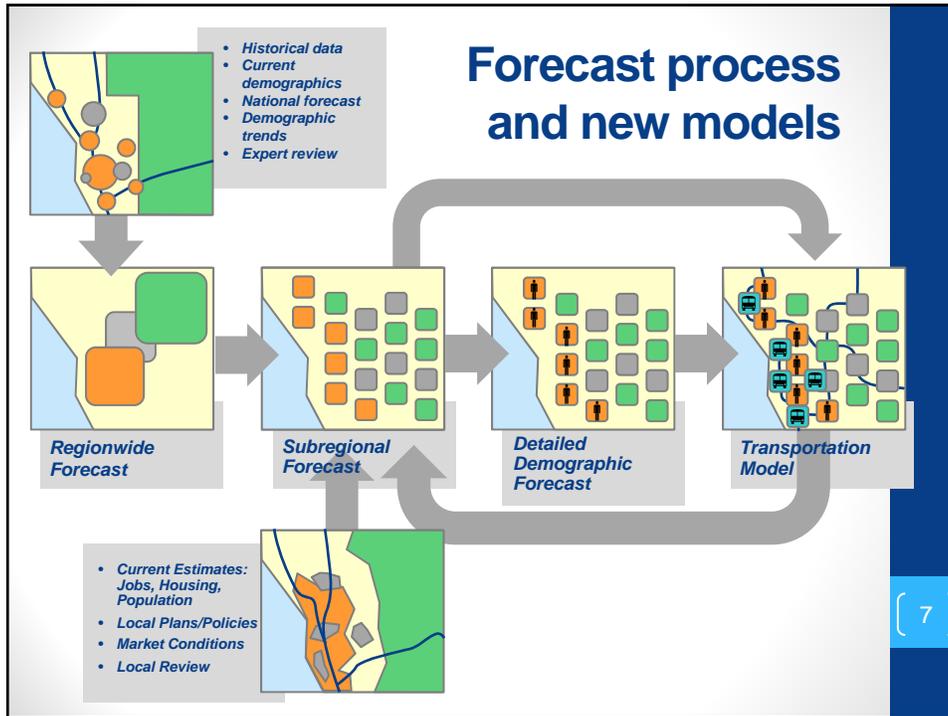


5

Series 13 Subregional Forecast: Population Trends

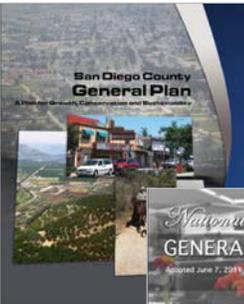
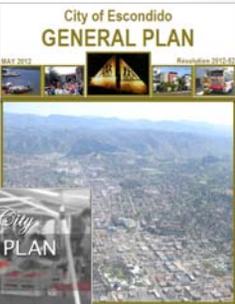
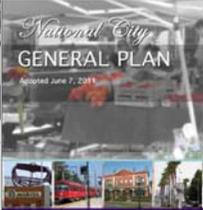


6



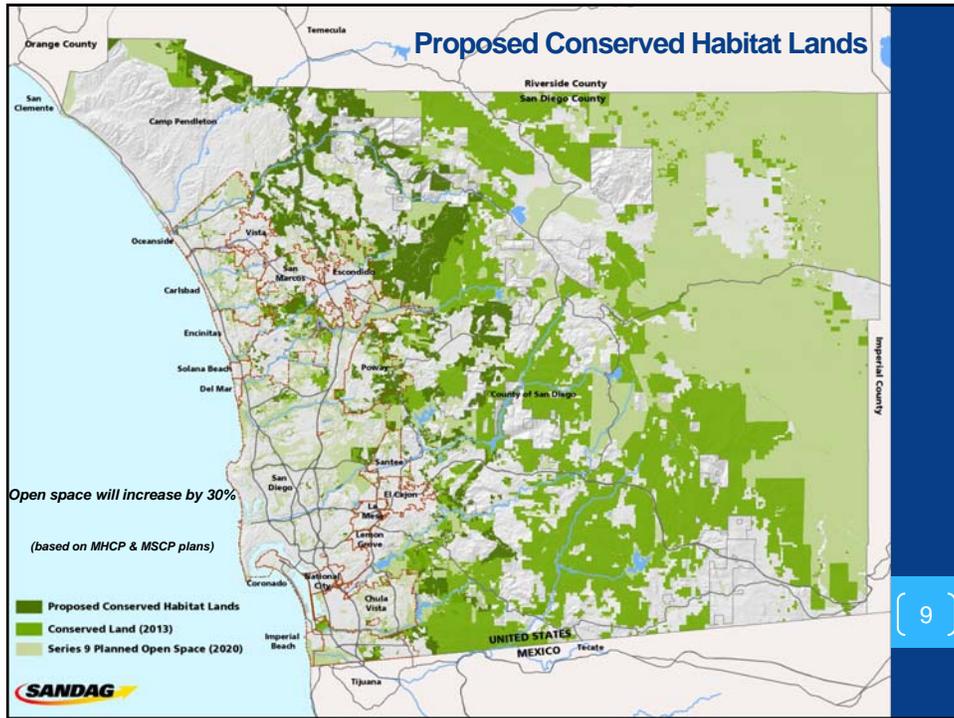
Series 13 Subregional Forecast: Land Use Inputs

- Updated General Plans
 - Chula Vista (SP)
 - Escondido
 - Imperial Beach
 - National City
 - San Diego
 - San Marcos (SP)
 - Vista
 - County
- Site Specific Projects
- Sufficient Housing Lands

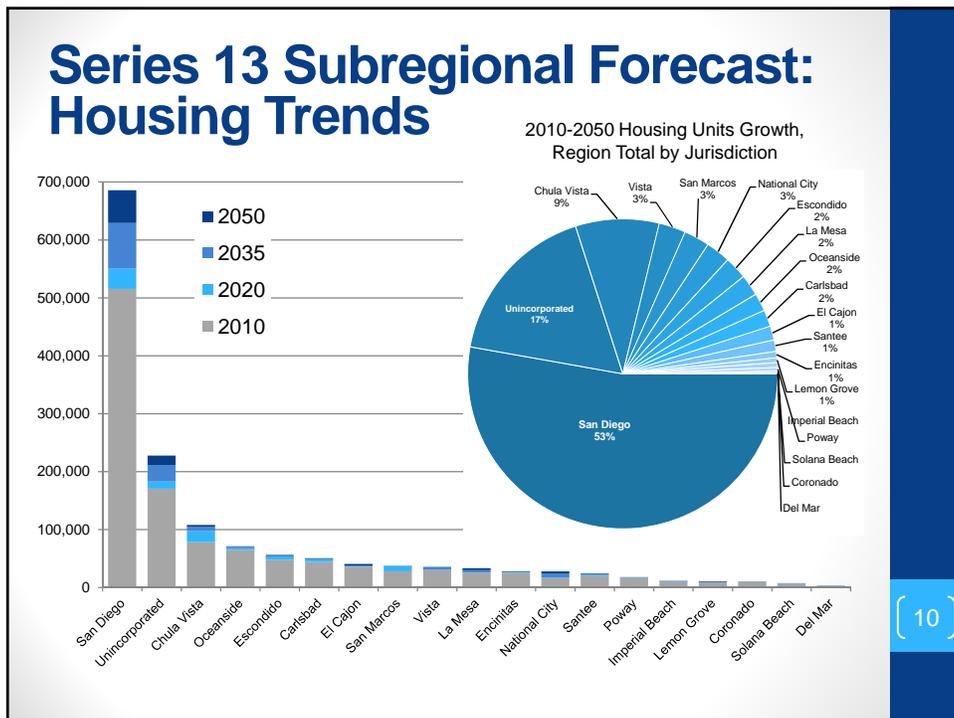






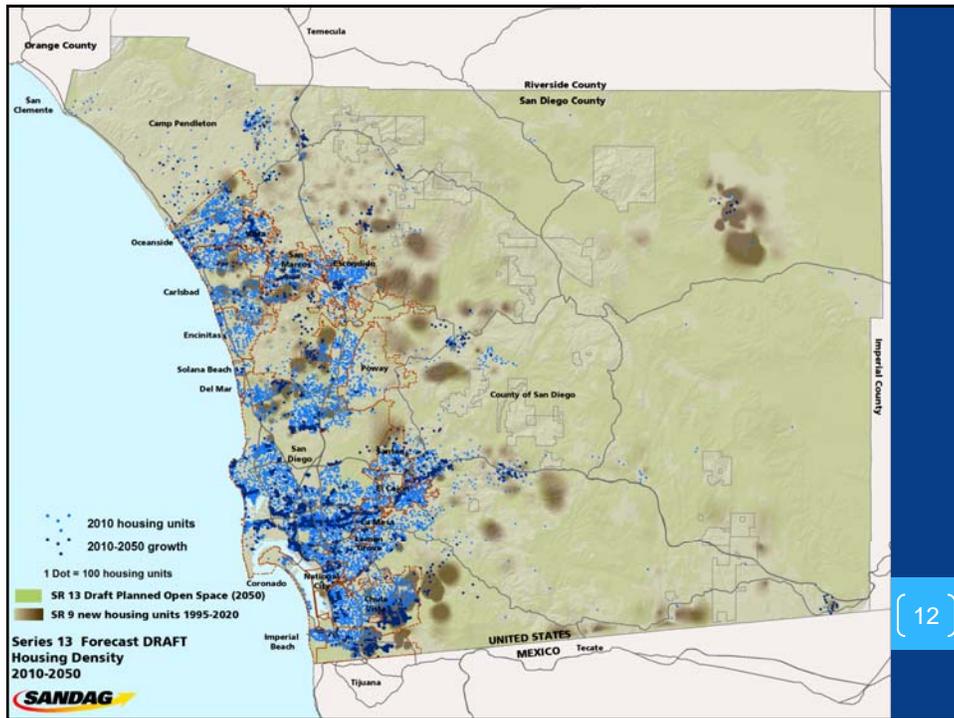
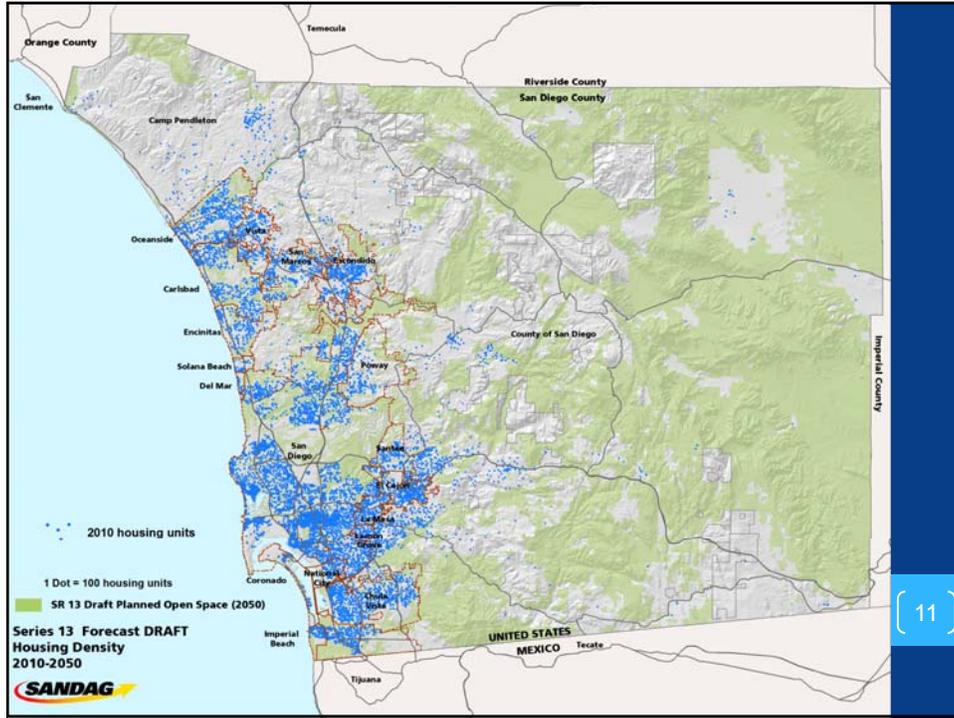
8



9

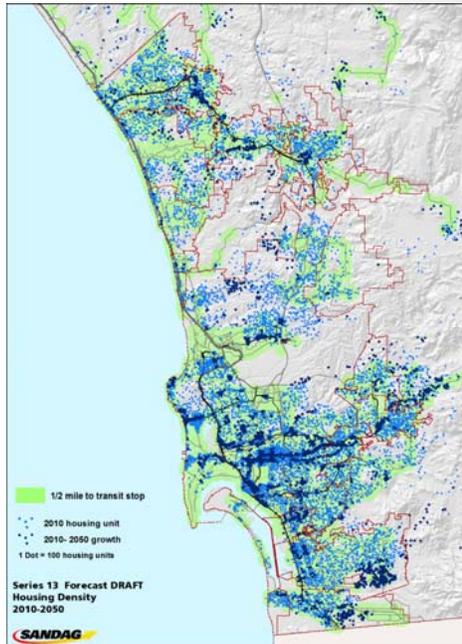
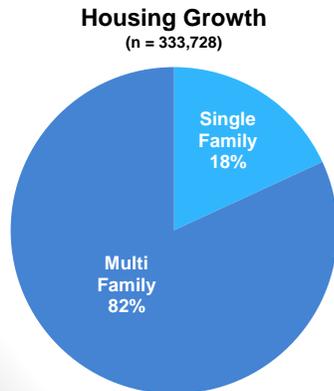


10



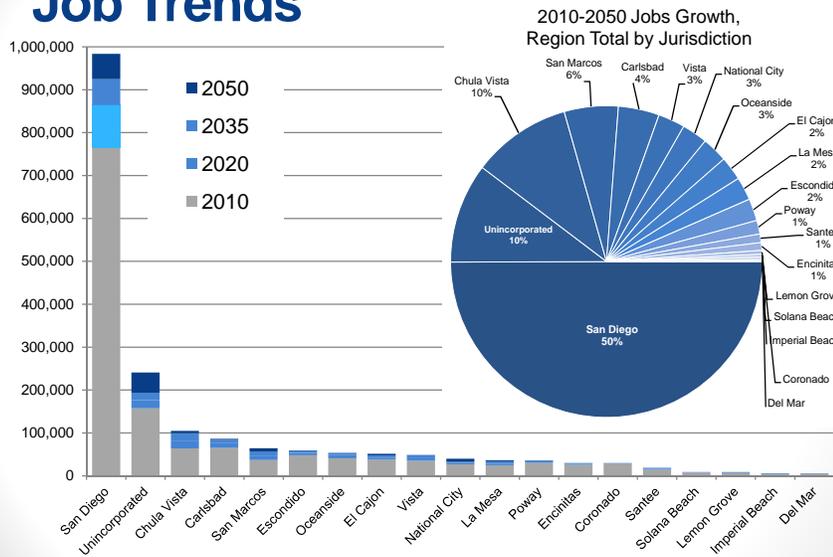
Series 13 Subregional Forecast Housing Growth

- 87% of growth within 1/2 mile to transit

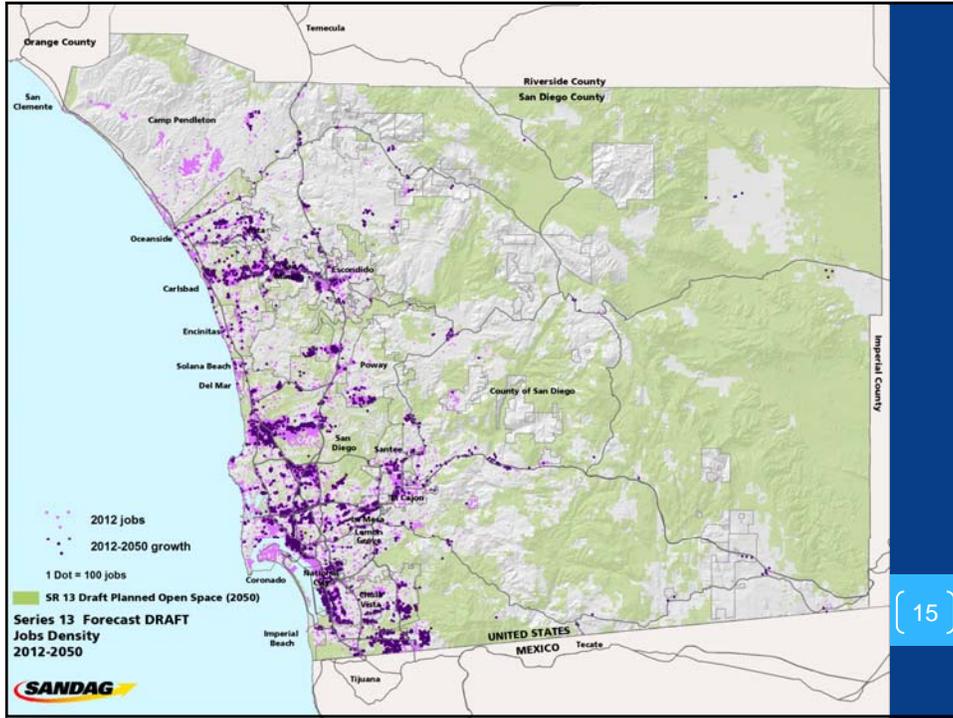


13

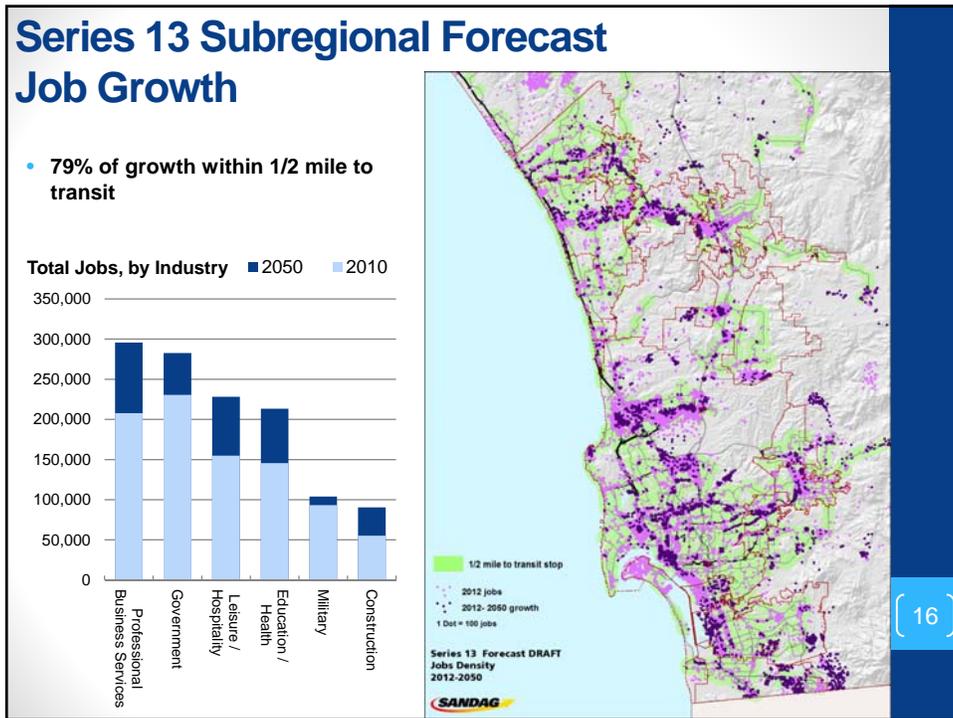
Series 13 Subregional Forecast: Job Trends



14



15



16



An aging, diversifying population...

Growing more sustainably...



Dedicating more lands to preservation...