University Community Plan Update Subcommittee Meeting

May 21, 2019

AGENDA – TUESDAY, MAY 21, 2019

UNIVERSITY Community Plan Update

6:00 CALL TO ORDER / ROLL CALL BY CHAIR – Andy Wiese

APPROVAL OF THE MINUTES – April 16, 2019

NON-AGENDA PUBLIC COMMENT – Two minutes per speaker

6:20 Item 1   INFO ITEM – Recap of progress to date

6:30 Item 2   INFO ITEM – Climate Action Plan (CAP)

(Ashley Rosia-Tremonti, Sustainability Department)

7:10 Item 3   INFO ITEM – Market Demand Analysis & Evaluation of Potential Collocation

(Michael Tactay, Associate, Keyser Marston Associates, Inc.)

7:40 Item 4   ACTION ITEM – Draft CPU Vision Statement & Guiding Principles

8:50 Item 5   NEXT STEPS – Next Meeting – June 18, 2019 (Scripps Health Campus Point

C-Annex, 10010 Campus Point Drive, San Diego, CA 92121)

9:00 ADJOURNMENT

DRAFT UNIVERSITY CPUS SCHEDULE

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Community Plan Update

Online Survey

| 2019 FEB 28 | 2019 MAR 19 | 2019 APR 17 | 2019 MAY 21 | 2019 JUNE 18 | 2019 JULY 16 |

Planning Commission (Workshop #1)

Overview of CPU

Visioning & Guiding Principles exercise

Visioning/Guiding Principles discussion/ activity

Land Use Concepts Brainstorming

Brainstorming with maps on land use possibilities

Climate Action Plan

Relationship to Land Use & Mobility Transit Priority Areas

Market Assessment

KMA

Establish Vision & Guiding Principles

Land Use

Define open space & areas of no change Present focus areas Discussion/activity

Mobility Strategies

Discuss strategies for all modes

Online Survey Results

Discuss survey results

Mobility Existing Conditions

Present existing conditions report Opportunities and Constraints discussion/activity

sandiego.gov

ITEM 2
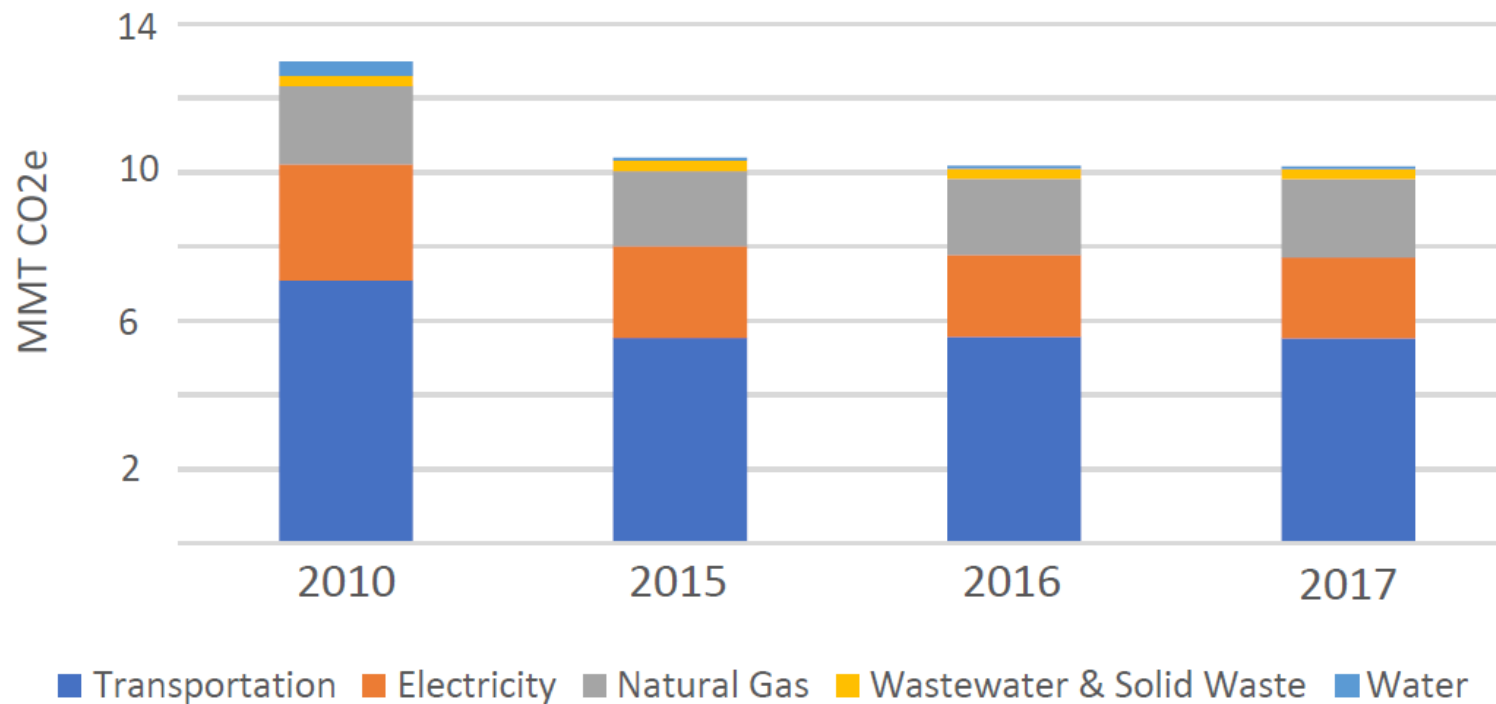CLIMATE ACTION PLAN

The City of SAN DIEGO

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Community Plan Update

Climate Action in San Diego

Cody Hooven
Director/Chief Sustainability Officer
Sustainability Department

The City of
SAN DIEGO

City of San Diego Greenhouse Gas Emissions (2010-2017)

MMT CO2e = million metric tons of carbon dioxide equivalent

2018 ANNUAL REPORT
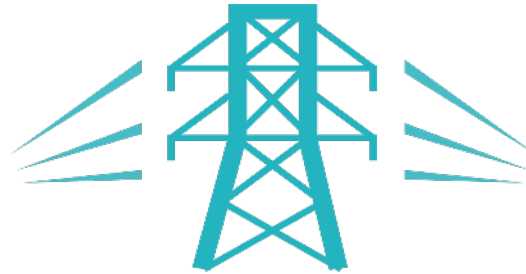Climate Action Plan

2016 Annual Report
Climate Action Plan

2017 Annual Report
Climate Action Plan
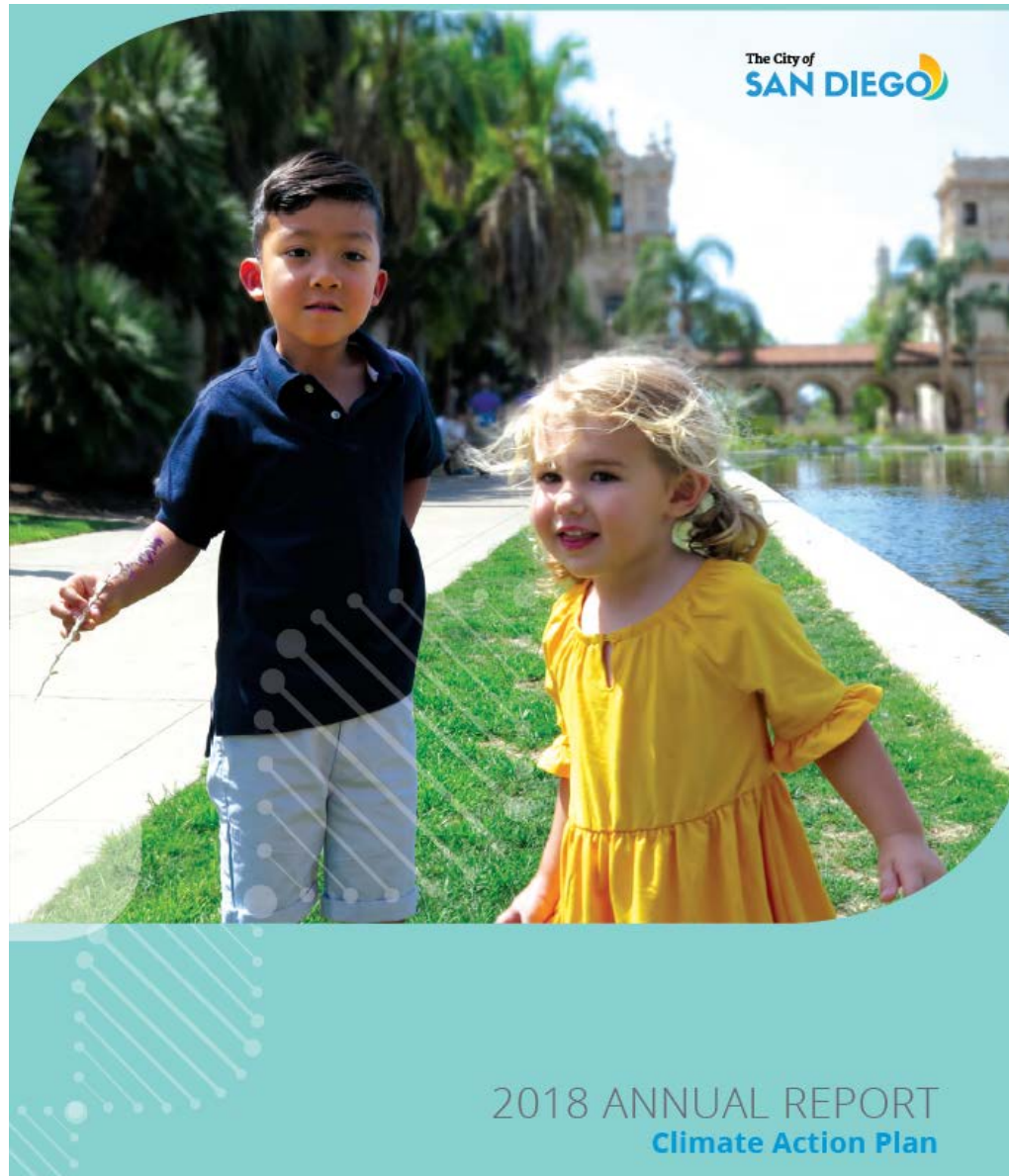
Energy & Water Efficiency

100%

sandiego.gov

Energy Source Options

Utility
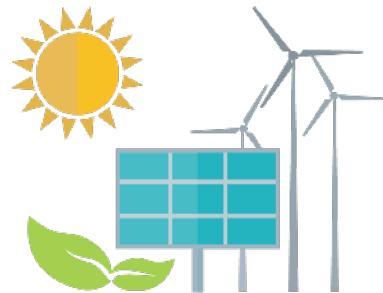
ENERGY SOURCE
SDG&E

ELECTRIC DELIVERY
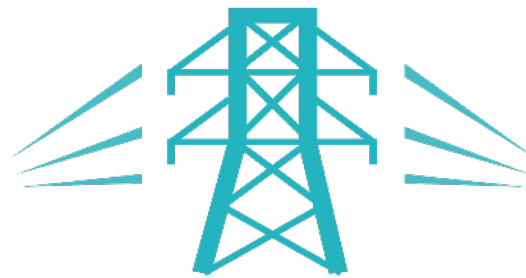**SDG&E Utility Service**

CUSTOMER

OR

CCA

ENERGY SOURCE
CCA

ELECTRIC DELIVERY
SDG&E Utility Service

CUSTOMER
Community Choice

50%

Bicycling, Walking, Transit and Land Use
2018 update

	2010 Baseline	2017	2020 Goal	2035 Goal
	4% commuter transit modeshare	**8%** commuter transit modeshare[1]	12% commuter transit modeshare	**25% commuter transit modeshare**
	3.5% pedestrian commuter modeshare	**3%** pedestrian commuter modeshare[1]	4% pedestrian commuter modeshare	**7% pedestrian commuter modeshare**
	2% bicyclist commuter modeshare	**2%** bicyclist commuter modeshare[1]	6% bicyclist commuter modeshare	**18% bicyclist commuter modeshare**
	40 traffic signals per year, 0 roundabouts	**70** signals retimed, 0 roundabouts in 2017 (2 installed since 2015)	200 traffic signals retimed, 15 roundabouts installed	**35 roundabouts installed**
	25 miles per day commute distance	**20** miles per day commute distance[1]	N/A	**23 miles per day commute distance**

Commuter Survey

Respondents reported that the top reasons for not utilizing active transportation modes or transit were:
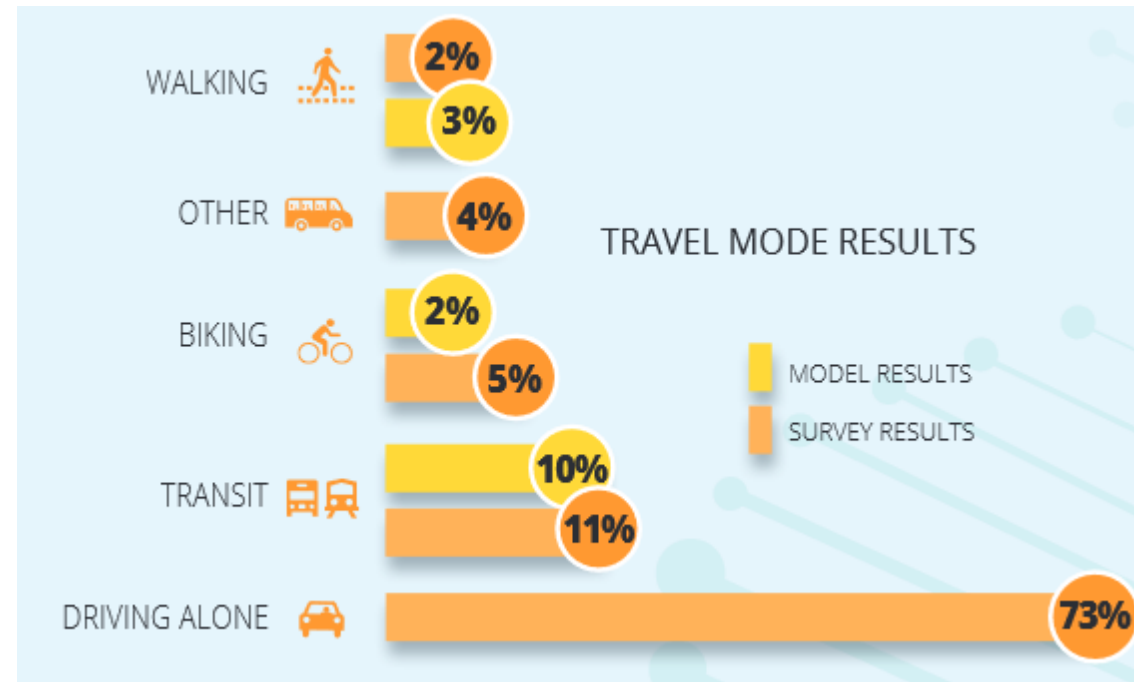
22% TRAVEL TIME
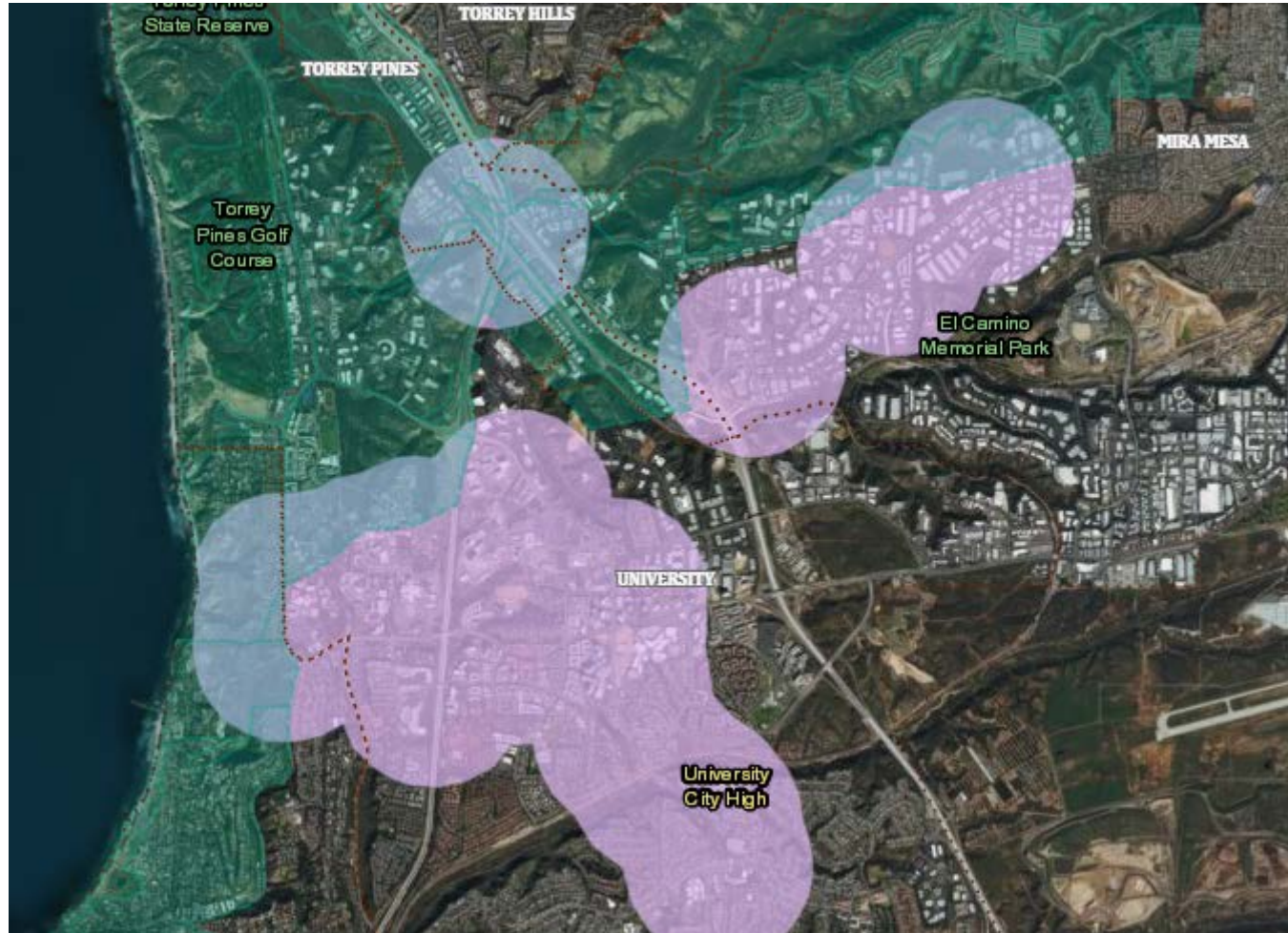
15% Lack of CONNECTIVITY

12% Lack of INFRASTRUCTURE

1% - COST

TRAVEL MODE RESULTS

WALKING — 2% / 3%

OTHER — 4%

BIKING — 2% / 5%

TRANSIT — 10% / 11%

DRIVING ALONE — 73%

MODEL RESULTS

SURVEY RESULTS

Transit Priority Areas

One half mile of a major transit stop that is existing or planned…

Zero Waste

35%

2018 **Climate Action Plan** Annual Report

sd sustainability

For the third consecutive year, the City of San Diego is ahead of schedule in reaching its goal of cutting 2010 levels of greenhouse gas (GHG) emissions in half by 2035. While we continue to see progress through lowered GHG amounts, we still have a lot of work to do to reach our ultimate goals.

GOAL

Reduce 2010 baseline GHG emissions (12.9 million metric tons of CO_2e) **50%** by 2035

STATUS

- 21% (2018)
- 15% (2020 goal)
- 40% (2030 goal)
- 0% (Baseline)
- 50% (2035 goal)
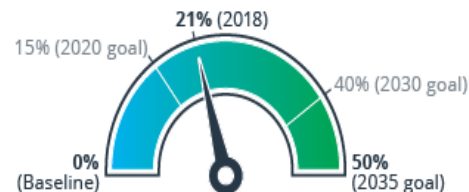
MONITORING MEASURES

JOB CREATION
13% job growth in sustainability-related fields

SOCIAL EQUITY
$1,140,091 community development block grant funds allocated

STRATEGY UPDATES

ENERGY AND WATER EFFICIENCY

11% reduction in residential energy use
3% reduction in municipal energy use
112 gallons per capita per day (GPCD) in water use

CLEAN AND RENEWABLE ENERGY

45% renewable energy on the grid
90 electric and **42** hybrid vehicles in City fleet
25 (18%) waste collection trucks on low-emissions fuel

ZERO WASTE

66% total solid waste diverted
74% landfill gases captured
98% methane captured and used from wastewater

BIKING, WALKING, TRANSIT AND LAND USE*

8% commuter transit modeshare
3% pedestrian commuter modeshare
2% bicyclist commuter modeshare
20 miles per day commute distance

RESILIENCY

13% current urban tree canopy cover
307 trees planted

31 miles of bike lanes added or improved

6,800 linear feet of sidewalk constructed

The City of San Diego municipal operations generated **167,000 MWh** of renewable energy, equivalent to annual electricity use for **18,628 homes.**

San Diegans saved **117,112 MWh** through energy efficiency measures. This diverted over **220 million pounds of carbon dioxide** from being produced, the equivalent of removing **21,400 cars** from the road

307 trees planted and **17,212 trees** maintained/trimmed

72% of diesel used in the City fleet is renewable diesel, avoiding **16,000 tons** of CO_2e emissions

View the full report

sandiego.gov/sustainability

*See the 2018 CAP Annual Report for further information

Climate Adaptation and Resiliency

To address potential impacts to our city and infrastructure from a changing climate, the City of San Diego is developing a plan to ensure we are prepared and resilient. This plan is being developed with over $500,000 in grant funding awarded to the City of San Diego from Caltrans, the State Coastal Conservancy and the California Coastal Commission.

SD sustain**ability**

ASSESSMENT

Anticipate climate change impacts on San Diego's landscape, and infrastructure

Where are the risks, how can we adapt and what are the highest priorities?

STRATEGY DEVELOPMENT

Leverage a wide range of civic and community experts to help adapt and defend against possible risks

What will work best for our people, economy and environment?

ENGAGEMENT & TOOLBOX

Share our knowledge to empower communities of climate risk

Have we ensured equality in the decision-making process and real solutions for the future?

drought · extreme heat · public health · wildlife · air quality · flooding · sea level rise · wildfires

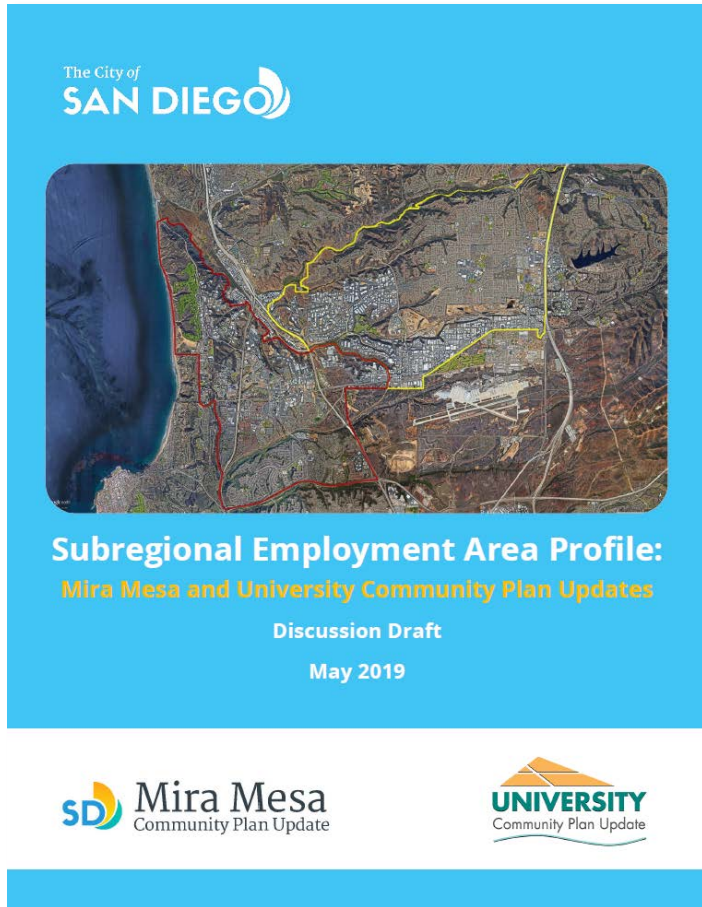# Sustainability for All

www.sandiego.gov/sustainability

Cody Hooven
Director/Chief Sustainability Officer
Sustainability Department

ITEM 3

SUBREGIONAL EMPLOYMENT AREA PROFILE
MARKET DEMAND ANALYSIS
COLLOCATION EVALUATION

The purpose of the Subregional Employment Area Profile for the Mira Mesa and University Community Plan Updates is to:

- Share preliminary information on the current dynamics of the largest employment cluster in the region;

- Explore land use, employment, transportation, and commuter travel patterns; and

- Provide high-level data on trends, challenges, and opportunities to facilitate informed discussion.

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Fall 2019

- Joint initiative between University and Mira Mesa CPUs

- Convene business associations, large employers, major property owners, developers, and community members

- Present result of technical studies, stakeholder interviews, and market demand forecast
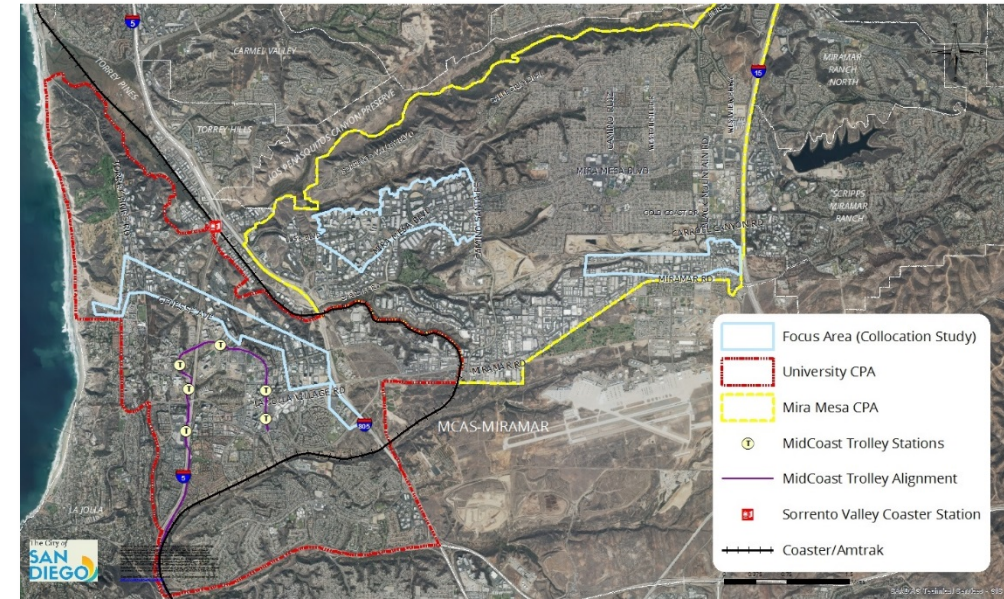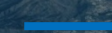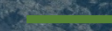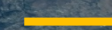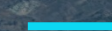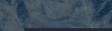
Regional Context

High-Tech, Biotech, Health Care Hub:
166,000+ jobs
24% of City Jobs

Sorrento Valley Coaster Station
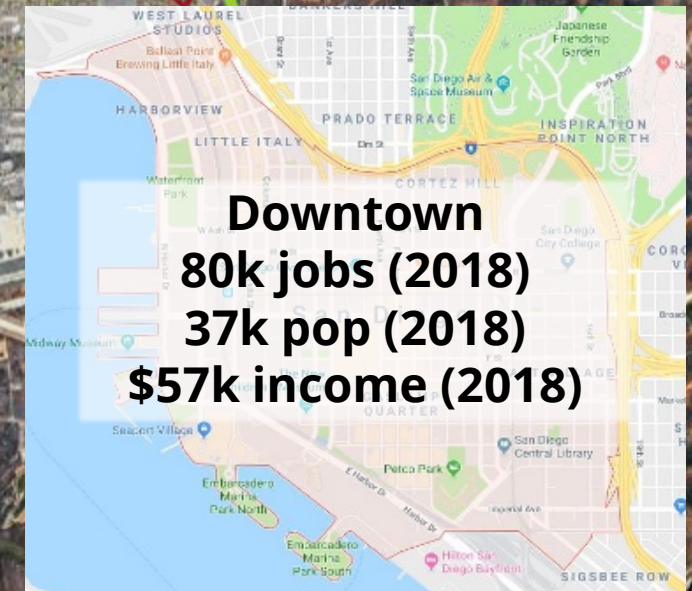
Mira Mesa
83k jobs (2016)
80k pop (2018)
$94k income (2016)

University
77k jobs (2015)
68k pop (2018)
$75k income (2018)

6k jobs

Sorrento Valley

UCSD
25k jobs
38k students

Mid-Coast Trolley Extension
(Under Construction)
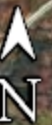
Coaster/Amtrak

Downtown
80k jobs (2018)
37k pop (2018)
$57k income (2018)

Google earth

Land Use and Employment Context

3 mi

N

EMPLOYMENT MIX

- Public Administration and Other Services
- Health Care and Social Assistance
- Educational Services
- Admin & Support, Waste Mgmt, & Remediation
- Professional, Scientific, Tech, and Mgmt Services
- Finance, Real Estate and Insurance
- Retail, Arts, Entertainment, Accommodation, and Food Services
- Wholesale, Transportation and Warehousing
- Manufacturing and Extraction
- Construction and Utilities

Percent Total Jobs chart — University:
- 2% Public Administration and Other Services
- 14% Health Care and Social Assistance
- 23% Educational Services
- 5% Admin & Support, Waste Mgmt, & Remediation
- 24% Professional, Scientific, Tech, and Mgmt Services
- 13% Finance, Real Estate and Insurance
- 10% Retail, Arts, Entertainment, Accommodation, and Food Services
- 4% Wholesale, Transportation and Warehousing
- 2% Manufacturing and Extraction
- 3% Construction and Utilities

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Public Administration and Other Services

Health Care and Social Assistance

2 **Educational Services**

Admin & Support, Waste Mgmt, & Remediation

1 Professional, Scientific, Tech, and Mgmt Services

Finance, Real Estate and Insurance

Retail, Arts, Entertainment, Accommodation, and Food Services

Wholesale, Transportation and Warehousing
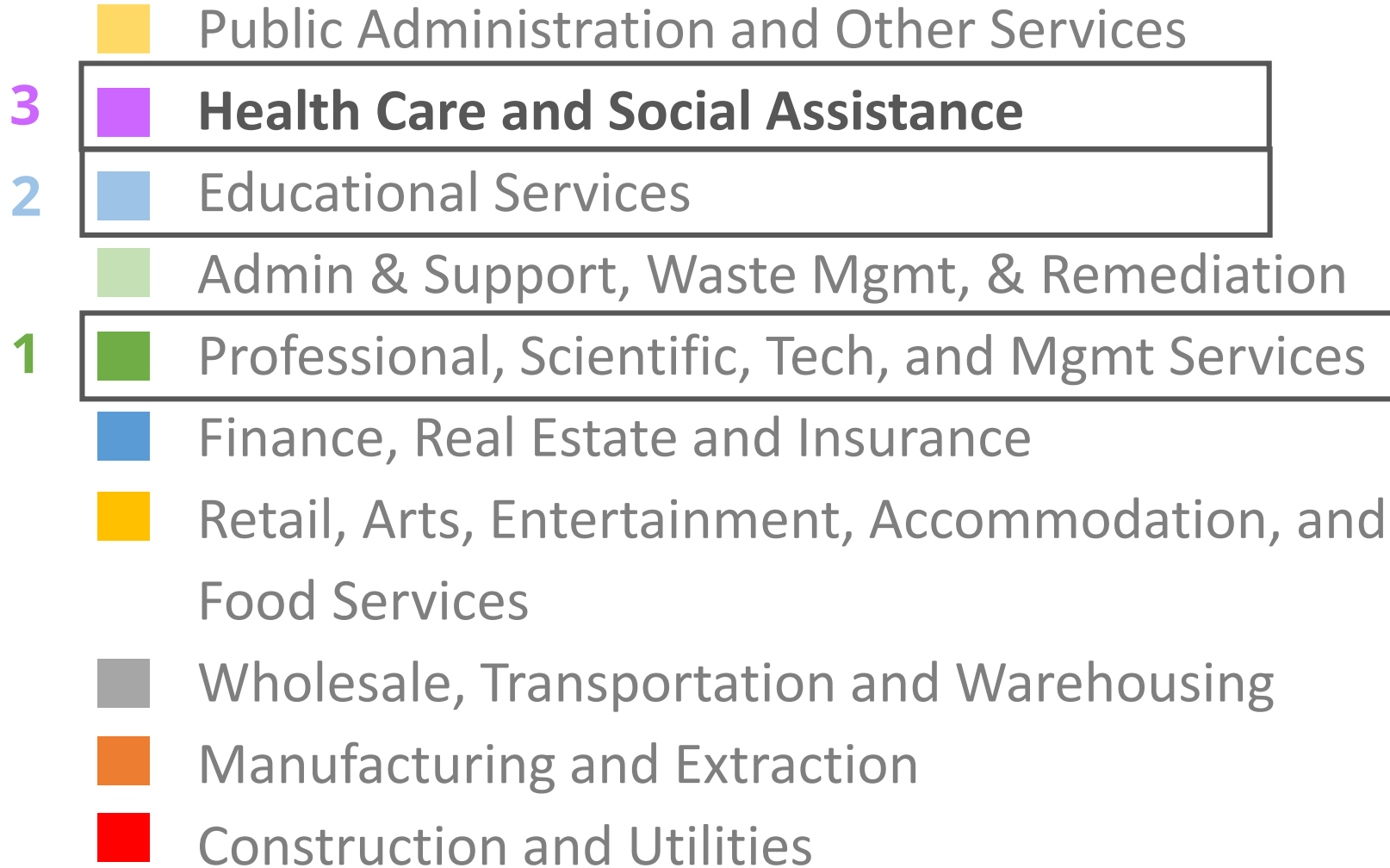
Manufacturing and Extraction

Construction and Utilities

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	🟨	Public Administration and Other Services
3	🟪	**Health Care and Social Assistance**
2	🟦	Educational Services
	🟩	Admin & Support, Waste Mgmt, & Remediation
1	🟩	Professional, Scientific, Tech, and Mgmt Services
	🟦	Finance, Real Estate and Insurance
	🟧	Retail, Arts, Entertainment, Accommodation, and Food Services
	⬜	Wholesale, Transportation and Warehousing
	🟧	Manufacturing and Extraction
	🟥	Construction and Utilities

Percent Total Jobs — University

- 2%
- 14%
- 23%
- 5%
- 24%
- 13%
- 10%
- 4%
- 2%
- 3%

UNIVERSITY COMMUNITY PLAN UPDATE
MARKET DEMAND ANALYSIS

KEYSER MARSTON ASSOCIATES™

May 21, 2019

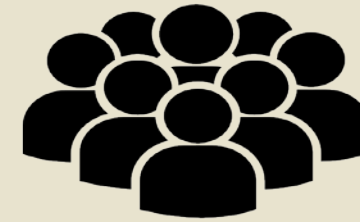**Prepared for: City of San Diego**

DEMOGRAPHIC AND ECONOMIC TRENDS

DEMOGRAPHIC OVERVIEW

2019	University Community Plan Area (CPA)	City of San Diego	County of San Diego
Population	69,830	1,414,461	3,371,481
Households	27,501	523,755	1,180,609
Average Household Size	2.21	2.60	2.77
Median Age	29.92	36.1	36.5
Median Household Income	$82,521	$80,424	$78,294

Refer to Table A-1

KEYSER MARSTON ASSOCIATES.

Population Growth Rate

Average Annual Growth Rate	University CPA	City of San Diego	County of San Diego
1980-2016	2.5%	1.3%	1.6%

POPULATION GROWTH TRENDS

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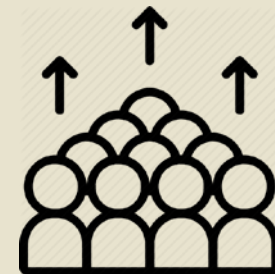
MARKET FACTORS EMPLOYMENT USES

4th Quarter 2018	INDUSTRIAL		RESEARCH AND DEVELOPMENT		OFFICE	
	Central Submarket	San Diego County	Central Submarket	San Diego County	North City Submarket	San Diego County
Rentable SF	40.5 M	144.2 M	26.7 M	48.6 M	25.9 M	103.6 M
Vacancy	2.60%	4.34%	7.61%	6.51%	9.75%	10.58%
Average Asking Lease Rate (/SF/Month)	$1.21	$1.00	$2.39	$1.58	$2.80	$2.78

M = Million
SF = Square Feet

Refer to Table A-7, A-8, A-9

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35

HISTORIC MARKET FACTORS EMPLOYMENT USES

	2004	2018	2004-2018
	Occupied SF (1)	Occupied SF (1)	**Average Annual Change in Occupied SF**
University CPA (2)	11.5 M	17.2 M	460,000 SF/Year
San Diego County	225.2 M	276.0 M	3.6 M SF/Year

(1) Includes Office, Industrial, and Research and Development Uses.
(2) Includes Torrey Pines/Sorrento Valley, UTC, and Governor Park submarkets as categorized by Voit Real Estate Services.

Refer to Table A-10

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EMPLOYMENT TRENDS

Industry Sector	Average Annual Rate Increase, San Diego County	
	2000-2010	**2010-2017**
Retail Trade	-0.3%	1.9%
Professional and Business Services	0.2%	2.0%
Education and Health Services	3.2%	3.2%
Finance, Insurance, and Information	-1.5%	0.9%
Leisure and Hospitality	1.8%	3.5%
Transportation, Warehousing, and Wholesale	-0.2%	2.2%
Manufacturing	-2.3%	1.9%
Construction	-2.3%	5.3%
Natural Resources and Mining	2.9%	-4.0%
Other Services	0.9%	2.5%
Total Employment	**0.2%**	**2.5%**

Refer to Table A-3

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KEY INDUSTRIES IN UNIVERSITY
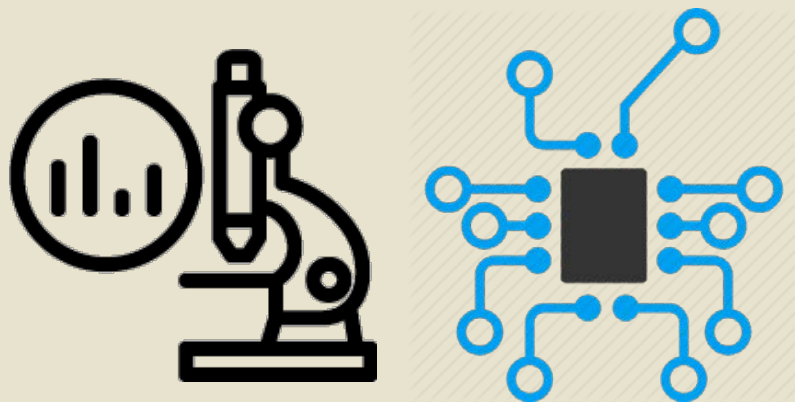
- Computer & Electronic Product Manufacturing
- Retail Trade
- Information/Software Publishers
- Professional, Scientific & Technical Services
- Scientific Research and Development Services
- Health Care & Social Assistance

MARKET FACTORS: RETAIL USES
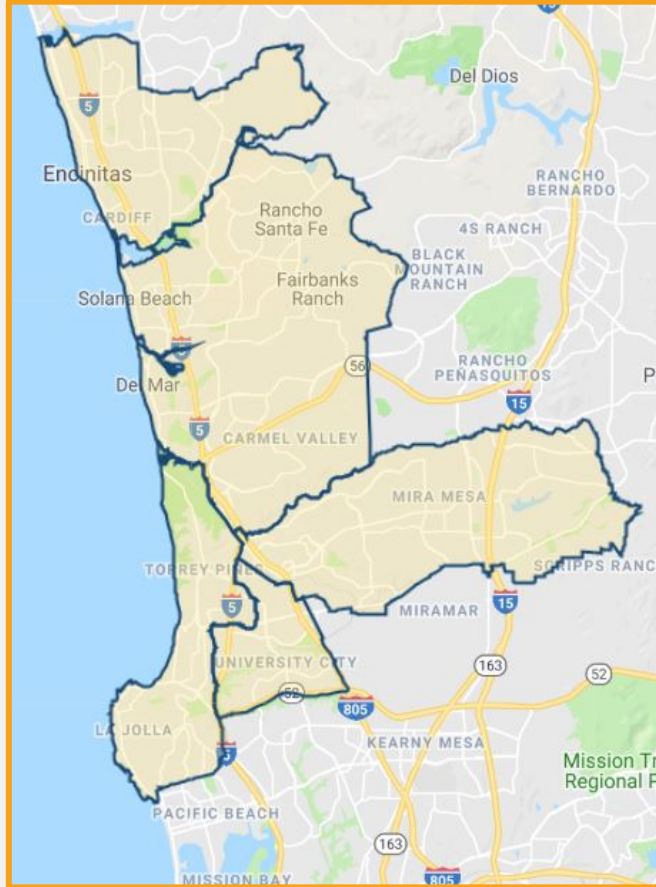
4th Quarter 2018	Central North Submarket [1]	San Diego County
Rentable SF	17.4 M	140.3 M
Vacancy	5.43%	3.83%
Average Asking Lease Rate (/SF/Month)	$2.84	$2.03

(1) Includes Cardiff/Encinitas, Del Mar Heights, La Jolla/Torrey Pines, Miramar, and UTC

Refer to Table A-6

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ESTIMATED GROSS RETAIL SALES

	City of San Diego		County of San Diego	
Per Capita Income	$39,033		$36,291	
	Per Capita	% of Per Capita Income	Per Capita	% of Per Capita Income
General/Apparel/Furnishings/Other	$5,081	13.0%	$5,285	14.6%
Convenience Goods	$5,014	12.8%	$4,201	11.6%
Heavy Commercial Goods	$711	1.8%	$822	2.3%
Total Gross Retail (1)	**$10,805**	**27.7%**	**$10,308**	**28.4%**

(1) Based on most recent data provided by the State of California Board of Equalization, calendar year 2016.

Refer to Table A-5

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MARKET DEMAND ANALYSIS

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MARKET DEMAND ANALYSIS: OBJECTIVE
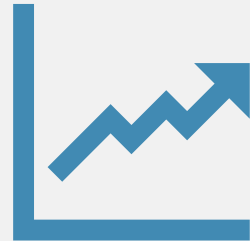
Evaluate current and anticipated market trends

Assess the development potential for retail and employment uses within the University CPA

EMPLOYMENT DEMAND

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STEPS FOR PROJECTING EMPLOYMENT DEMAND

1) Determine the number of employees by industry within the CPA

2) Apply low/high annual growth rates to each industry until Year 2050

3) Assume percentage of employees likely to use office, industrial, and research & development space

4) Apply a SF per employee factor to determine total employment demand from 2019 to 2050

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EMPLOYMENT DEMAND PROJECTION, 2019-2050

University CPA	Low	High
Existing Employees (2015)	76,953	
Average Annual Rate of Increase thru 2050	2.1%	3.0%
Number of New Industrial/Office Employees	27,000	44,000
Total Employment Demand, 2019-2050	**8.40 M SF**	**13.60 M SF**

Refer to Tables B-1 and B-2

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RETAIL DEMAND

KEYSER MARSTON ASSOCIATES.

STEPS FOR PROJECTING RETAIL DEMAND

1. *Estimate potential recapture of existing retail sales export (where resident expenditures is higher than actual sales capture) within the retail trade area of the CPA*

2. *Estimate retail demand by new residents within the CPA*

3. *Estimate retail demand by new employees within the CPA*

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RETAIL SALES EXPORT RECAPTURE POTENTIAL
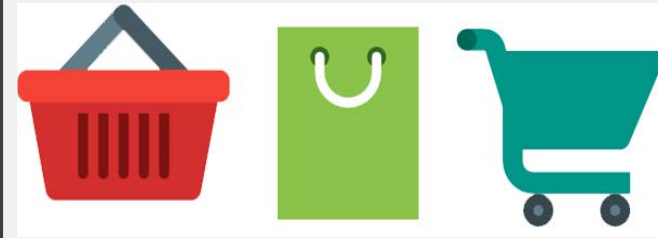
University CPA – 4.0-Mile Trade Ring	2018 Estimated Sales Export	Potential Recapture of Retail Space (SF), 2019-2050	
		Low	**High**
General Merchandise Stores	($100.2) M	86,000	115,000
Building Materials, Garden Equipment & Supply Store	($11.5) M	3,000	4,000
Food & Beverage Stores	($60.5) M	27,000	40,000
Total	**($172.2) M**	**116,000**	**159,000**

Refer to Table B-6

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RETAIL SPACE DEMAND BY NEW RESIDENTS, 2019-2050

University CPA	Low	High
Total Annual Aggregate Income (1)	$923.8 M	$1.9 B
Aggregate Income Spent on Retail Expenditures	25%	30%
Spending Captured in University	45%	50%
Estimated Sales per SF per Year	$450/SF	$450/SF
Estimated Retail Space Supported by New Households, 2019-2050	**231,000 SF**	**626,000 SF**

(1) Estimated based on historic population growth household income required for purchasing a home. Does not take into account development capacity of available land inventory.

Refer to Tables B-7 through B-10

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RETAIL SPACE DEMAND FROM NEW EMPLOYEES, 2019-2050

University CPA	Low	High
Total New Employees	27,000 Employees	44,000 Employees
Estimated Employee Retail Expenditures Per Year	$6,990	$6,990
Total Annual Retail Expenditures by New Employees	$188.5 M	$306.1 M
Capture in University	50%	60%
Estimated Sales Per SF per Year	$500/SF	$500/SF
Total Retail Space Demand from New Employees, 2019-2050	**188,000 SF**	**367,000 SF**

Refer to Tables B-11 and B12

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ESTIMATED RETAIL SPACE DEMAND, 2019-2050

University CPA	Low	High
Recapture of Retail Sales Export	116,000 SF	159,000 SF
Demand from New Residents	231,000 SF	626,000 SF
Demand from New Employees	188,000 SF	367,000 SF
Demand from Beyond Trade Ring	<u>54,000</u> SF	<u>115,000</u> SF
Total Estimated Retail Space Demand, 2019-2050	**590,000 SF**	**1.27 M SF**

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TOTAL NON-RESIDENTIAL PROJECTED DEMAND, 2019-2050

University CPA	Low	High
Employment Use SF Per Year	**8.40 M SF** 271,000 SF/Year	**13.60 M SF** 439,000 SF/Year
Retail SF Per Year	**590,000 SF** 19,000 SF/Year	**1.27 M SF** 41,000 SF/Year

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SURPLUS/(DEFICIT) OF REMAINING DEVELOPMENT CAPACITY, 2019-2050

University CPA	KMA Demand Projection, 2019-2050		Existing Plan at Build-Out (1)	Surplus/(Deficit)	
	Low	High	Remaining Development Capacity	Low	High
Employment Use	8.40 M SF	13.60 M SF	8.30 M SF	100,000 SF	(5.3) M SF
Retail	590,000 SF	1.27 M SF	1.66 M SF	1.07 M SF	390,000 SF

(1) Estimated by City based on SANDAG data for the existing adopted community plan.

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EVALUATION OF POTENTIAL COLLOCATION

KEYSER MARSTON ASSOCIATES

EVALUATION OF POTENTIAL COLLOCATION: OBJECTIVE

- Evaluate the market support for collocation between industrial and residential mixed-use development in the University Collocation Area
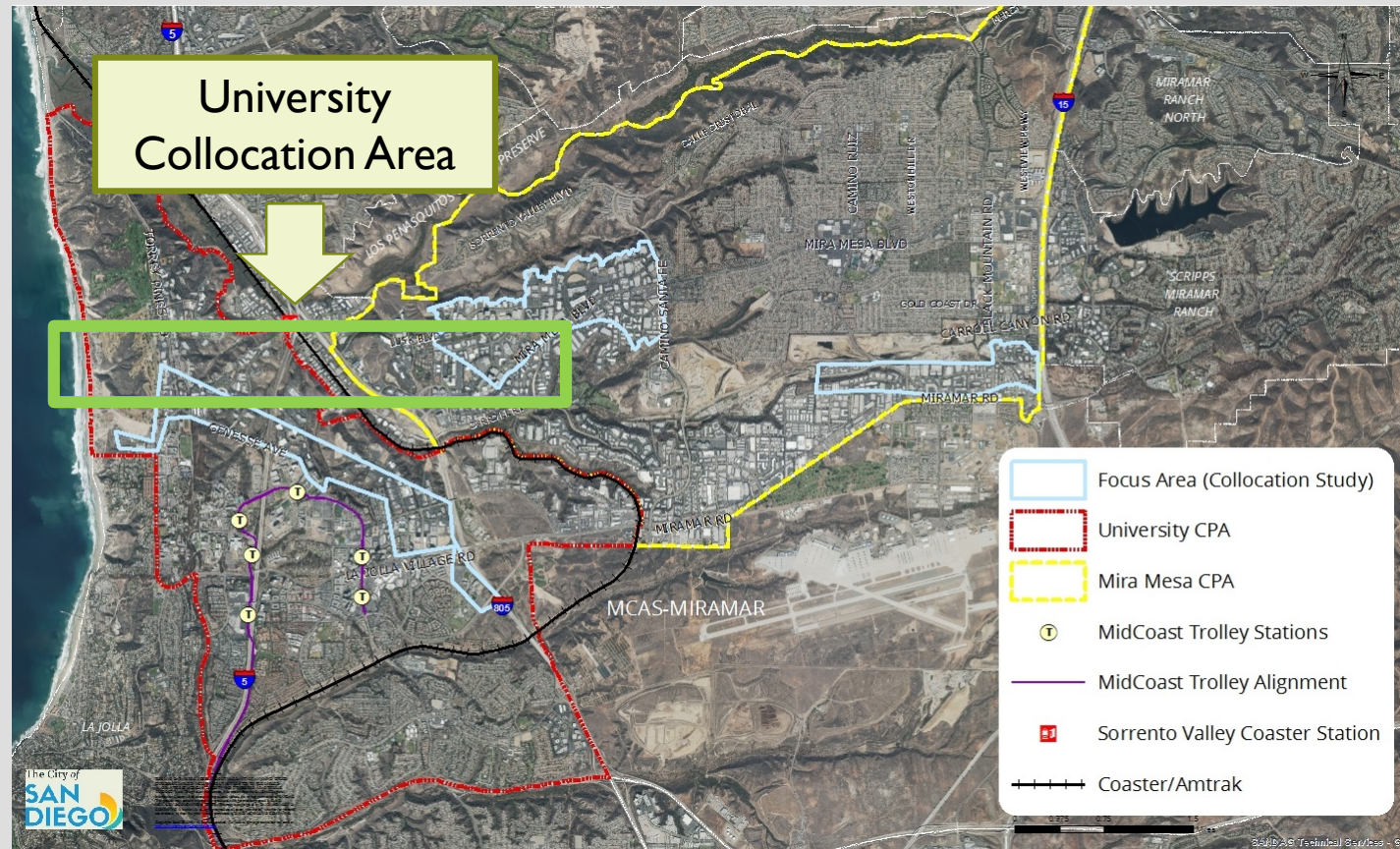
COLLOCATION CASE STUDIES

Case Study	Region/City	Goal/Objective
East Otay Mesa Business Park Specific Plan Amendment	County of San Diego	*Providing a Mixed-Use Village Core w/ residential uses + light industrial/ technology, office, and commercial uses*
North San Jose Area Development Policy	City of San Jose	*Create a key employment area and an excellent place where work, home, and community are fully integrated*
Industrial/Commercial-Residential Mixed-Use	City of Glendale	*Encourage a mix of commercial, industrial, and residential activities located along portions of industrial/commercial thoroughfares*
Industrial Mixed-Use District	City of Atlanta, GA	*Create quality of life districts to accommodate residential/non-residential growth without losing land zoned for industrial uses*

KEYSER MARSTON ASSOCIATES.
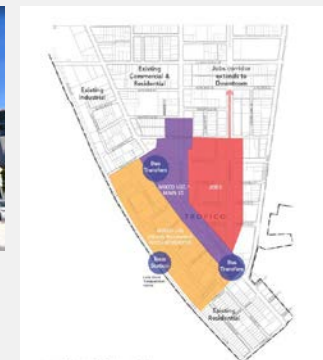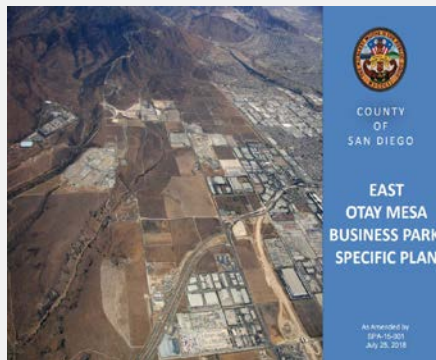
COLLOCATION SWOT ANALYSIS

Strengths	Weaknesses
• Mix of heavy and light industrial uses • Proximity to freeway • Existing high-quality employment • Proximity to planned mixed-use development • Existing Transit Priority Area (TPA) • Adjacency to existing residential amenities • Actively involved business community	• Presence of heavy industrial uses • Auto-oriented community with heavy traffic • Existing superblock street grids and wide thoroughfares
Opportunities	**Threats**
• Provide employee housing in proximity to employers • Encourage the use of planned transit infrastructure • Attract younger employees who seek live/work/play environment • Include key stakeholders in drafting of legal covenants, deed restrictions, etc. to reduce future land use conflicts	• Potential land use conflicts (e.g., noise, traffic, hazardous materials, pollution) • Can be viewed as a threat to heavy industrial uses • Potential loss of land supply for prime industrial uses

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FACTORS FOR SUCCESSFUL COLLOCATION

	University Collocation Area
Less than 60% of the land area is designated as prime industrial	**Yes**
Existing presence of non-prime Industrial uses	**Somewhat**
Close proximity to existing or planned transit	**Somewhat**
Potential for small blocks to encourage walkability	**Somewhat**
Close proximity to good schools	**Yes**
Close proximity to open space	**Yes**
Close proximity to amenities/CPA retail core	**Yes**
Potential to capture employee housing demand	**Yes**

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MARKET SUPPORT FOR MULTI-FAMILY AND/OR MIXED-USE IN COLLOCATION FOCUS AREA

	Near-Term (0 to 5 years)	Mid-Term (5 to 10 years)	Long-Term (10+ years)
University Collocation Area	Moderate	Strong	Strong

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UNIVERSITY COMMUNITY PLAN UPDATE
MARKET DEMAND ANALYSIS

KEYSER MARSTON ASSOCIATES™

May 21, 2019

Prepared for: City of San Diego

~ 70 **Participants**

March 2019

University City High School

The March subcommittee meeting offered community members an opportunity to **provide input on**:

- **their priorities**,
- **the development of a draft vision; and**
- **guiding principles.**

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Community Plan Update
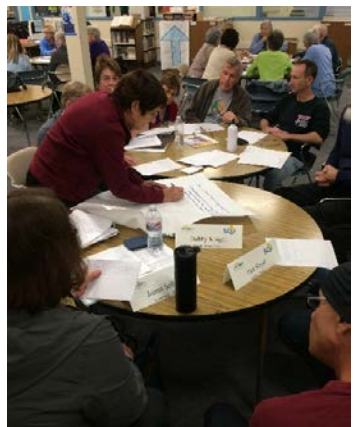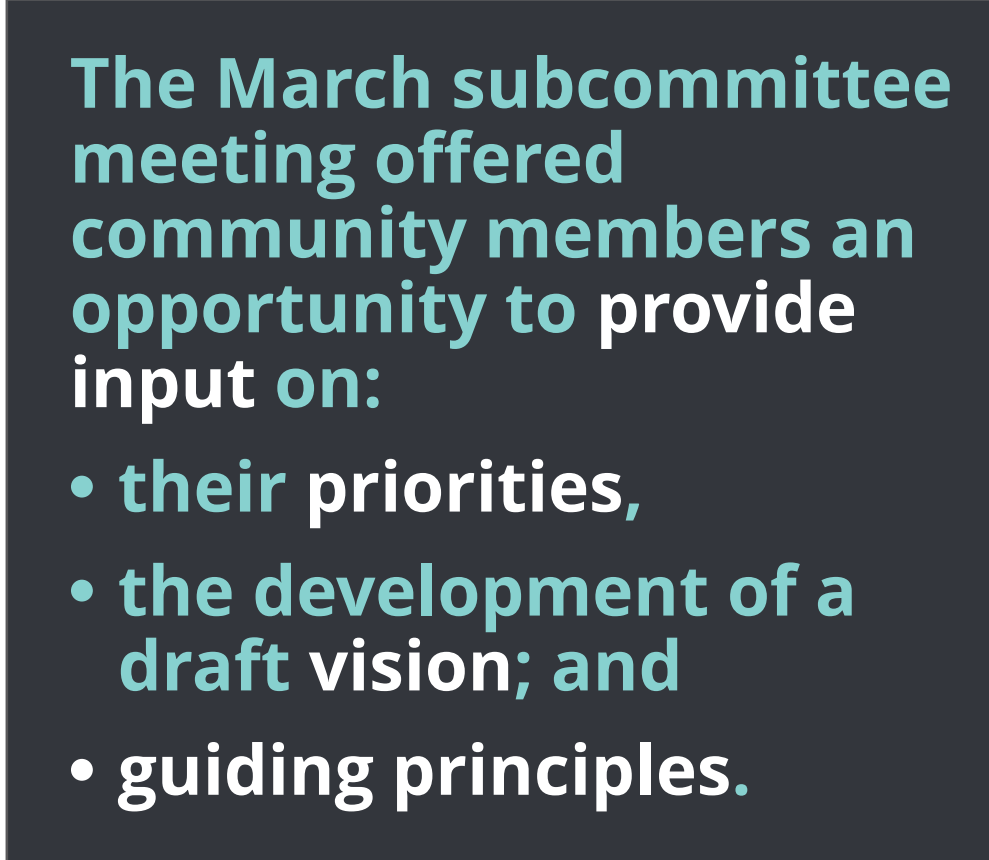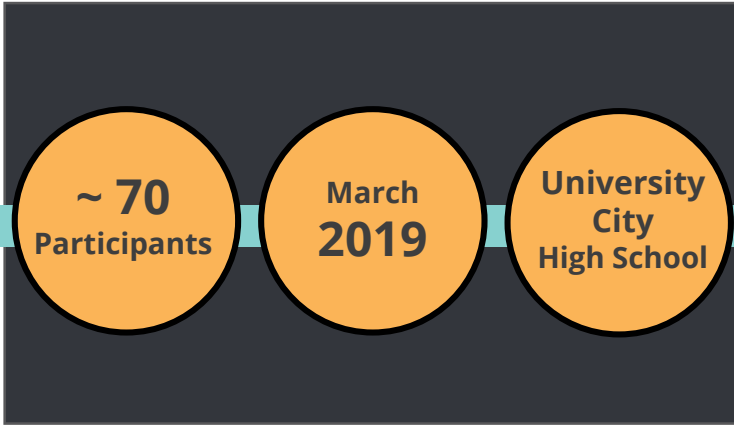
Participants were asked to identify their top priorities in the following categories:

Land Use & Housing
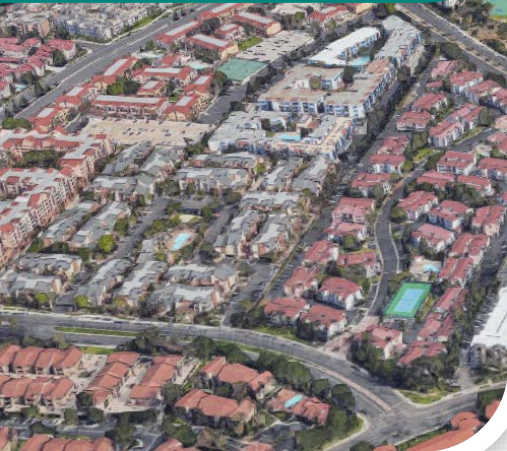
Mobility

Open Space & Amenities

Sustainability
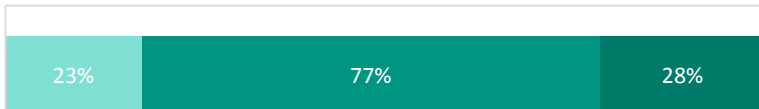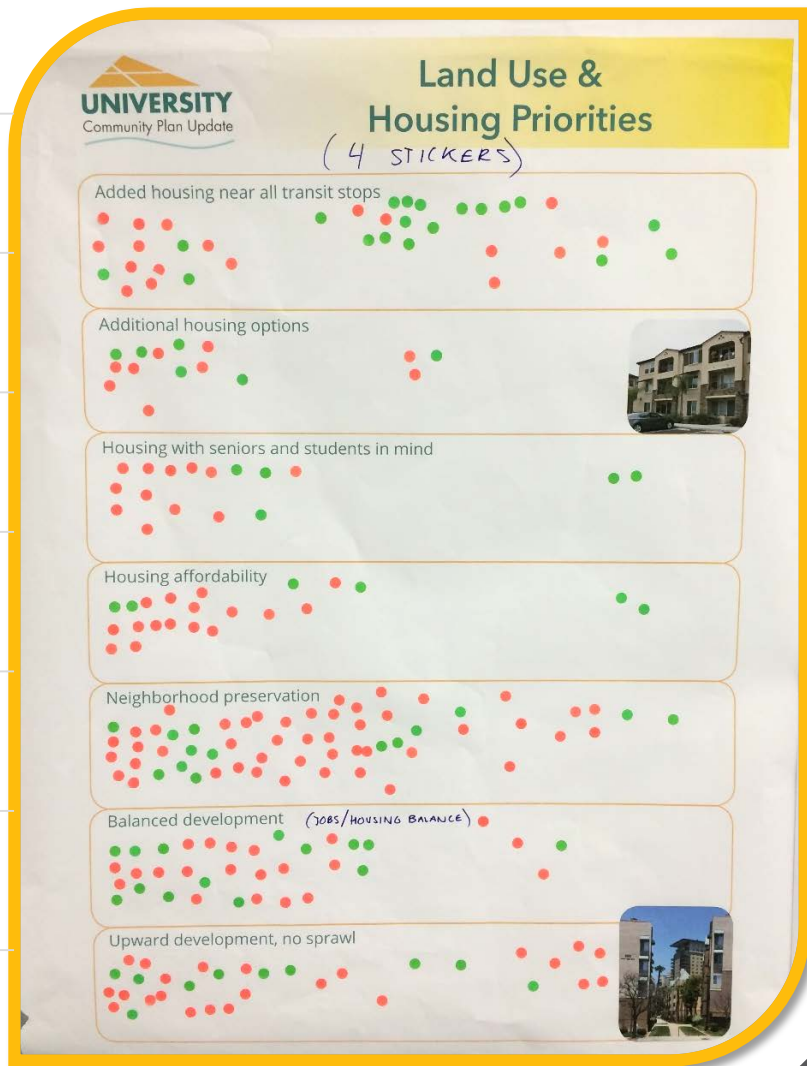
MOBILITY PRIORITIES

SUBCOMMITTEE | COMMUNITY | ALL

FEATURES THAT MITIGATE SPEED, TRAFFIC, AND CONGESTION — 29% | 71% | 26%
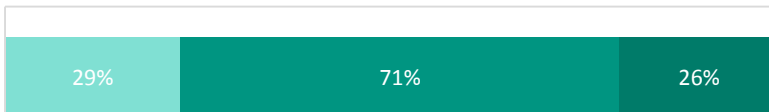
HIGH-QUALITY PEDESTRIAN CROSSWALK — 21% | 79% | 20%
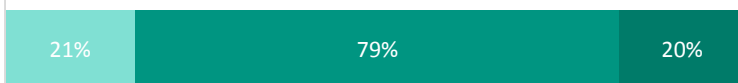
CYCLING FACILITIES — 60% | 40% | 19%

MORE TRANSIT OPTIONS — 31% | 69% | 16%

BUS SERVICE/STATION IMPROVEMENTS — 41% | 59% | 10%

CONNECTED PARKS — 18% | 82% | 7%
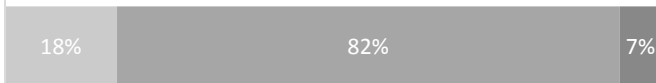
ADDED BY COMMUNITY: LAST MILE — 100% | 0%
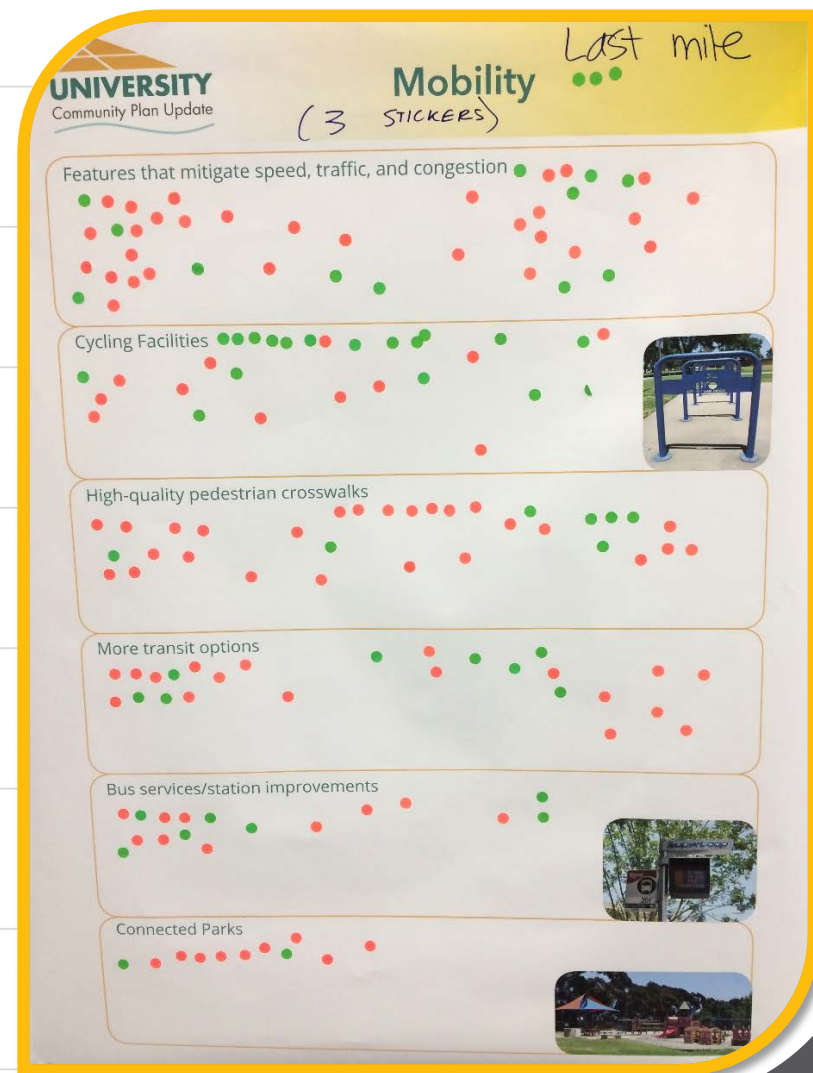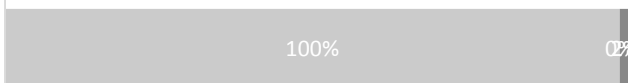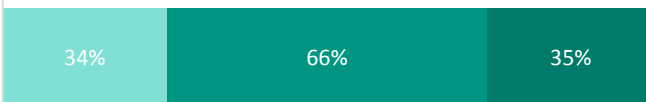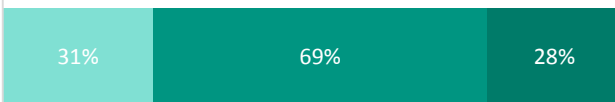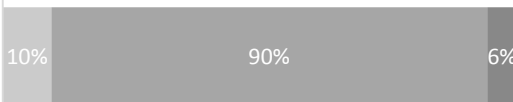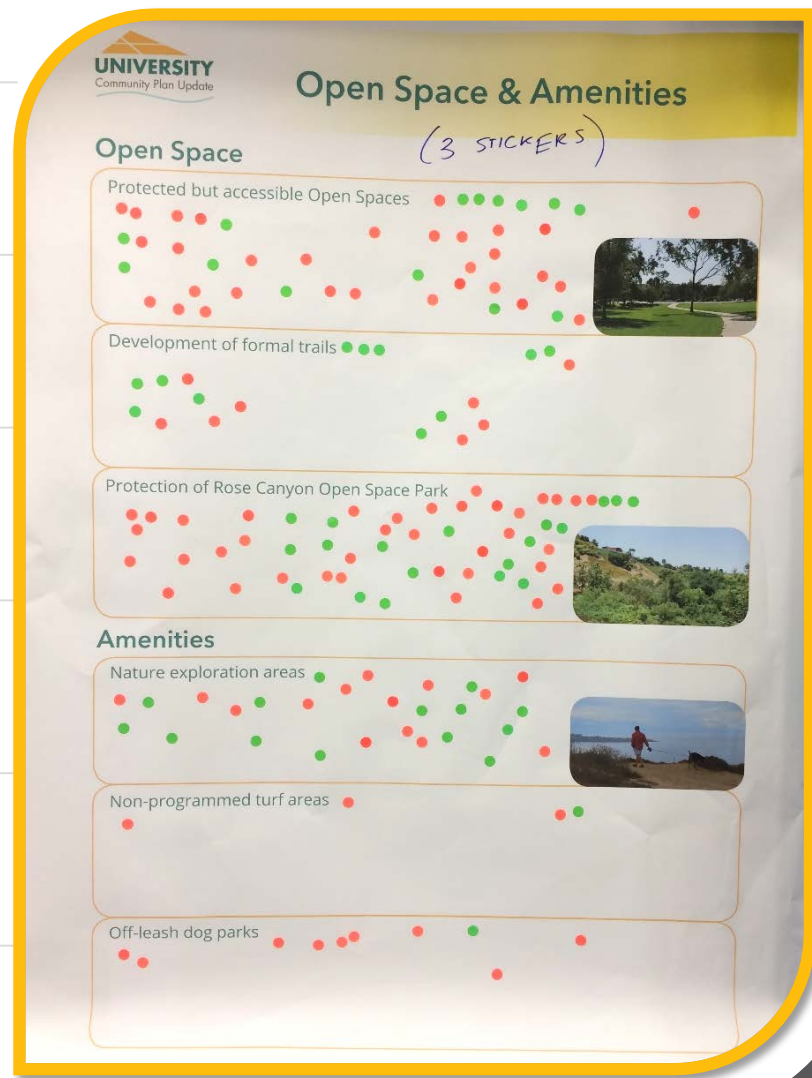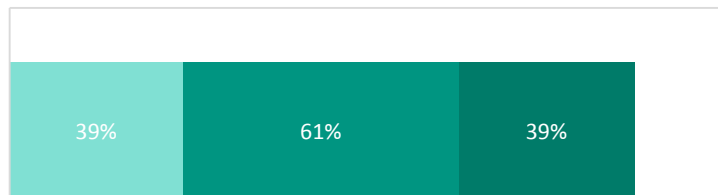
SUSTAINABILITY PRIORITIES

SUBCOMMITTEE | COMMUNITY | ALL

MORE WALKABLE AND BIKEABLE
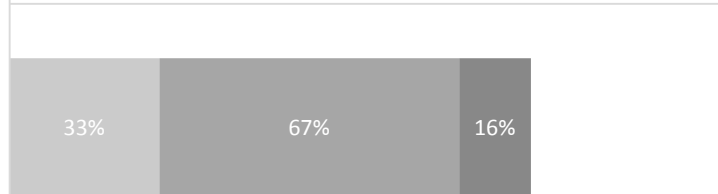| 39% | 61% | 39% |

GROWING SUSTAINABLY
| 34% | 66% | 28% |
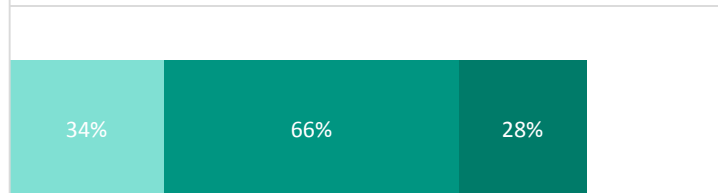
THOUGHTFULLY EMBRACING NATURAL AMENITIES
| 26% | 74% | 17% |
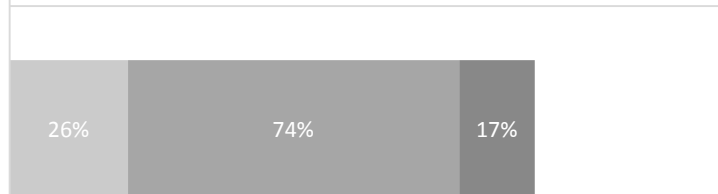
CREATING A SENSE OF COMMUNITY
| 33% | 67% | 16% |

Participants broke up into **eighth small groups**, and through thoughtful discussions each group **provided a possible vision** and **guiding principles** to inform their development.

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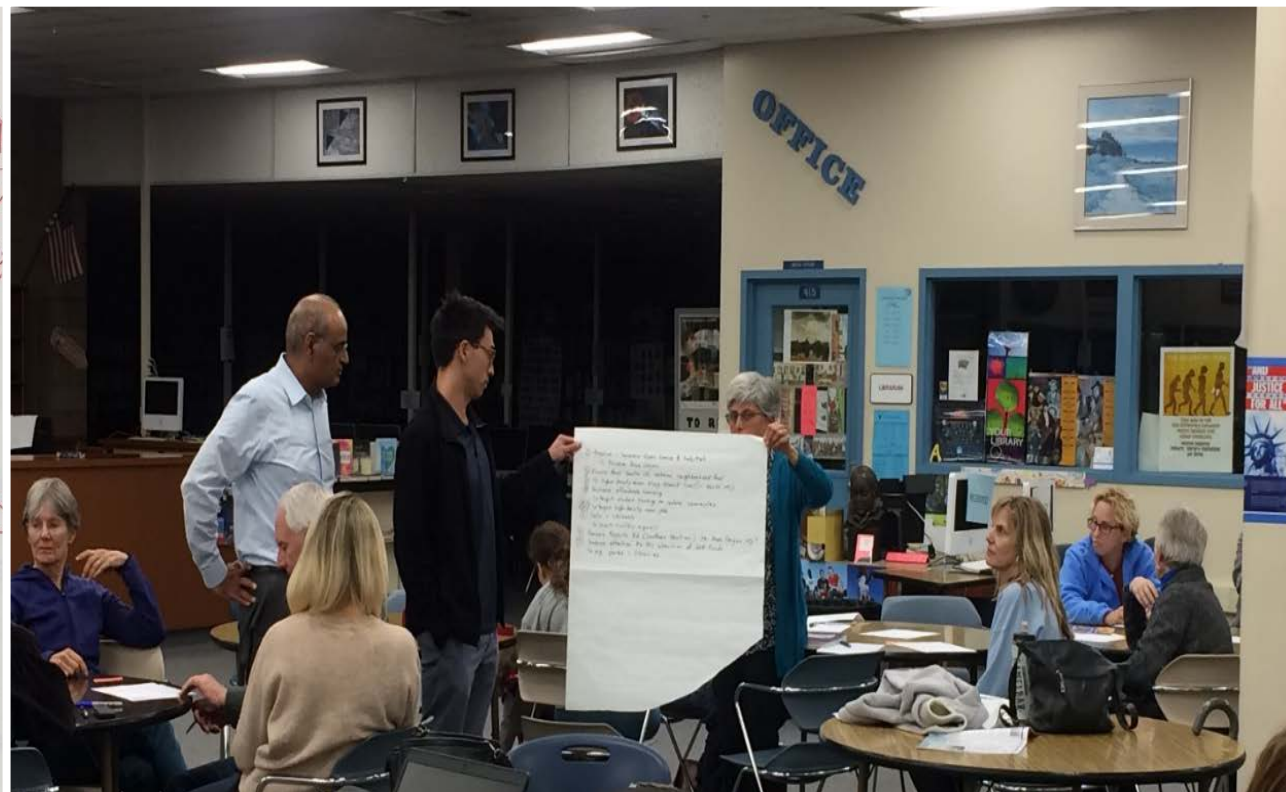
A community with renowned higher education, healthcare, scientific research and technology institutions and businesses connected through a robust multi-modal network to a vibrant mixed-use urban core and surrounding residential neighborhoods, which protects the natural habitat and canyon systems.

VISION ST

FUTURE ST
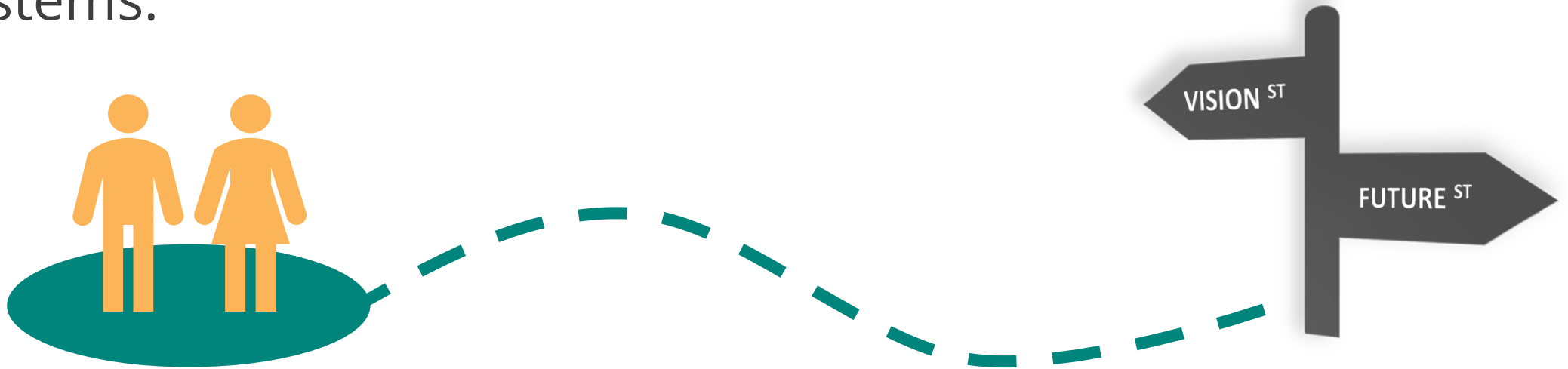
Renowned Institutions. The development of institutions that provide world leading research, higher education and healthcare which contribute to the built environment and support the economic growth and attractiveness of the community.

A Vibrant Mixed-Use Urban Core. A land use pattern that focuses growth into a vibrant urban core which contains regional transit connections and a distinct range of uses, character, streetscapes, places, urban form and building design positions the community as a leader in sustainability.

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A Diversified Housing Inventory. A housing inventory that contains a broad range of housing types and costs to accommodate a variety of age groups, household sizes and compositions, tenure patterns and income levels.

A Center of Economic Activity. An employment center with scientific research, technology and office uses that provide jobs in proximity to residential, retail and visitor serving uses connected by transit that supports the economic viability and attractiveness of the community.

A Complete Mobility System. A mobility system that provides multi-modal options for people to travel within the community and the region, enhancing economic growth, livability and sustainability.

A Place Connected to its Regional Recreational and Open Space Areas. The establishment of a high-quality natural trail system and accessible connections to Torrey Pines State Reserve, Rose Canyon Open Space Park, San Clemente Canyon and other primary canyon and open space areas within the community will enhance quality of life for both residents and visitors while protecting critical natural habitat.

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