

Monterey County Comprehensive Economic Development Strategy

Adopted
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Planning Organization

Planning for the Monterey County Comprehensive Economic Development Strategy (CEDS) is under the purview of the Monterey County Board of Supervisors. The County Board of Supervisors appoints the County's Economic Development Committee, which for purposes of the CEDS is filling the role of the Strategy Committee. The County's Economic Development Department is responsible for conducting the necessary research, staffing the Strategy Committee and ongoing implementation and reporting on the CEDS.

Strategy Committee

The County Board of Supervisors established the Economic Opportunity Committee to coordinate economic development activities in Monterey County. The Committee is composed of thirteen members representing the following organizations or economic sectors:

- 2 – Agriculture
- 1 - Education
- 1 - Finance
- 1 - Healthcare
- 1 - Labor
- 2 – Local government (members of the Board of Supervisors)
- 1 - Micro or Small Business Owner
- 2 – Research & Development
- 1 – Tourism
- 1 - Workforce Investment Board

Concurrent to establishing the Economic Opportunity Committee and before the County began the process of writing a new CEDS; the County retained SRI International to conduct an in-depth analysis of economic opportunities in Monterey County. This CEDS draws heavily from the work done by SRI. The Economic Development Committee, SRI International Studies and CEDS should advance the goals of:

1. Reinforcing existing economic pillars
2. Pursuing equitable and sustainable opportunities
3. Promoting emerging, high-wage sectors

Qualification for EDA Economic Distress

Potential grant applicants need to qualify based on at least one of three criteria established in the Public Works Act funding EDA. These criteria are:

1. An unemployment rate that is, for the most recent 24-month period for which the data are available, at least one percentage point greater than the national average unemployment rate;
2. Per capita income, that is for the most recent period for which data are available, 80% or less than the national per capita income; or
3. “Special Need”, e.g. plant closures

Monterey County qualifies for assistance for an unemployment rate that is more than 1% higher than the national average. During 2012 and 2013, the national unemployment rate averaged 7.7%. Monterey County’s unemployment during the same period averaged 10.4%.

Additionally, five cities (Gonzales, Greenfield, King, Salinas, and Soledad) and five Census Designated Places (Castroville, Chualar, Pajaro, San Ardo, and San Lucas) within the County qualify as having per capita incomes that are less than 80% of the national rate. These ten communities are home to more than 54% of the County’s population.

Background

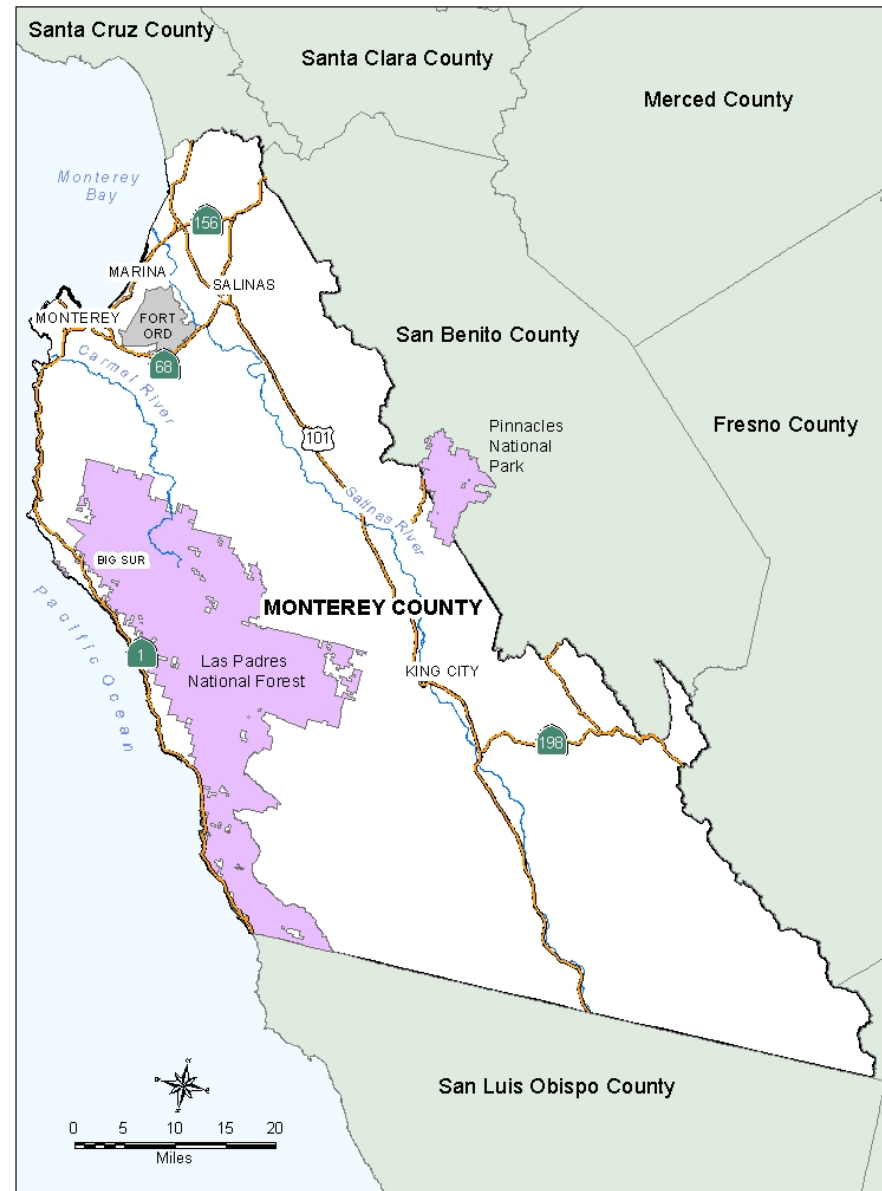
Overview

Monterey County was first colonized by Spanish missionaries with the establishment of Mission San Carlos Borromeo de Carmelo in 1770 near the present day city of Carmel-by-the-Sea. Mission San Carlos Borromeo de Carmelo became the administrative center for the Franciscan monks who established the remaining 19 missions in California. A second mission, Mission San Antonio de Padua, was founded a year later. While Mission San Antonio de Padua is one of the lesser known of California’s missions, it introduced two practices that remain vital to Monterey County’s economy today. First the missionaries introduced irrigated agriculture on the mission grounds. Second, they planted the first grapes in California specifically for the purpose of making wine. Both of these activities continue to play vital roles in Monterey County’s economy today.

Due in part to its proximity to the Carmel Mission and the Monterey Bay, the City of Monterey became the administrative center for Spanish and then Mexican California. Under Spanish and Mexican rule, all ships doing business in California were first required to call in Monterey. The County’s central role in governing the state began to change with the Gold Rush of 1849 as economic and governmental activities moved north toward Sacramento and San Francisco, which afforded much easier access to the goldfields. When California joined the United States in 1850, the City of Monterey hosted the State Constitutional Convention.

While many cities and counties have reinvented themselves economically at the expense of their agricultural heritage, agriculture in Monterey County continually reinvents itself to adapt to changing market opportunities. During the Mexican period and early statehood, agriculture in Monterey County was based on livestock and open grazing lands. As transportation improved and pressure developed for conversion of agricultural property in the greater San Francisco Bay Area, agriculture in Monterey County changed to products with shorter shelf lives (e.g. dairy goods) and other crops that were being displaced. By the late 19th century, Monterey County was a major producer of sugar beets and then, by World War One when the US Army went to war, it was sustained on pinto beans grown in Monterey County. By the 1920's, agriculture in Monterey County was making a major switch from dry farmed field crops to vegetables. Today, vegetables and strawberries dominate the County's agricultural economy. Because the County has remained true to its agricultural roots, much of the County today appears, to the untrained eye, to be open and undeveloped land.

Climactically, demographically, economically and geographically, Monterey County is defined by three prominent features. From east to west these features are the Monterey Bay/Pacific Ocean, Santa Lucia Mountains, and the Gabilan Mountain Range. Throughout this CEDS these regions will be referred to as the Monterey Bay Area and the Salinas Valley. There is a third region that transcends these physical regions in that is defined only because it is outside of any city. Depending on what is being discussed; these unincorporated areas may exhibit characteristics of the Monterey Bay or Salinas Valley. The Monterey Bay area includes the cities of Carmel-by-the-



Sea, Del Rey Oaks, Marina, Monterey, Pacific Grove, Sand City and Seaside and the unincorporated communities of Big Sur and Carmel Valley. The cities of the Salinas Valley include Gonzales, Greenfield, King, Salinas, and Soledad plus the unincorporated communities of Bradley, Castroville, Chualar, Lockwood, Parkfield, San Ardo, and San Lucas.

Economy

The 21st Century economy in Monterey County is built around agriculture, tourism and a growing cluster of higher education and marine research. Monterey County is the fourth largest agricultural, by value, county in California, home to one of the oldest resorts on the west coast, and the oldest golf course and marine research station west of the Mississippi. Each of these industries will be discussed in the following section. What seems to make Monterey County somewhat unique is that each of these industries has long ties to the County and the County has not gone through the process of economic reinvention that many other communities seem to go through when an existing economic engine goes into decline.

Agriculture

In 2013, agriculture was a \$4.379 billion industry and directly accounted for 25% of all employment in Monterey County. There were approximately 1.4 million acres (almost 2,250 square miles) used for agriculture throughout the County. Over 98% of gross agricultural income was produced on less than 25% of the agricultural land in Monterey County and three crops; leaf lettuce, strawberries, and head lettuce; accounted for 47% of gross agricultural income in 2013.

Monterey County agriculture has remained a stable source of income and employment for over eighty years. However, the mix of land uses and crops has changed over time as the industry continues to adapt to new consumer preferences and technologies. For example livestock, dairy and poultry operations accounted for 22% of farm income in 1929, its relative share of income had fallen to 1% in 2013 as these operations yielded to higher value crops and found lower costs of production in California's San Joaquin Valley. At the other end of the spectrum are nursery crops which were unknown in Monterey County prior to the late 1950's but accounted for 7% of agricultural income in 2013. The growth of this niche was a result of shifts in land use in the San Francisco Bay Area that drove nurserymen out of that area and into Monterey County. Other examples include the shift in production in the fruits and nuts category. Not only has this group of crops increased its share of income from 8% in 1929 to 26.5% in 2013 but the components have changed. In 1929, grapes and strawberries accounted for less than 10% of the value. By 2013, these two crops accounted for over 25% of the value. The following chart provides a rough picture of how the value of different commodity groups has changed over the last 80 years².

1 When comparisons to dollar measures are made in this document, the dollars have been adjusted to 2011 values based on Consumer Price Index Conversion Factors developed at Oregon State. The conversion factors may be found at <http://oregonstate.edu/cla/polisci/sahr/sahr>.

2 There was a change in how crop production values were reported in 2003. Therefore, the chart should only be viewed as a very rough approximation of change over time.

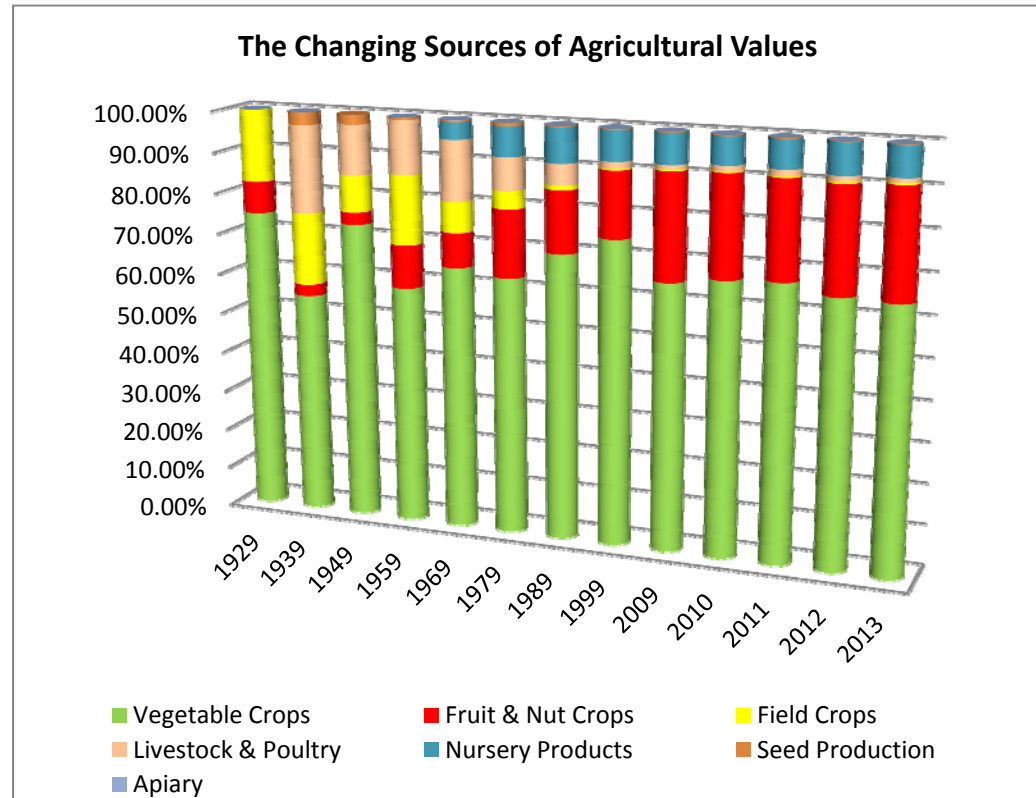
In 2013, Monterey County exported more than 785,687,000 pounds of fruits and vegetables to more than 25 countries around the world. Export income accounted for more than 2% of the total value of agricultural products during the same year. The County's single largest trading partner was Canada, where two-thirds of all exports ended up. Asian nations accounted for another 24% of all exports. Not surprisingly, lettuce accounted for more than half of all exports. Broccoli, celery and strawberries accounted for another 27% of all exports.

Agriculture in Monterey County also dominates the employment landscape. Unlike agriculture in California's Central Valley and the American mid-west that can be harvested mechanically, many of the crops grown in Monterey County need to be tended by hand. Additionally, while the majority of the workforce does not require formal technical or vocational education, it is not necessarily cheap, unskilled labor. People employed on harvesting and maintenance crews are required to make judgments about size and quality of produce as it is harvested

and incorrectly tending fields can cause large economic losses. Nowhere is this more evident than in the area of organic farming where chemical pesticides are not used and routine maintenance, such as weeding, must be done by hand. The US Department of Agriculture's Agricultural Research Service found that maintaining the higher value organic crops can cost upwards of \$1,500 per acre.

Tourism

Tourism as an economic pillar in Monterey County's economy dates back almost to the founding of the first mission in 1770. If agriculture is the engine of the Salinas Valley, then tourism is the engine driving the economy in the Monterey Bay Area. Interestingly, the cities of Pacific Grove and Seaside were originally established as summer holiday destinations and this original use is still evident in the small lot configurations that dominate the residential areas in these two communities.



The first significant tourist destination in the County opened in 1880 with the Del Monte Hotel and Pebble Beach Reserve. This resort began two trends in tourism that continue to guide much of the hospitality industry in Monterey County today. First, in 1887 the Del Monte Hotel opened the Del Monte Golf Course, the oldest continuously operating golf course west of the Mississippi River. Monterey County continues to be a golf destination with more than 15 courses and hosting the annual AT&T Pro-Am Golf Tournament. Second, the Del Monte Hotel began eco-tourism by establishing the Pebble Beach Reserve and the famous 17-mile drive that allowed visitors to enjoy the unique environment.

Eco-tourism continues to play a large role in why people visit Monterey County. There are more than 20 state and federal forests, national monuments or parks spread throughout the County. These resources offer the visitor everything from bird watching from kayaks at the Elkhorn Slough [National Estuarine Research Reserve](#) to rock climbing and spelunking in the Pinnacles National Park and exploring the Coastal Redwood forests in Big Sur.

In addition to natural wonders, Monterey County is home to a wide variety of destinations and events that draw people back for multiple visits over time. Destinations include Mazda Raceway at Laguna Seca (host to stops by the Tudor United Sports car Championship series, FIM Superbike World Championship and the Rolex Monterey Motor Sports Reunion), Monterey Bay Aquarium and events such as the Monterey Jazz Festival and the Sea Otter Classic Bicycle Festival.

There are two main measures of tourism's impact on the County economy; first, how many people it employs; and, second, the dollars it generates in the local economy. In terms of employment, tourism was directly responsible for more than 21,000 jobs, or 12.2% of all civilian employment in 2012. This relative share has remained remarkably stable since 1990, even through economic downturns. Compared to California, the share of people employed in leisure and hospitality in the County is slightly greater than the statewide share of 10.8%. Like agriculture, the vast majority of people employed in the hospitality industry would appear to be filling low skill occupations, however it is these precisely this part of the labor force that makes the biggest impression on visitors from out of the area because they are most often in direct contact with visitors.

There are three measures of dollar activity related to tourism; taxable retail sales; and, transient occupancy taxes. The 2007 economic downturn took a dramatic toll on taxable retail sales, with eating and drinking establishments posting a 9% decrease between 2001 and 2011 and trade at gift, novelty and souvenir stores off 21%. Retail sales at eating and drinking establishments have been slowly growing over the three years ending 2012 and for the first time since 2007-08, taxable retail sales at gift stores grew over the previous year. However, transient occupancy tax collections at inns, hotels, and motels in the unincorporated areas increased by 15% between fiscal 2011 and fiscal year 2012, which could signal the beginning of a positive growth trend.

Education & Research

While it was not until 138-years after the first California State University (CSU) was founded that a CSU was established in Monterey County, education and particularly research associated with the marine sciences has a long history in the County. Today, in addition to CSU Monterey Bay, there are at least nine institutions in the County that provide educations leading to associate, bachelor, master, and doctorate degrees. These institutions include: California State University Monterey Bay (CSUMB); Defense Language Institute (DLI); Hartnell Community College; Hopkins Marine Station; Monterey College of Law; Monterey Institute of International Studies (MIIS); Monterey Peninsula Community College; Moss Landing Marine Laboratory; and, the Naval Postgraduate School

While the County appears to have a sufficient number of degree granting institutions, many of them pose challenges to adequately preparing the workforce for the types of jobs found in Monterey County. For example, the Defense Language Institute was specifically established to train military linguists who leave the area once their education is complete. Similarly, while the Naval Postgraduate School does an excellent job educating military officers; the officers are required to commit to an extended enlistment period and cannot put their learning and ideas into practice growing the local economy when they graduate.

The first marine research station on the west coast (and the third oldest in the nation) was established by Stanford University on the shores of Pacific Grove in 1882. Since its founding, the Hopkins Marine Station (HMS) has provided generations of Stanford students the opportunity to learn oceanography on the Monterey Bay. Today Hopkins Marine Station has a permanent teaching and research faculty of ten.

In 1966, seven CSU campuses in northern and central California came together and established the Moss Landing Marine Laboratory (MLML). MLML administers the Master of Science in Marine Science program for CSUs in northern and central California and has eighteen research and tenured faculty. MLML has an annual research budget of approximately \$20 million annually. MLML has an extensively outfitted marine operations department that includes three research vessels. Research affiliates co-located at MLML include the Southwest Fisheries Science Center Marine Turtle Research Program; Central Coast Wetlands Group; Marine Pollution Studies Laboratory; Marine Optical Buoy Project; and Science, Learning and Exploration with the Help of Sea Lions.

The Monterey Bay Aquarium Research Institute (MBARI) was established in 1987. Today, MBARI has an annual budget of \$35-40 million annually and employs more than 140 people in research and development related to oceanography and the engineering needed to support oceanography. MBARI has identified six main goals for its research: 1) identify important areas of marine science where research progress is limited by lack of appropriate technology; 2) develop sophisticated systems for investigating aspects of the marine environment and its inhabitants where high scientific potential exists; 3) meet the highest possible performance standards for the operation of its equipment and technological systems; 4) conduct high-quality, innovative research that maximizes effective management and use of all MBARI assets; 5) develop, in collaboration with the Monterey Bay Aquarium, creative programs that maximize the educational value of MBARI's research results; and 6) transfer research results, technology, and operational techniques to the marine science community worldwide.

Federal Expenditures in Monterey County

According to data contained the 2008 California Statistical Abstract, federal expenditures in Monterey County in 2005-02 totaled \$2.5 billion. The Department of Defense accounted for approximately 27% of federal expenditures in the County but only but only 18% statewide indicating that the County could be more vulnerable than the rest of the state to cuts in the Department of Defense. Assuming that most other patterns of federal expenditures locally mirror the statewide pattern, approximately \$1.25 billion is spent on direct payments to individuals through programs such as social security and Temporary Assistance for Needy Families (TANF).

Population

Approximately 415,000 people called Monterey County home in 2012. There are two demographic trends emerging that could reshape the County's economy. First, between 1980 and 2000, population growth in Monterey County roughly followed the state and federal growth trends, even with the closure of Fort Ord in 1994 and relocation of thousands of soldiers. However, between the 2000 and 2010 census, the County only grew by 3% while the nation and state grew by 10%. Second, the population is shifting between the Monterey Bay area and Salinas Valley. In 1990, the County's population was roughly split between the three regions. By 2010, more than 50% of the population lived in the Salinas Valley cities.

Given the perception of agriculture being a low wage industry, it is surprising that the poverty rate in Monterey County is only 13.5%, compared to 14.2% in California and an average of 19% in the ten largest agricultural counties in the state. This tends to support the idea that agriculture in Monterey County is different than elsewhere. However, 1996 and 2006, per capita income in Monterey County grew at a slower rate than per capita income did for California as a whole. If this trend continues it will reduce the amount of disposable income as housing and other essential purchases consume more of the individual's paycheck.

Geography

Monterey County is located on the central coast of California and covers approximately 3,322 square miles. Approximately 15% of the land within the County is under the control of the state or Federal governments. The largest single use by the federal government is the Los Padres National Forest Monterey Ranger District. This district encompasses more than 240,000 acres of wilderness between the Pacific Ocean and Salinas Valley. The 167,683-acre Fort Hunter-Liggett is one of the largest US Army bases west of the Mississippi River. There are also more than 20 state and national forests, monuments and parks in the County.

The size of Monterey County creates the impression of vast open spaces with little in the way of development. For example, there is an average of ten miles between communities as one travels south-southeast from Castroville, through Salinas and down to King City, the southernmost city in South Monterey County. Between these communities are fields of low laying row crops that allow the traveler to see from the Santa Lucia to the Gabilan mountains. Less than ten percent of this approximately 435 square mile area, about 31 square miles, is developed. The 19-mile drive between Salinas and Monterey appears to be largely undeveloped rolling foothills and coastal scrub oak

habitat. The long, “undeveloped”, distances that residents travel, have conditioned County residents to accepting, and wanting to preserve, at almost all costs, the “natural” beauty of the County. This perception of “natural” space throughout the County creates challenges to any proposal that would convert land to other uses, including uses that would support creating higher skilled jobs that rely on the agriculture, such as food processing plants or wineries.

Adjacent to the Salinas Valley and lying between Salinas and the cities of the Monterey Bay is the former Fort Ord. The closure of the almost 44-square mile Fort Ord in 1994 presented the County and cities of the Monterey Bay with a unique opportunity to develop new urban areas on previously developed land. Sixty-two percent, over 17,000-acres, of the base was set aside for open space, the recently recognized Fort Ord National Monument managed by the U.S. Bureau of Land Management. However, because the so much of the base was used for live fire training, only about 9,800-acres is actually available for recreational use. The remaining 7,200-acres will remain undeveloped but inaccessible because of the hazards posed by unexploded ordinance. Because so much of the base was earmarked as open space and the initial development took place away from existing urbanized areas, the undeveloped nature of the former Fort Ord has reinforced the idea that the County is undeveloped and should remain so.

There are three prominent physical features that influence Monterey County. The County has approximately 95 miles of coastline with the Pacific Ocean/Monterey Bay. Inland, the County is dominated by the Santa Lucia Mountains to the west and the Gabilan range to the east. These mountain ranges form the Salinas Valley. The Salinas Valley covers approximately 425 square miles between Salinas in the north and King City to the south. These mountain ranges channel the cooler ocean breezes down the Salinas Valley and contribute to making it one of the most productive agricultural regions in the world. The floor of the Salinas Valley is used primarily for growing vegetables, while the bench lands leading into the foothills on both sides of the valley support grape vineyards.

Offshore, the Monterey Bay is dominated by the Monterey Bay Submarine Canyon, which extends 95 miles into the Pacific. Most of the canyon is more than a mile deep but goes as far down as two mile in places. The canyon is home to numerous thermal vents which make for a nutrient rich environment. The near shore depth and abundant nutrients make the Monterey Bay Submarine Canyon a unique place to conduct ocean research.

Monterey County does not have any significant lengths of major earthquake fault lines but the San Andreas Fault does run through the southeastern corner of the County. It is here where the traveler can find one of the most seismically active towns in the lower 48 states, Parkfield. Parkfield is home to the U.S. Geological Survey’s (USGS) Parkfield Experiment. This experiment is designed to take advantage of the regularity of earthquakes in the area to help the USGS better understand earthquakes.

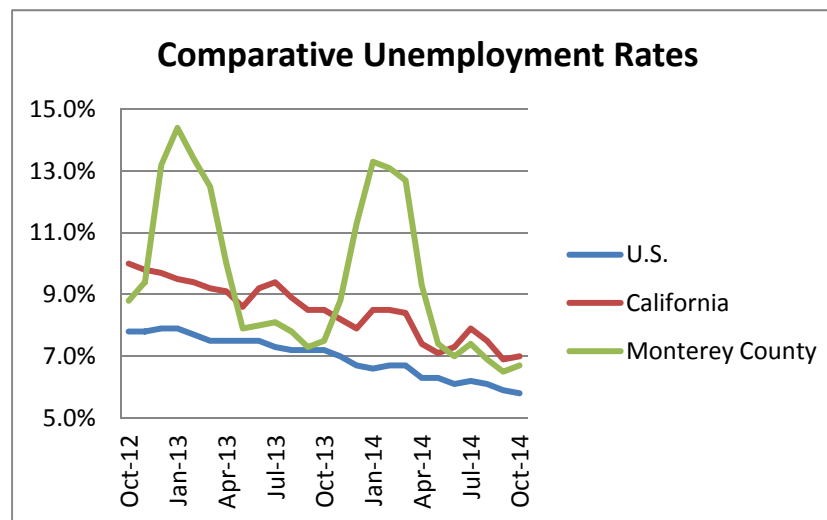
The southeastern extremes of the County include part of the Monterey Shale Formation. Conventional drilling techniques have been used to pump oil out of San Ardo oil field in this Formation since the late 1940’s. With 7.2 billion barrels of oil produced in 2012, the San Ardo field is the eighth largest in the state and accounted for approximately 5% of the total statewide oil production. Unlike most other oil fields

in the state, the San Ardo oil field has posted year over increases in barrels produced but also increased its share of statewide production every year since 2008³. Current estimates indicate that the Monterey Shale Formation may contain up to two-thirds of the United States' shale oil deposits. The petroleum industry is exploring new ways, such as fracking, to exploit these deposits, which could lead to increased economic activity in this area.

Workforce Development & Utilization

In 2013, the County's labor force numbered approximately 221,600 people and an annual average unemployment rate of 9.8%. While the annual average unemployment was 2.4% higher than the national rate (and less than one percent higher than the state), unemployment in Monterey County is subject to large variation during the year. For example, in January 2013, the County's unemployment rate was over 14% but dropped to 7.3% in September. This pattern of high unemployment in winter and lower unemployment during the peak summer months has been a fairly stable pattern in the County for at least the last ten years. The pattern also mirrors the cyclical nature of agricultural and tourism activity in the County⁴.

Similar to population growth, the County's labor force grew almost as fast as the state's between 1990 and 2000; however, between 2000 and 2012 labor force growth in the County was less than half the state's growth rate (8.8% versus 21.9%). Labor force statistics for the County also highlight how different and dominate agriculture is in Monterey County's economy.



Since 1990, agricultural employment in these counties has decreased by an average of 3%. However, the trend is very different in Monterey County where the share of jobs in agriculture has increased by 8%. The growth in agricultural employment in Monterey County highlights the labor intensive nature of agricultural production in the County compared to other areas of the state. Table 2 provides additional details on the changing levels of agricultural employment in California's ten largest (by value) agricultural counties⁵ over the last 22 years.

³ 2012 Preliminary Report of California Oil and Gas Production Statistics; California Department of Conservation, Division of Oil, Gas and Geothermal Resources; issued April 2013.

⁴ Monterey County does not have a large number of employers that are subject to the requirements of the Worker Adjustment and Retraining Notification Act (WARN). In 2012, only six businesses filed WARN letters with the California Employment Development Department.

⁵ California Agricultural Statistics Review 2012-2013; California Department of Food and Agriculture

Table 2

	<u>Agricultural Share of Jobs in County⁶</u>			
	1990	2000	2010	2012
California	3%	3%	3%	3%
Fresno	19%	17%	14%	15%
Tulare	28%	27%	26%	24%
Kern	15%	20%	16%	19%
Monterey	21%	23%	27%	29%
Merced	22%	18%	16%	18%
Stanislaus	11%	10%	8%	8%
San Joaquin	9%	8%	8%	7%
Kings	20%	20%	16%	15%
Imperial	33%	24%	17%	18%
Ventura	7%	7%	8%	9%

Table 3

Comparison of Unemployment in California's 10 Largest Agricultural Counties 2008-2012

	Low	High	5-Yr Average
California	7.2%	12.4%	10.60%
Fresno	13.20%	17.20%	14.80%
Tulare	14.20%	17.70%	15.10%
Kern	11.40%	15.30%	13.70%
Monterey	8.60%	16.10%	10.50%
Merced	14.00%	19.90%	16.70%
Stanislaus	13.20%	16.80%	15.20%
San Joaquin	13.70%	17.00%	15.00%
Kings	13.10%	17.50%	14.60%
Imperial	26.30%	31.90%	27.60%
Ventura	8.50%	9.80%	9.20%

Table 3 shows the range of unemployment in these counties and the average unemployment rate over the last five years. There are a couple of things that jump out; first Monterey County has had the second lowest overall unemployment rate over the five year period; and, second, unemployment swings in the County are greater than in any of the other counties.

The educational level of the County's labor force does not track with state or national educational attainment. Table 4 compares the level of educational attainment for people older than 25. The most extreme difference is in the percentage of the labor force older than 25 who do not have at least a high school or equivalent degree. The high rate of people who have not completed high school in Monterey County is possibly related to the relatively high proportion of the population that are not native born (31% of the County's population is foreign born while only 13% of the U.S. population is⁷) and who are not U.S. citizens (45% of foreign born U.S. residents have become naturalized citizens while only 27% of foreign born residents of Monterey County have become citizens). These statistics tend to support

⁶ The counties are sorted by largest production by value.

⁷ American Community Survey, Table ACS_11_1YR-DP02; accessed June 6, 2013

the hypothesis that a large portion of the County’s population finds it difficult to take advantage of educational and training opportunities because of their citizenship status.

Table 48
Educational Attainment in Monterey County

	United States	California	Monterey County
No H.S. Diploma	14.1%	18.9%	31.2%
H.S. Diploma	28.4%	21.1%	20.2%
Some College	21.2%	22.1%	18.5%
Associate Degree	7.8%	7.7%	7.3%
Bachelor's Degree	17.9%	19.2%	14.3%
Graduate or Professional Degree	10.6%	11.1%	8.5%

As noted above, Monterey County appears to have plenty of opportunities for the local labor force to obtain technical and/or advanced education. There are several reasons that work against these institutions being effective partners in developing the local labor force. First, the high rate of people not completing high school means they are unlikely to be able to take advantage of these opportunities (ignoring any citizenship issues that may make them ineligible for the programs). Second, many of these institutions are only satellite operations of other schools. For example, in order to study at the Moss Landing Marine Laboratory, a student would already have to be enrolled at one of the consortium CSU campuses. Similarly, Hopkins Marine Station requires applicants to already be students at Stanford University, while DLI and the Naval Postgraduate School are only open to serving members of the U.S. military or employees of specific federal departments. While these institutions do provide a base of highly educated faculty, the fact that they are not the students’ home campus makes it likely that the students will leave the area when they complete their studies. Third, the high cost of education makes it difficult for the County’s labor force to take advantage of training opportunities when they are available. The cost of education is not just measured in the dollar cost of tuition and books but the opportunity cost of giving up hours at work.

Transportation Access

Like many other areas of California roads and highways dominate the transportation landscape. There are almost 2,400 miles of public roads and highways in Monterey County. Maintenance for approximately 80% of the road miles are the responsibility of the cities and County. There are six state highways in the County. The main north-south highway is State Route 101. This is a key transportation link to moving produce out the Salinas Valley and visitors into the County from the San Francisco Bay Area. Approximately 9,500 trucks, 16% of

8 Ibid

all traffic passing this point, a day cross the Monterey-San Benito county line at the northern county end of Monterey County. At the southern end of Monterey County, approximately 18% of the daily traffic on Highway 101 is trucks.

If Highway 101 is the County's transportation backbone, then Highway 1 is its soul. Highway 1 snakes along the Pacific Coast from the San Luis Obispo County line in the south to Watsonville in the north. This two lane highway is well known for its stunning views along the Big Sur Coast. It is also the only way to access the tourist destination of Big Sur, approximately 25 miles south of the City of Carmel-by-the-Sea. North of Seaside, Highway 1 becomes more heavily used by tourists and commercial vehicles that move the materials and produce that support the artichoke and strawberry fields of north Monterey County.

The County has one airport that serves commercial airlines and three other general aviation airports. Monterey Regional Airport, located on the Monterey Peninsula, is the commercial air hub for Monterey County. The airport is served by Alaska Airlines, America West, Alligiant, United and USAirways with direct flights to Denver, Las Vegas, Los Angeles, Phoenix, San Diego, and San Francisco. The airport district aggressively promotes the facility as an alternative way to travel to and from the County. An example of the airport district's efforts is the work it did in 2013 with the airlines and local wineries. The goal was to establish a program were the airlines would waive baggage fees for the first case of Monterey County wine checked by each departing passenger.

The other general aviation airports in the County are Del Mesa in King City, Marina Municipal Airport, and Salinas Municipal Airport. The Salinas airport has a 6,000 foot runway that can accommodate the largest U.S. Air Force transport aircraft. Salinas has over 200 air operations daily, which includes a large number of flights associated with crop dusting.

The County is served by the Union Pacific Railroad's Coast line route which provides direct service to Los Angeles and San Jose. As Union Pacific property in San Jose became more valuable for other uses the railroad has shifted its main switching and train assembly operations to the Watsonville Junction in northern Monterey County. The Monterey County agriculture industry does not rely on rail to transport its products. This is primarily due to relative speed of trains versus trucks. For example, moving a load of lettuce from Los Angeles to Columbus, Ohio by train would take five days⁹, once the load arrived in LA. Shipping the same load by truck with a solo driver would take less than three days.

9 <http://www.up.com/customers/announcements/intermodal/domesticservicelanesandschedules/IM2013-220.html>

Analysis of Economic Development Problems and Opportunities

Economic Strengths & Weaknesses in Human & Economic Assets

As part of the Economic Opportunities in Monterey County: Asset Inventory and Opportunity Identification Report, SRI prepared several tables that highlighted the comparative advantages and disadvantages of various human and economic assets in the County. The following table summarizes these assets.

Category	Competitive Advantage	Competitive Disadvantage
Business Environment Assets		
Community Design Guidelines	<ul style="list-style-type: none"> Established community design guidelines provide certainty about building requirements and amenities that business may be required to provide 	
Ease of Starting a Business	<ul style="list-style-type: none"> Easy to file/incorporate 	<ul style="list-style-type: none"> Very difficult to build/expand (time, cost, uncertainty of outcomes)
Regulatory Environment		<ul style="list-style-type: none"> Extremely complex and arcane Regulations are often in conflict (e.g. food safety vs. environment) Not customer-oriented Land use policy is vague
Taxation		<ul style="list-style-type: none"> Very unfavorable compared to nationwide average
Legal Environment		<ul style="list-style-type: none"> High risk of litigation over land use / property rights Adversarial relationship between communities & stakeholders
Financial & Capital Assets		
Credit Access	<ul style="list-style-type: none"> Sophisticated agricultural finance (Rabobank) 	<ul style="list-style-type: none"> Lack of microcredit for emerging businesses Demand for Revolving Lines of Credit less than \$250,000
Risk Capital	<ul style="list-style-type: none"> Access to Silicon Valley venture capital networks 	<ul style="list-style-type: none"> Limited public financial resources No integration with Silicon Valley venture capital networks
Wealth	<ul style="list-style-type: none"> High level of local wealth Substantial resources in agricultural sector 	<ul style="list-style-type: none"> Lack of angel capital Wealth is highly concentrated Housing crisis undermines residential wealth

Category	Competitive Advantage	Competitive Disadvantage
Non-Profit Sector	<ul style="list-style-type: none"> • Small number of very strong foundations (Packard, etc) 	<ul style="list-style-type: none"> • Resources across County are not very deep • Lack of access to grant funding
Human Capital Assets		
K-12	<ul style="list-style-type: none"> • Select number of good schools • School performance is improving 	<ul style="list-style-type: none"> • Low level of educational attainment
Post-secondary	<ul style="list-style-type: none"> • Strong community colleges (Hartnell, MPC) 	<ul style="list-style-type: none"> • Constrained capacity at institutions • Need for more specialized vocational programs
Tertiary	<ul style="list-style-type: none"> • CSUMB • Naval Postgraduate School • Language training (DLI & MIIS) 	<ul style="list-style-type: none"> • Faculty & student isolation • Constraints on growth (due to water, etc)
Workforce/Talent	<ul style="list-style-type: none"> • Historically strong work ethic • Specialized talent in agriculture, marine, languages 	<ul style="list-style-type: none"> • Emerging town & gown issues • Most talented workers migrate to Silicon Valley • Agriculture dependent on low-wage labor
Demographics	<ul style="list-style-type: none"> • Large cohort of younger residents, especially in South County 	<ul style="list-style-type: none"> • Tremendous diversity in population
Physical Assets		
Transportation Infrastructure	<ul style="list-style-type: none"> • Spare capacity in freight rail for shipping 	<ul style="list-style-type: none"> • Insufficient inbound / outbound road capacity • Difficulty moving within County • Lack of public transit options • Lack of airlift capacity
Utilities (Energy & Water)	<ul style="list-style-type: none"> • Sufficient energy capacity • New project to increase water supply on Peninsula 	<ul style="list-style-type: none"> • Localized constraints on water supply • Localized constraints on wastewater treatment capacity
Climate & Natural Environment	<ul style="list-style-type: none"> • Soil conditions ideal for agriculture industry • Favorable climate for tourism and recruiting • Marine sanctuaries/coastal • Large amounts of open space 	<ul style="list-style-type: none"> • Lack of widespread broadband access • Strict regulations on mitigating impact of development on natural environment • Advantage is contingent on ensuring sustainability of current practices
Technical Assets		
Industry Base	<ul style="list-style-type: none"> • Agriculture (especially seed research) • Education 	<ul style="list-style-type: none"> • Health care/biomedical • IT-related industries

Category	Competitive Advantage	Competitive Disadvantage
Research Institutions	<ul style="list-style-type: none"> • Oceanographic & coastal research (MLML, MBARI, HMS, NOAA Marine Sanctuary) • Security & Policy Research (NPS, DLI, MIIS, Panetta) 	<ul style="list-style-type: none"> • Lack of research university
Technical Workforce	<ul style="list-style-type: none"> • Strength in environmental / ocean / biological R&D • Agricultural technology (Hartnell, USDA, UC Davis) 	<ul style="list-style-type: none"> • Outdated facilities & potential cuts to agricultural research (Davis, USDA) • Lack of strong general IT workforce
Research Infrastructure	<ul style="list-style-type: none"> • Computing facilities (especially DOD & NOAA) • MBEST (emerging) 	<ul style="list-style-type: none"> • Lack of entry-level & mid-tier technical workers • Poor broadband penetration • Lack of research/industrial park development
Quality of Life Assets		
Commute Times	<ul style="list-style-type: none"> • Relatively short "rush hour" 	<ul style="list-style-type: none"> • Long commutes for low-income workers
Green Space	<ul style="list-style-type: none"> • Extremely plentiful & pristine 	<ul style="list-style-type: none"> • Need more cross-county public transit • Difficult to balance development with open space policy
Environment/Climate	<ul style="list-style-type: none"> • Strong parks system • Very favorable - desirable for residents & visitors 	<ul style="list-style-type: none"> • Very high crime rates in Salinas & gang activity (including South County)
Crime/Social Issues	<ul style="list-style-type: none"> • Strong civic participation in key issues (environmental, preservation, community development) 	<ul style="list-style-type: none"> • High unemployment (especially in Hispanic community) • Lack of affordable housing on Peninsula

Problems & Opportunities posed by external and internal forces affecting the regional economy

Paradoxically, open space is both one of the County's greatest economic strengths and simultaneously one of its greatest weaknesses. On the positive side, the perceived open space is a tremendous asset for attracting visitors and contributing to the overall quality of life for the County's residents and visitors. However, the commitment of parts of the community to preserve the "hill to hill" views in the Salinas Valley mean that conversion of land in agricultural production is very difficult, even if the proposed change is to make the industry more competitive.

Water

The ongoing drought presents the County with probably its greatest challenge. Water is the essential lifeblood of agriculture and it is in increasingly short supply. Considering how important water is to agriculture, it is surprising that the County is not connected to any state or federal water transfer systems that serve the San Joaquin Valley or southern California (and are also suffering from historic low levels). The lack of connections to outside sources means that the County must explore expensive alternatives to either connect to external sources of supply and/or some combination of new internal mechanisms to capture rainfall, desalination, and conservation.

Opportunities

- Known, quality travel destination with many existing annual events
- Expansion as an "eco-tourist" destination
- Expand value added processing to wine grape crop to attract new and retain existing visitors

Challenges

- Adversarial relationship between communities and stakeholders
- Perceptions
 - Agricultural uses = open space
 - Competition for same employees
 - Lack of "skilled"/qualified employees
- High percentage of population that has not completed high school
- Growing emphasis on eating local could reduce demand for "industrial scale" or "out of season" produce

CEDS Goals & Objectives – Defining Regional Expectations

Goal 1 Business Strategy

- Strengthen County and cities business climate
- Business attraction, retention, expansion, and formation
- Grow and expand start-up businesses by providing small business loans (EDA-Revolving Loan Fund)

Goal 2 Workforce Strategy

- Linking residents with jobs by maximizing our Workforce Investment Board and educational/training partners
- Developing our people through education, training and job experience

Goal 3 Place Strategy

- Land supply, opportunities and civic amenities, continue to provide infrastructure and permit assistance
- “Wine Corridor” further develop value added wine production by bottling and labeling locally
- Certified sites-provide sites matched to our opportunity areas
- Retain the Naval Post Graduate School, Defense Language & Foreign Language Institutes while providing a welcoming community for the military
- In-fill sites and Transit Oriented Development to re-use and repurpose real estate that could generate more jobs

Goal 4 Participation Strategy

- Meeting customer needs
- Participation in key regional initiatives in Monterey County, Santa Cruz and San Benito Counties.
- Leverage and partner with existing community and economic agencies and organizations to create a “collective impact”

Community and Private Sector Participation

The Office of Economic Development actively works with a broad cross section of local business, civic and non-profit organizations to better understand and develop economic opportunities for the residents of Monterey County. These groups include:

<u>Organization</u>	<u>Purpose</u>
<ul style="list-style-type: none">• Association of Monterey Bay Area Governments (AMBAG)	Regional planning organization
<ul style="list-style-type: none">• Central Coast Marketing Team	Regional marketing organization
<ul style="list-style-type: none">• Defense Alliance Committee	Local government & business group organizing for future BRAC rounds
<ul style="list-style-type: none">• Grower-Shipper Association	Non-profit association of agricultural product growers and shippers
<ul style="list-style-type: none">• Monterey Bay Business Council	Non-profit business association promoting economic development.
<ul style="list-style-type: none">• Monterey Bay City Managers Association	
<ul style="list-style-type: none">• Monterey Peninsula Chamber of Commerce	
<ul style="list-style-type: none">• Salinas United Business Association	Business association specifically formed to meet the needs to small businesses in Salinas.
<ul style="list-style-type: none">• Salinas Valley Chamber of Commerce	
<ul style="list-style-type: none">• Transportation Agency for Monterey County (TAMC)	Countywide transportation planning agency.

Business Outreach

Beginning in September 2013, the County, in cooperation with the cities of Gonzales, Soledad, Greenfield, Soledad, and King City completed more than 90 retention/expansion interviews with a wide range of businesses representing multiple industries and business sizes. These interviews, which typically take 45 to 60 minutes, are helping the County and participating jurisdictions develop a better picture of the businesses in the County. Topics covered during the interviews include: employment data and expectations; products and services currently provided; products and services that are missing; workforce requirements; community impact, the use of technology; how business management perceives the local business climate; and, expectations for near term (6-12 month) economic activity. When appropriate, the County has used these interviews to help connect the business with existing resources that the business owner did not know about before the interview.

The most successful example of this has been the number of referrals to the America's Job Center of California. This collaborative effort of the California Employment Development Department (EDD), Workforce Investment Board (WIB), and Office for Employment Training (OET) was established as part of the local response to the Workforce Investment Act (WIA). The connection created during the initial interview allows the County to introduce this service and help the employer find qualified employees. The County has also used the interview process to introduce businesses who have indicated that they are experiencing difficulty accessing capital to support growth to

the County’s Small Business Revolving Loan Fund and the County’s financial partner, California Coastal Rural Development Corporation, to see if there might be non-traditional ways to finance business growth.

Strategic Projects, Programs and Activities

The County of Monterey will focus on projects, programs and activities that are proposed for existing areas of development. These areas include the six cities or unincorporated communities in the Highway 101 corridor (Salinas, Chualar, Gonzales, Soledad, Greenfield and King); cities that received developable land through the closure of Fort Ord (Marina and Seaside); and the unincorporated communities of Castroville and Pajaro. The County proposes to use EDA funding primarily to address infrastructure (transportation, sewer and water) deficiencies within these communities.

Proposed Projects

<u>Applicant</u>	<u>Project Name</u>	<u>Brief Project Description</u>	<u>Anticipated Economic Benefit</u>
Castroville Community Services District	Mainline sewer by-pass	New sewer main from Tembladera to MRWPCA pump station to relieve surcharging	Allow for future growth
Castroville Community Services District	New Well	Drill new well at Ocean Mist Parkway cul de sac	Replaces intruded well and allows for additional capacity for future growth
Castroville Community Services District	Sewer manhole replacement in Moss Landing	Replace 16 badly degraded manholes along hwy 1 and Moss Landing Rd	Needed upgrades for current and future sewer capacity
City of Gonzales	Agricultural Business Park Phase II Expansion	120-acre expansion of existing business park	
City of Gonzales	North Alta and Highway 101 Interchange Redesign		
City of Gonzales	Sanitary Sewer Collection System Upgrades & Improvements		
City of Gonzales	Storm Water Drainage Improvements		
City of Gonzales	Traffic Roundabouts @ Highway 101 Ramps		
City of Gonzales	Wastewater Treatment Plant Expansion Land Acquisition, Equipment Upgrades & Modernization		

<u>Applicant</u>	<u>Project Name</u>	<u>Brief Project Description</u>	<u>Anticipated Economic Benefit</u>
City of Gonzales	Water Well & System Main Repairs & Upgrades		
City of Greenfield	Tom Rogers Museum	Construct community museum to celebrate the history and culture of Greenfield.	Provide additional local jobs during construction and permanent jobs to staff, maintain, and operate the museum. By enriching the cultural amenities of the community, this will create a more positive and supportive environment for new businesses, job creation, and present Greenfield as a more vibrant community for new business development.
City of Greenfield	Walnut/3rd Roadway Improvements	Improve roadway on Walnut Avenue and 3rd Street to support new commercial development within the Walnut Avenue Specific Plan area.	Roadway improvements will be required to support anticipated commercial development within the Walnut Avenue Specific Plan area. This area is currently agricultural and commercial development will support new job development, economic growth of the community, and new business development. Development of the Walnut Avenue Specific Plan area cannot occur without required roadway improvements.
City of Greenfield	Walnut/3rd Water and Sewer Improvements	Extend and upgrade water and sewer service to support new commercial development within the Walnut Avenue Specific Plan area.	Water and sewer improvements will be required to support anticipated commercial development within the Walnut Avenue Specific Plan area. This area is currently agricultural and commercial development will support new job development, economic growth of the community, and new business development. Development of the Walnut Avenue Specific Plan area cannot occur without required water and sewer improvements.
City of Greenfield	Wastewater Pipeline Extension/Replacement and Lift Stations	Extend existing wastewater pipelines to streets and areas of the City not currently connected to the City's wastewater collection system.	Expand areas of the City served by the City's wastewater collection system to support new housing development and business development. Expansion of the wastewater collection system is required to support projected population growth and new economic development and business growth. Resulting new housing development which is required to support new business and economic development. New housing construction will create new local jobs.

<u>Applicant</u>	<u>Project Name</u>	<u>Brief Project Description</u>	<u>Anticipated Economic Benefit</u>
City of Greenfield	Water Pipeline Extension/Replacement and Pump Stations	Extend existing 12” water pipelines to streets and areas of the City not served by a 12” line.	Expand areas of the City served by the City’s domestic water system to support new housing development and business development. Expansion of the water distribution system is required to support projected population growth and new economic development and business growth. Resulting new housing construction and business development will create new local jobs.
City of Greenfield	Water Storage Tank #3	Development of new domestic water storage tank of 1.5 million gallons.	Expand City’s domestic water capacity to accommodate projected population growth and support expanded economic development.
City of Greenfield	Well #8	Development of new domestic water well to provide additional daily capacity.	Expand City’s domestic water capacity to accommodate projected population growth and support expanded economic development.
City of Marina	8th St. Improvements - California Ave. to Intergarrison Rd.	Reconstruct roadway with new bike lanes, sidewalks, multi-use trail & street lighting	Improvements are EIR mitigation measures to address the redevelopment of former Fort Ord for economic reuse, educational reuse and environmental protection & conservation while generating new jobs lost upon the Fort Ord base closure <ul style="list-style-type: none"> • This project will support the reuse of a closed military base.
City of Marina	Beach Road Improvement Project	Widen Roadway & modify intersection for roundabout	Improvements are EIR mitigation measures to address the Marina Station Specific Plan a mixed used planned development with a direct impact to stimulating economic growth and jobs creation
City of Marina	Del Monte Blvd./Beach Rd. Intersection Improvements Project	New Traffic Signal, Sidewalks, ADA Ramps, & Right Turn lane	Improvements are EIR mitigation measures to address the Marina Station Specific Plan a mixed use planned development with a direct impact to stimulating economic growth and jobs creation.
City of Marina	State Route 1/Imjin Parkway Intersection Improvements	New Traffic Signals for the South Bound and North Bound Ramps including a potential bridge widening or functional equivalent	Improvements are EIR mitigation measures to address the redevelopment of former Fort Ord for economic reuse, educational reuse and environmental protection & conservation while generating new jobs lost upon the Fort Ord base closure <ul style="list-style-type: none"> • This project will support the reuse of a closed military base.

<u>Applicant</u>	<u>Project Name</u>	<u>Brief Project Description</u>	<u>Anticipated Economic Benefit</u>
City of Marina	University Drive Extension	Extend University Drive north from Research Drive within the Marina Municipal Airport	Improvements enable the development of the Business Park at the Marina Municipal Airport. Consistent with the General Plan, development of industrial manufacturing & related uses would generate new jobs lost upon the Fort Ord base closure <ul style="list-style-type: none"> This project will support the reuse of a closed military base.
City of Salinas	Economic Adjustment Assistance for McGraw-Hill facility closure	Facility closed in 2007 and has remained vacant.	Reposition building and make tenant improvements to attract new tenant to building.
City of Salinas	Design & Construction of Industrial Waste Water Conveyance System		
City of Salinas	Economic Adjustment Assist for Capital One Card Processing Facility Closure (Phase 1)	Facility closed in phases through 2012 and displaced 850+ employees.	The facility has been sold but the reuse will not increase local employment. The City of Salinas is working on a business plan to develop new, private sector employment through business expansion and retention efforts.
City of Salinas	Economic Adjustment Assist for Capital One Card Processing Facility Closure (Phase 2)		
City of Seaside	West Broadway Urban Village Infrastructure Improvement Plan	The WBUV Infrastructure Improvement Project Plan Area includes the length of Broadway Avenue from Fremont Boulevard to Del Monte Boulevard (referred to here as West Broadway Avenue), as well as Del Monte Boulevard from Canyon Del Rey Boulevard to Contra Costa Street and portions of those streets intersecting Broadway Avenue and a small portion of Contra Costa Street. The purpose of the project is to encourage development of underutilized private property along the West Broadway and improve access for alternative modes of transportation by widening sidewalks, adding bicycle lanes and adding pedestrian amenities, such as trees and benches. Estimated cost for the project construction is over \$13 Million.	It is envisioned that the urban village will become the hub of a new downtown serving local residents, California State University Monterey Bay (CSUMB) and Monterey Peninsula visitors. The goal of the project is to create a vibrant transit oriented downtown that provides jobs for the community and generates revenue for the City.
City of Seaside	Monterey Peninsula Water Supply Project	The Monterey Peninsula Water Supply Project (MPWSP) is California American Water Company's solution to the Monterey Peninsula region's ongoing	The purpose of the project is to ensure a reliable, long-term water supply for the community and to support future economic growth. Establishing a water supply is a critical component needed to ensure success of the City's and

<u>Applicant</u>	<u>Project Name</u>	<u>Brief Project Description</u>	<u>Anticipated Economic Benefit</u>
		<p>water supply crisis. The project includes a desalination facility, distribution piping and facilities, and additional aquifer storage capacity. Much of the distribution piping and facilities and the groundwater storage facilities will be constructed in the City of Seaside. The facility is expected to produce produce 9,750 acre-feet of water per year. Severe negative economic impact will result if the project is not built because the already limited water supply would be cut in half by State order. Estimated cost of the project is over \$270 Million.</p>	<p>region's economic development business expansion and attraction efforts.</p>
City of Seaside	Main Gate Entrance and Light fighter Drive Improvement Project	<p>The public improvement project would improve Lightfighter Avenue and adjacent streets from Highway 1 to General Jim Moore Boulevard. The purpose of the project is to enhance traffic circulation and alternative modes of transportation, and upgrade utilities. Estimated costs for the proposed project are not known but expected to be between \$10 to 20 Million.</p>	<p>This project will improve multi-modal access to a proposed regional lifestyle center, hotel, and mixed-use, university serving developments that will create jobs and revenue for the City.</p> <ul style="list-style-type: none"> • This project will support the reuse of a closed military base.
City of Seaside	Sewer Upgrade Projects	<p>There are several sewer collection system upgrades required to support potential future development within the Seaside County Sanitation District Service Area. These projects include both up-sizing existing sewer lines and existing lift stations and are described in the SCSD Sewer Master Plan. The total estimated cost for these upgrades is more than \$16 Million. Additional upgrades would be necessary to the sewer collection system within the Ord Community to accommodate future development in this area. The cost perform these upgrades could be between \$10 Million to \$20 Million.</p>	<p>This infrastructure component is a key element needed to ensure success of the City's and region's economic development business expansion and attraction efforts.</p>

<u>Applicant</u>	<u>Project Name</u>	<u>Brief Project Description</u>	<u>Anticipated Economic Benefit</u>
City of Seaside	West Broadway Urban Village Parking Structure and Library Mixed Use Development	<p>A public library, parking structure and mixed-use development has been identified as a catalyst and opportunity site to initiate the implementation of the proposed West Broadway Urban Village (WBUV) Specific Plan. The proposed development site is comprised of both publicly and privately owned parcels and includes the area bordered by Olympia Avenue to the north, Broadway Avenue to the south, Hillsdale Street to the west and Alhambra Street to the east. The proposed project includes the following components.</p> <ul style="list-style-type: none"> • Library 20,000 sqft • Retail 20,000 sqft • Residential 80 units (senior/affordable) • Parking up to 500 spaces • Public Plaza 5,000 sqft 	<p>As a catalyst project, this project would create jobs and provide the parking infrastructure and pedestrian traffic that would support private investment in surrounding properties toward implementing the WBUV Specific Plan its is goal of creating a vibrant downtown.</p>
City of Seaside	The Projects at Main Gate Specific Plan	<p>This regional mixed-use project is planned on approximately 56 acres at the entrance of the former Fort Ord Army Base off of Light fighter Drive and adjacent to the expanding California State University Monterey Bay (CSUMB) campus. The proposed mixed-use project will feature approximately 500,000 sq. ft. of open-air retail and entertainment space. Other project components include a 250 room hotel and conference center.</p>	<p>This project is one of the Economic Opportunity sites identified in the City's Economic Opportunity Plan. This gateway project would create jobs and generate revenues for the City.</p> <ul style="list-style-type: none"> • This project will support the reuse of a closed military base.
City of Seaside	Seaside East Conceptual Master Plan	<p>The Seaside East Conceptual Master Plan seeks to focus more intensive, high traffic generating uses along the northerly portion of General Jim Moore Boulevard and along Eucalyptus Road. Proposed uses include a 70 acre Trade and Exposition District that would</p>	<p>This project would establish economic development opportunity sites to attract businesses to Seaside that provide higher paying jobs and generate revenues for the City.</p>

<u>Applicant</u>	<u>Project Name</u>	<u>Brief Project Description</u>	<u>Anticipated Economic Benefit</u>
		include a regional serving facility to accommodate trade shows, large conferences and special events in addition to conference-related facilities including hotels, restaurants and other amenities. Approximately 55 acres would be designated for Business Park and Employment Development that would provide a variety of job-producing flexible office and light industrial uses that could included CSUMB entrepreneurial start -ups, medical offices and research, green technology, and other similar innovative businesses.	
City of Soledad	Los Coches Adobe Utilities	Extending municipal water and sewer lines to incorporated island for development of commercial uses and Adobe Visitors Center	Facilitate development of the Adobe site, which would allow for construction of an 84 unit hotel, restaurant, and other ancillary tourism facilities and open the closed Adobe site to the public.
City of Soledad	North Highway 101 Interchange	Reconstruction of interchange and extension of Gabilan Drive	This infrastructure is required to allow development of a 40 acre commercial shopping center site planed in the northwest area of Soledad
City of Soledad	Pinnacles Parkway	146 Bypass, secondary artery from main commercial area to rest of city	Makes development of significant retail commercial and industrial possible on approximately 60 acres of underutilized or vacant property.
City of Soledad	South Highway 101 Interchange	Improvements to existing interchange	Allow development of vacant 14-acre property for retail commercial uses.
County of Monterey	Firestone Business Park Sewer Line Extension	The existing Firestone Business Park has approximately 690,000 sqft available but unusable due to septic system constraints. The proposed project would connect the business park to the City of Salinas wastewater treatment plant.	This infrastructure is required to allow the continued conversion of a former tire manufacturing plant to new industrial uses that require more sewer capacity than is currently available.
County of Monterey	Laguna Seca Road Improvements and facilities upgrades	Road improvements to facilitate increased use of existing County facilities.	Make public improvements to existing County facilities to better serve visitors and generate jobs through automotive repair, research and development of electric vehicles.

<u>Applicant</u>	<u>Project Name</u>	<u>Brief Project Description</u>	<u>Anticipated Economic Benefit</u>
County of Monterey	River Road Wine Corridor	There are a variety of projects that are part of the overall River Road Wine Corridor concept including: road improvements (quantified by a previous EDA planning grant) and wine industry business park.	This concept is an attempt to capture the value added production of wine grapes grown in the County but lost to other regions. This leakage is estimated at 90% of the potential value. Development of the corridor is expected to support the private development of additional visitor serving amenities
County of Monterey	Water Tunnel	Underground connection between Lake Nacimiento and Lake San Antonio to balance reservoir supply and retain storage capacity.	Capturing and retaining additional rainwater runoff is essential to all aspects of the County's economy.
California State University – Monterey Bay	EDA University Center	To build capacity of CSUMB and partnerships with other universities to successfully complete to be a EDA University Center for the Central Coast of California.	To assist local governments and non-profit organizations in planning and implementing regional economic development strategies and projects, such as training, commercialization of research services, business counseling services and research.
California State University – Monterey Bay	Fostering entrepreneurship and innovation ecosystem	To develop support for entrepreneurs and innovators with training, workshops, competitions, incubator, accelerator, shared workspaces and angel funding with local partnerships in private, non-profit and public organizations.	To increase the number of successful entrepreneurs and jobs in the County by increasing the resources, activities and investors that support entrepreneurs and innovators.
Fort Ord Reuse Authority	Building Removal Business Plan	There are approximately 80 acres of land designated for mixed-use / retail that are occupied by 26 buildings that need to be removed before redevelopment can take place. This project will develop a detailed cost estimate and guidelines for the safe removal of these buildings. The removal plan will also address salvage values and materials reuse.	FORA estimates that the redevelopment of this property could generate upwards of \$400 million in private investment in addition to the creation of new job opportunities. <ul style="list-style-type: none"> • This project will support the reuse of a closed military base.
Fort Ord Reuse Authority	South Boundary Road Improvement Project	This project is to upgrade South Boundary Road to a 2-lane arterial standard between General Jim Moore Blvd and approximately Rancho Saucito entrance to the existing Ryan Ranch Business Park. The improvements will also include a short stretch of General Jim Moore that were not made with previous EDA assistance.	This project will improve transportation access to an existing business park and open up additional property on the former Fort Ord and within the City of Monterey for commercial and industrial development. <ul style="list-style-type: none"> • This project will support the reuse of a closed military base.

CEDS Plan of Action

The Comprehensive Economic Development Strategy relied on the findings developed by consulting group Stanford Research Institute International or SRI for short. SRI began to categorize and prioritize economic opportunity area to determine how they should be integrated into a future economic strategy. In selecting specific opportunities for deeper analysis, SRI applied a number of criteria.

Selection Criteria for Recommended Economic Opportunities

- We favored opportunities that appeared to have greater employment impact, and where stakeholders had indicated that there was likely to be greater success by leveraging existing resources in the County's economy.
- We favored opportunities that promised in some way to transform the region's economy by moving the County into higher-value markets with greater potential revenues for both business and government, and higher wages for employees.
- We favored opportunities that could produce real synergies between the economic "pillars" of the County—agriculture, tourism and hospitality, research and education, and small and community-based business. The synergies would result from two pillars interacting so that both become more competitive and more dynamic, rather than one gaining at the expense of another.
- We favored opportunities in which the County government can play a significant role, both in providing resources and in collaborating more effectively with other stakeholders. In these opportunities, the County can direct development towards one or more municipalities facilitate development through better management of County-owned land and assets, support efforts to attract new investment and obtain federal government funding, and act as a convener of key stakeholders. Opportunities which can be pursued by the private sector alone, or by a limited number of stakeholders, should rightly be the responsibility of those entities, with ancillary support from the County.

We determined that four opportunity areas meet the criteria described above, and seem to offer a combination of relatively quick pay-off and unique regional advantage based off of the four basic industry groups prevalent in the Monterey Economy that form the "Pillar Industries" of the economy. The base industry or pillar groups are displayed in the left column while the new opportunity industry sectors are displayed in the column on the right in the graphic below.

The first two opportunity areas are more near-term in nature, while the second two will require more sustained, long-term investment.

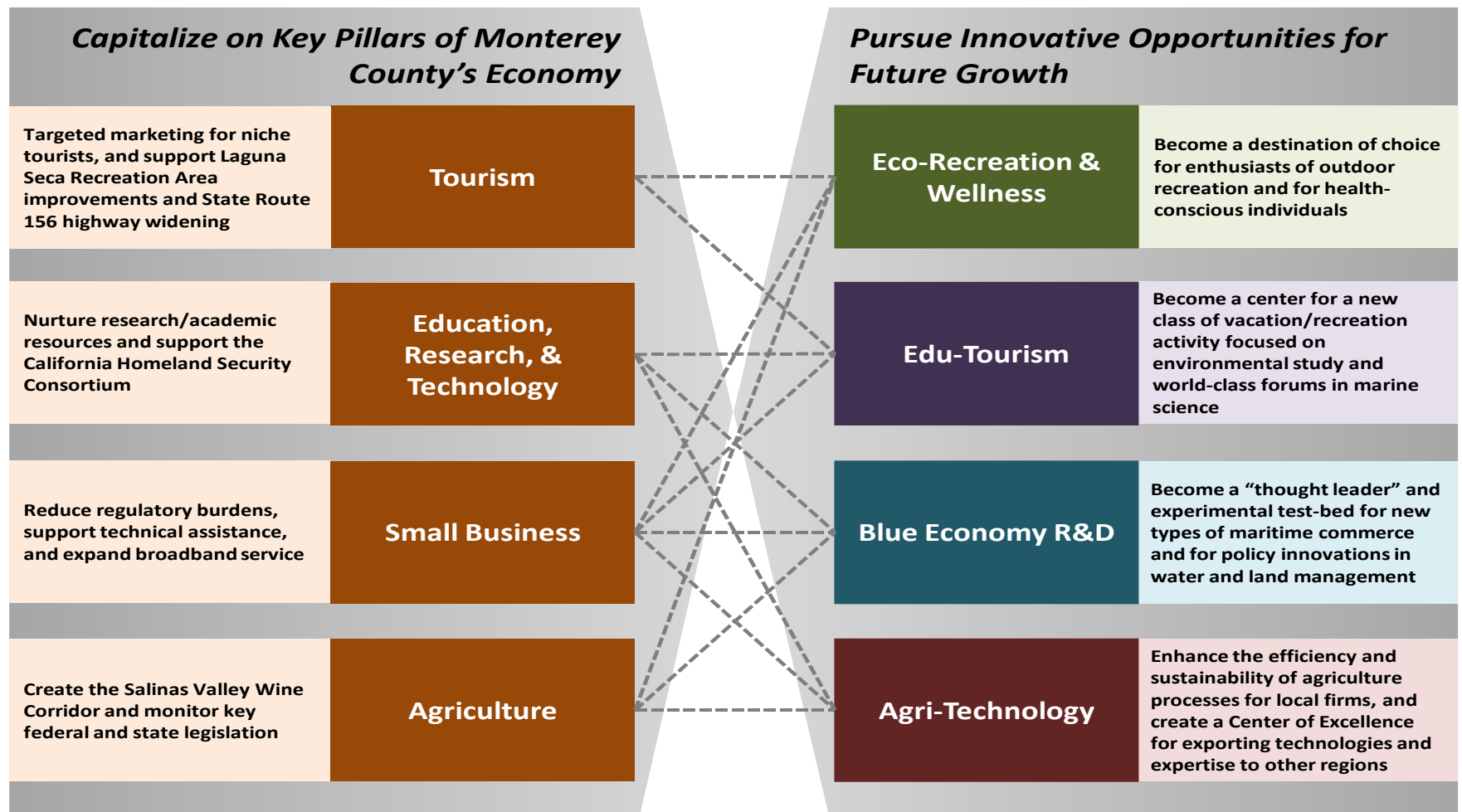
- **Eco-recreation and wellness:** Emphasizing both the natural beauty and major agricultural capabilities (vegetables and wine) of the County in developing new offerings in tourism and recreation for County visitors (short-term immediate investment required).
- **Edu-tourism:** Coordinating public outreach by the County's many institutions for higher education and scientific research into unique packages that integrate learning and exploration of the County's natural environment to expand options for visitors (short-term immediate investment required).

- **“Blue Economy” Research & Development:** Applying the knowledge and expertise of the marine research community to inform local industry activities, generate new technologies for commercialization, and enable Monterey County to become a test-bed for innovative new policies and practices in marine environmental management (requires longer term investment).
- **Agri-Technology:** Leveraging the capabilities of universities and research institutes to expand and enhance the global competitiveness of the Monterey County agricultural sector (requires longer term investment).

A partial list of partners, current and prospective areas where these initiatives could be pursued, visitor attractions and resources, and opportunity sites are included in Appendixes 3-6.

Recommended Opportunities:

A Vision for Economic Development In Monterey County



Eco-Recreation & Wellness

Objective: Convince visitors to extend periods of stay in the County and spend more time and money in the region by promoting the integration of the County’s natural environment and assets with tourism and hospitality offerings.

Impact: Become a destination of choice for enthusiasts of outdoor recreation and for health-conscious individuals

Initiative 1

Marketing Monterey’s holistic travel experiences — Leveraging products and services across sectors to create unique wellness travel experiences

Monterey already offers myriad wellness assets (eco-recreation, natural/outdoor assets, spas, arts & culture, and farms/wineries/cuisine) that are well suited to creating the holistic, authentic, and local experiences desired by a new breed of consumers. A new marketing approach is needed to combine these components to create compelling holistic travel experiences for wellness-minded travelers at different price points, for both corporate and leisure markets. This effort will require forming strategic partnerships across the tourism, hospitality, wellness, agriculture, and related sectors.

Potential Activities:

- Create and market “wellness itineraries”
- Create a “wellness” section/portal on the MCCVB website
- Create an integrated booking system for wellness vacations
- Create a comprehensive inventory of wellness assets
- Create a few travel packages at different price points
- Provide cross-industry training for operators/front-line workers in the philosophy of wellness and wellness offerings

Initiative 2

Branding – Positioning Monterey as a recognized sustainable and wellness destination

As a longer-term initiative, Monterey may want to consider branding itself as a true sustainable and wellness destination. This effort may require some investment and structural changes. While Monterey does have significant assets to position itself as a sustainable and wellness destination, some claim that it is falling behind the curve. Benefits would include attracting more green meetings and becoming eligible for high-profile global tourism awards.

Potential Activities:

- Work toward sustainable destination accreditation through United Nations Global Sustainable Tourism Council by addressing issues such as water management, sustainable tourism strategy, and visitor management.
- Incorporate best practices from other wellness destinations, such as criteria/guidelines for hotels to cater to wellness-minded tourists.

Edu-Tourism

Objective: Create a new and unique value proposition to visitors in various categories, by promoting the development of programs, activities, and facilities, which integrate the region's intellectual assets in marine and environmental sciences with tourism and hospitality.

Impact: Enhance the visibility of the County as the center for a new class of vacation and recreation activity focused on environmental study and world-class forums in marine science.

Initiative 1

Create a steering committee to coordinate and generate edu-tourism programs in Monterey

Potential edu-tourism programs would have to be structured and marketed very carefully. Better coordination is needed to determine which local researchers are suitable for leading such programs, and how their availability should be managed. A steering committee dedicated to these efforts would help coordinate among the tourism, research, and education institutions, and would include representatives from each of these areas. MCCVB could create a working group with the Monterey Bay Ocean Research Consortium or a similar forum of higher education institutions, and generate a catalog of existing programs with ideas for new programs.

Initiative 2

Adopt a global executive education model for Monterey's language and international policy schools

Enabled by the latest communication technologies, the recent trend for the executive education market is to move away from the local, part-time education model to a global one involving a network of partnerships with other institutions worldwide. This extends the reach and demand of the educational program for executive candidates, who are able to gain a more diverse education and on-campus experiences. Complemented by Internet-based delivery of material, executives will be able to engage in shorter periods of full-time study on campus. MIIS, NPS, and Panetta Institute for Public Policy could apply a similar model to target high-level policymakers, analysts, and other professionals. MIIS has already developed several partnerships, while the Panetta Institute has only one with CSUMB.

Initiative 3

Expand the Open House activities at MBARI and MLML to become a larger marine technology showcase

Currently, MBARI and MLML host public open house events with science exhibitions, technology demonstrations, research videos and presentations, and other family activities. However, there is no major event that provides an opportunity for other research institutions in Monterey, such as UCSC and NPS, to showcase their latest research findings and technologies. Creating a larger technology showcase may encourage more cluster development and interactions within the marine research industry in Monterey, as well as attract more edu-tourists and business executives who are more willing to come to a scaled event displaying the research findings and technologies of an entire region.

Initiative 4

Create a research center providing short-term housing and meeting space for visiting students and researchers

Several institutions of higher education noted that they have limited capacity to host visiting scholars and graduate students, due to the lack of affordable short-term housing. In addition, the County's current meeting facilities at the Monterey Conference Center and at Asilomar are not configured well for extended scientific meetings, and are in need of updating. The County can support upgrades to existing facilities but also create a new "mini-campus" that can be shared by several institutions for housing visitors. The Center for Ocean Solutions in Monterey could help with coordination and planning in this effort.

Initiative 5

Explore partnerships between UCSC, veterinary schools, and Monterey Aquarium

Monterey Bay Aquarium should explore partnerships with other schools in the area to enhance the research and teaching capabilities of all parties involved. Benefits could include opening up new areas of study for students, enhancing students' access to direct practice on marine animals, and accessing complementary faculty expertise. The nearest veterinary school is the University of California, Davis School of Veterinary Medicine, and the Monterey Aquarium could launch partnership discussions of opening a joint teaching hospital. Other partnerships beyond veterinary medicine should also be explored.

Blue Economy R&D

Objective: Position Monterey County as a global leader in business and civic approaches to redefine the interface between humans and marine resources, by promoting new types of research, technology commercialization, and policy development.

Impact: Encourage the County to become a “thought leader” and experimental test-bed for new types of maritime commerce and for policy innovations in water and land management.

Initiative 1

Research-Technology Collaborative: A regional intermediary to support collaboration and technology commercialization and development

Strong coordination and collaboration is critical to support a Marine Research and Innovation initiative in the region. A new Research Technology Collaborative would serve multiple roles in supporting this effort, including ramping up communication and information-sharing across regional marine research institutions; building formal mechanisms for collaboration, community engagement, and technology transfer; and seeding development of a technology-based marine cluster in Monterey Bay. The RTC is not intended to replace or duplicate the efforts of any existing organization, but instead to fill gaps in the region’s marine innovation ecosystem and to fund, support, and coordinate inter-institutional activities to that end.

Initiative 2

Solutions-Oriented Growth: Monterey County as a pilot-scale policy laboratory

The Monterey Bay area has a number of significant assets that make it an ideal setting for becoming a pilot-scale “policy laboratory,” focusing on crafting new environmental policy solutions based on near-real-time scientific data and evidence. Key assets include the sheer concentration of marine and environmental science experts and institutions, the unique ecosystem of the Bay, the heavy presence of sensors in the Bay region, pioneering work in ecosystem-based management and marine spatial planning, and existing multi-disciplinary research programs on policy and the environment. The region’s regulatory authorities research community, and the private sector to develop and test new approaches to environmental management and mitigation, and to develop programs that educate and inform regulators and businesses about new concepts in environmental regulation. This process could make Monterey a destination where other governments can send representatives to learn about these new approaches and how they should be tailored for their home geographies.

Initiative 3

Regional Venture Creation: Promoting research commercialization of marine technology

As a center of specialized, engineering-oriented applied research, Monterey County has a rare opportunity to become the home for spin-off technology development based on the results of research performed at those institutions. Currently, the Monterey region’s technology commercialization opportunities are hampered by several challenges: the region does not have a single research institution with sufficient scale to sustain its own technology commercialization center, and the area also lacks a community of local investors and a deep technical workforce. Collective activity is needed to address these challenges, and the Research Technology Collaborative can play an important role

by coordinating and supporting research and commercialization activities across multiple institutions. In addition, sustaining a marine technology commercialization ecosystem will require Monterey Bay research institutions to internalize the goals of technology development and commercialization – not necessarily as their primary objective, but as an important priority. Creating an institutional culture that values entrepreneurship and commercialization will help to ensure that promising ideas are identified and pursued, generating the steady stream of high-quality research and innovation necessary for this endeavor to succeed.

Agri-Technology

Objective: Enhance and extend the County's formidable competitive advantage in agriculture by supporting the development of a broad initiative in applied research and development, focused on science and technology to improve the processes of farming and harvesting in efficient and sustainable ways.

Impact: Enhance the efficiency and sustainability of agriculture processes for local firms, and create a Center of Excellence for exporting technologies and expertise to other regions.

Initiative 1

Create a Center of Excellence for exporting agri-technologies and expertise to other regions

A joint effort to collaborate in pre-competitive R&D would help maintain the competitive strength of the agricultural industry in Monterey County in the face of several long-term challenges. The first step is to conduct initial scoping for a potential Center of Excellence in applied agricultural R&D. Key players on the industry side would be the growers, shippers, and related agricultural service companies. Key players on the research side would include the Agricultural Business & Technology Institute at Hartnell College, the University of California Cooperative Extension Monterey County, California State University Monterey Bay, and the Steinbeck Innovation Center initiative. Due to resource constraints, the activities of the pre-competitive alliance could be integrated with the Regional Technology Collaborative mentioned in the previous section (such as for technology commercialization projects). The Center of Excellence would help ensure the competitiveness of a major employer in the County, and also shift farming to become more visibly based on innovative new technologies that could become an export industry for the region.

Performance Measures

Monterey County has adopted individual department performance measures while the Economic Opportunity Committee has adopted annual measure of success in order to track whether performance is improving or decreasing over time. The following performance measures have been combined to create universal measures that may be used by the department, the committee, the Board of Supervisors and by each city and/or community who we partner with

The straight-line measurement is the number of basic jobs created, the dollar amount created by the new investment, and the measurement of private sector dollars leveraged by public sector assistance:

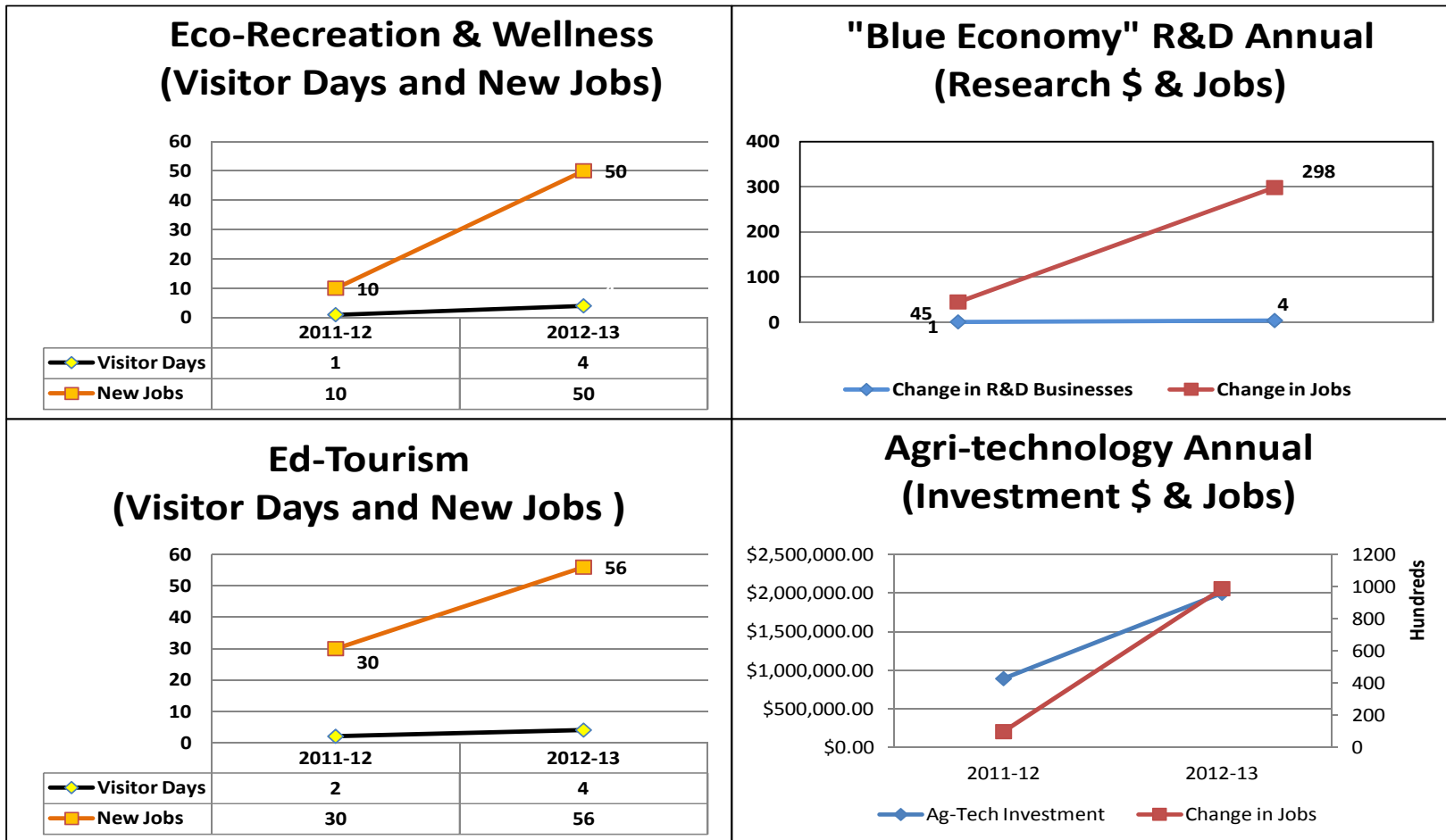
1. Number of jobs created, expanded or retained after implementation of CEDS
2. Number and types of investments, total dollar amount invested and undertaken in the region
3. Number of projects or private sector investment leveraged in the region after the implementation of the CEDS
4. Positive changes in the economic environment of the region

In addition, the Economic Opportunity Committee will measure performance for each of the four (4) Economic Opportunity Areas developed by Stanford Research Institute in the form of a matrix provided on the page below.

The SRI “*Recommended Opportunities?*” are contained in this document as long-term opportunities, or project areas, requiring greater than five (5) years of sustained work and funding to realize their economic potential as an intuitive and to build off of our four existing “pillar” industries for Monterey County.

Economic Opportunity Index

Example of Annual Measurement Matrix



Appendix 1

Higher Education & Research Resources in Monterey County

California State University Monterey Bay

The California State University Monterey Bay campus held its first class in August 1995. Since that time it has grown to approximately 5,700 students and offers 22 undergraduate degrees, 7 Graduate degrees and 4 Teaching Credentials. Approximately 37% of CSUMB undergraduates are from Monterey, San Benito or Santa Cruz County.

Majors

- Biology B.S.
- Business Admin B.S.
- Cinematic Arts & Technology B.A.
- Collaborative Health & Human Services B.A.
- Communication Design B.S.
- Computer Science & Information Technology B.S.
- Environmental Science, Technology & Policy B.S.
- Environmental Studies B.A.
- Global Studies B.A.
- Human Communication B.A.
- Japanese B.A.
- Kinesiology B.S.
- Liberal Studies B.A.
- Marine Science B.S.
- Mathematics B.S.
- Music B.A.
- Nursing B.S.N.
- Psychology B.A.
- Social & Behavioral Sciences B.A.
- Spanish B.A.
- Visual & Public Art B.A.
- World Languages & Cultures B.A.
- Education M.A.
- Master of Business Administration
- Instructional Science & Technology, M.S.
- Management and Information Technology M.S.
- Marine Science M.S.
- Master of Social Work

Graduate Degrees

- Applied Marine & Watershed Science M.S.

Teaching Credentials

- Single Subject
- Multiple Subject
- Special Education
- CalStateTEACH

Community Colleges

Monterey County is served by two Community College Districts, Hartnell in Salinas and Monterey Peninsula College (MPC) in Monterey. Together these schools offer certificates and associates degrees in more than 140 career areas and subjects. A list of the certificates and degrees offered at Hartnell and MPC can be found in the following Appendix.

Monterey Institute of International Studies

The Monterey Institute of International Studies was founded in 1955 and today is affiliated with Middlebury College in Vermont. MIIS's emphasis is on graduate level education and language education. The degrees are in areas as diverse as Conference Interpretation to International Environmental Policy and Nonproliferation and Terrorism Studies.

Bachelor and Master's Degrees in International Studies:

Graduate Degrees:

- Conference Interpretation;
- International Education Management
- International Environmental Policy
- International Policy Studies
- Teaching a Foreign Language
- Teaching English as a Second Language; Translation
- Translation & Interpretation
- Translation & Localization Management
- Public Administration (MPA)
- MBA in International Management

Certificate programs:

- Nonproliferation Studies
- Policy & Management
- Short-term Teacher Training Programs
- Terrorism Studies
- Translation & Interpretation Short Programs

Development Project Management Institute Programs include:

- Executive Education
- Frontier Market Scouts
- Global Trade & Development.
- Language Teaching Specializations

Monterey Bay Aquarium Research Institute

Research conducted at the Monterey Bay Aquarium Research Institute primarily falls into the following areas:

Biology and ecology

- Benthic ecology
- Biogeochemistry
- Coastal ocean processes
- Microbial oceanography
- Midwater ecology

- Molecular ecology
- Molecular microbial ecology
- Pelagic-benthic coupling

Chemistry

- Chemical sensors

- Greenhouse gases

Geology

- Canyon processes
- Submarine volcanism

In order to accomplish the research goals of MBARI, the organization as established the following specialized engineering groups:

- Software
- Platforms
- Instrumentation
- Support Engineering
- Manufacturing

Research Vessels

- Western Flyer – 117 foot, small water plane area twin-hull vessel that was specifically designed and constructed for MBARI to support ROV operations
- Rachel Carson – 135 foot research vessel that is used primarily to support the Ventana ROV and Dorado Autonomous Underwater Vehicles (AUVs)
- Paragon – 36 foot research vessel designed primarily for near shore work
- Ventana ROV (Remotely Operated Vehicle)
- Tethys Class AUV

Moss Landing Marine Laboratory

Graduate Degrees:

- Geological oceanography
- Ichthyology
- Chemical oceanography
- Invertebrate zoology
- Phycology
- Vertebrate ecology
- Biological oceanography
- Physical oceanography

Three research vessels

- Point Sur – 135 foot research vessel, part of University National Oceanographic Laboratory System (UNOLS) fleet
- John H. Martin – 56 foot vessel primarily used in the Monterey Bay
- Sheila B. – 30 foot shallow draft vessel used primarily in the Elkhorn Slough

Naval Postgraduate School

The mission of the Naval Postgraduate School is to provide relevant and unique advanced education and research programs to increase the combat effectiveness of commissioned officers of the Naval Service to enhance the security of the United States. In support of the

foregoing, and to sustain academic excellence, foster and encourage a program of relevant and meritorious research which both supports the needs of Navy and Department of Defense while building the intellectual capital of Naval Postgraduate School faculty.

Graduate Degrees

- Applied Mathematics
- Electrical and Computer Engineering
- Engineering Acoustics
- Mechanical and Astronautical Engineering
- Meteorology
- Oceanography
- Physics
- Space Systems
- Systems Engineering

Appendix 2

Community College Certificate & Degree Programs

	Hartnell		MPC			Hartnell		MPC	
	Associates Degree	Certificate	Associates Degree	Certificate		Associates Degree	Certificate	Associates Degree	Certificate
Administration of Justice	AS	X	AS		Business Office Technology				
Corrections				X	Accounting and Bookkeeping		X	AS	X
Law Enforcement			AS		Entrepreneurship			AS	X
Agriculture and Industrial Technology					Entry Level Office Level 2				X
Industrial Mechanics		X			Entry Level Office Worker				X
Industrial Technician		X			Information Processing	AS	X		
Agriculture					International Business			AS	X
Business	AS	X			Business Office Technology:			AS	X
Food Safety		X			Secretarial			AS	X
Production	AS	X			Chemistry	AS		AS	
Alcohol and Drug Abuse Counseling	AA	X			Chicano Studies	AA			
Anthropology			AA		CISCO Networking and Security Professional				X
Art	AA		AA	X	Communications Studies	AA			
Astronomy	AS				Computer Information Systems			AS	
Automotive Technology			AS	X	Computer Science Option	AS	X	AS	
Advanced Automotive Technician		X			Computer Software Applications			AS	X
Automatic Transmissions				X	Digital and Web Design Option	AS	X		X
Automotive Shop Management	AS	X			Network and Security Option	AS	X	AS	
Brake Systems				X	Construction				
General Automotive Mechanics	AS	X			Construction Management		X		
Heavy Duty Diesel Technology	AS	X			Green Building		X		
Standard Transmissions				X	Sustainable Design	AS	X		
Steering and Suspension				X	CSU/General Education Breadth		X		X
Biology	AS		AS		Cultural History of Monterey County			AA	X
Business Administration	AS		AS		Dance			AA	

	Hartnell		MPC			Hartnell		MPC	
	Associates Degree	Certificate	Associates Degree	Certificate		Associates Degree	Certificate	Associates Degree	Certificate
Dental Assisting			AS	X	General Studies				
Digital Arts	AS	X			Ethnic Groups in the United States	AA			
Drafting and Design Technology	AS	X			Humanities	AA			
Architectural Emphasis		X			Language and Rationality	AA			
Computer-Aided Drafting and Design				X	Natural Science Emphasis	AA			
Mechanical Emphasis		X			Social and Behavioral Sciences	AA			
Early Childhood Education	AS	X	AS	X	Geology			AS	
Earth Science	AS				Graphic Arts			AA	X
Economics			AA		History	AA		AA	
Elementary School Teacher Preparation	AA				Hospitality				
Emergency Medical Technician I: Basic Training				X	Hospitality Supervision				X
Engineering	AS		AS		Hospitality Management			AA	
Engineering Technology: Mechatronics				X	Hospitality Operations			AA	X
English	AA		AA		Human Services			AS	X
English as a Second Language Advanced				X	Interior Design			AA	X
English as a Second Language Intermediate				X	Green Interiors				X
Basic Skills				X	Liberal Arts				
Creative Writing				X	Anthropology	AA			
Great Books				X	Art and Design	AA			
Essential Computer Skills				X	Communication	AA			
Ethnic Studies			AA		Culture and Society	AA			
Family and Consumer Science			AA		History	AA			
Family Research Studies (Genealogy)			AA	X	Humanities	AA			
Fashion Design			AA	X	Languages and Literature	AA			
Fashion Merchandising			AS	X	Performing Arts	AA			
Fashion Production			AS	X	Philosophy	AA		AA	
Fire Protection Technology			AS	X	Political Science	AA		AA	
Fire Command				X	Psychology	AA			
Fire Instructor				X	Sociology and Social Sciences	AA			
Fitness Instructor Training			AS	X	Linguistics				X

	Hartnell		MPC			Hartnell		MPC	
	Associates Degree	Certificate	Associates Degree	Certificate		Associates Degree	Certificate	Associates Degree	Certificate
Massage Therapy			AS	X	Pre-Nursing			AA	
Mathematics	AS		AS		Pre-Occupational Therapy			AA	
Medical Assisting			AS	X	Pre-Physical Therapy			AA	
Medical Insurance and Coding Specialist			AS	X	Psychology	AA		AA	
Medical Office Administration			AS	X	Real Estate	AS	X	AS	X
Music	AA		AA	X	Respiratory Care Practitioner	AS			
Nursing					Restaurant Management			AS	
Registered Nursing	AS		AS		Baking and Pastry Arts				X
Vocational Nursing		X			Cooking School				X
Nutrition and Food				X	Food Service Management				X
Oceanography			AS		Retail Management				X
Ornamental Horticulture			AS	X	Social Sciences	AA			
Parks and Recreation			AS	X	Sociology	AA		AA	
Photography	AA	X		X	Spanish	AA			
Physical Education Aide			AS		Studio Arts	AA			
Physical Education: Kinesiology	AS				Theatre Arts	AA		AS	X
Physics	AS		AS		Welding Technology	AA	X		
Physical Education			AA		Women's Studies			AA	
Pre-Dental Hygiene			AA		World Languages			AA	

Appendix 3

Economic Opportunity – Partners

	-Ag Technology	Blue- Economy R&D	-Eco & Recreation Wellness Tourism	-Edu Tourism
Partner Organizations				
Agriculture and Land-Based Training Association (ALBA)	●			
Arts Council for Monterey County (ACMC)				●
Association of Monterey Bay Area Governments (AMBAG)		●		
Big Sur Chamber of Commerce			●	●
Brandman College				●
CA State University at Monterey Bay (CSUMB) Institute for Innovation and Economic Development	●	●		
CA State University at Monterey Bay (CSUMB) School of Business		●		●
CA State University at Monterey Bay (CSUMB) Small Business Development Center	●	●	●	●
CA Welcome Center			●	●
California Rural Development Corporation	●	●	●	●
Carmel Chamber of Commerce				●
Carmel Valley Chamber of Commerce			●	●
Center for Employment Training (CET)	●			
Central Coast College			●	
Central Coast Marketing Team	●	●		
Community Hospital of the Monterey Peninsula (CHOMP)			●	
Defense Language Institute (DLI)				●
El Pajaro Community Development Corporation (CDC)	●			
Fort Ord Reuse Authority (FORA)			●	●
Grower-Shipper Association	●			
Hartnell College	●		●	

Partner Organizations	-Ag Technology	Blue- Economy R&D	-Eco & Recreation Wellness Tourism	-Edu Tourism
Hopkins Marine Station		●		
Mee Memorial Hospital			●	
Mission Trails Regional Occupational Program				●
Monterey Bay Aquarium Research Institute (MBARI)		●		
Monterey Bay Area International Trade Association (MBAITA)		●		
Monterey Bay Unified Air Pollution Control District (MBUAPCD)	●	●		
Monterey College of Law			●	●
Monterey County Agricultural Commissioner	●			
Monterey County Business Council Competitive Cluster Project	●	●	●	●
Monterey County Convention & Visitor Bureau (MCCVB)			●	●
Monterey County Economic Development Department	●	●	●	●
Monterey County Farm Bureau	●			●
Monterey County Film Commission (MCFC)				●
Monterey County Health Department - Environmental Health	●		●	●
Monterey County Hospitality Association (MCHA)				●
Monterey County Resource Management Agency	●	●	●	●
Monterey County Vintners & Grower Association (MCVGA)	●			●
Monterey Institute for International Studies (MIIS)		●		●
Monterey Peninsula Chamber of Commerce			●	●
Monterey Peninsula College		●	●	
Moss Landing Marine Laboratory (SJSU)		●		
National Oceanographic and Atmospheric Administration - Monterey Bay Marine Sanctuary		●	●	●
Natividad Medical Center (NMC)			●	
Naval Post Graduate School (NPS)		●		
NPS - Fleet Numerical Meteorology and Oceanography Center		●		
NPS - Naval Research Laboratory (NRL)		●		

Partner Organizations	-Ag Technology	Blue- Economy R&D	-Eco & Recreation Wellness Tourism	-Edu Tourism
Pacific Gas & Electric	●	●		
Salinas Valley Chamber of Commerce	●			●
Salinas Valley Memorial Healthcare System (SVMHS)			●	
Steinbeck Innovation Foundation/Center	●			
Transportation Agency for Monterey County (TAMC)				●
University of California Santa Cruz, Monterey Bay Education in Science and Technology (UCMBEST)		●		

Appendix 4

Economic Opportunity – Current and Prospective Centers of Activity

Current/Prospective Geographic Centers of Activity	-Ag Technology	Blue- Economy R&D	-Eco & Recreation Wellness Tourism	-Edu Tourism
Big Sur			●	●
Carmel Valley Village			●	●
Castroville	●			●
City of Carmel				●
City of Del Rey Oaks				●
City of Gonzales	●			●
City of Greenfield	●			●
City of King (King City)	●			●
City of Marina	●	●		●
City of Monterey		●		●
City of Pacific Grove		●		●
City of Salinas	●			●
City of Sand City				●
City of Seaside			●	●
City of Soledad	●			●
Del Monte Forest/Pebble Beach			●	●
Moss Landing		●	●	●
Spreckels	●			●

Appendix 5

Economic Opportunity – Visitor Attractions & Resources

	-Ag Technology	Blue- Economy R&D	-Eco & Recreation Wellness Tourism	-Edu Tourism
Attractions				
17-Mile Drive		☐		●
AT&T Pro-Am Golf Tournament	☐			●
Big Sur State Parks	☐		●	●
Cannery Row	☐	☐		●
Carmel Mission				●
Carmel Valley Wine Corridor	☐			●
Concourse d' Elegance / Car Week	☐			●
Elkhorn Slough National Estuarine Research Reserve			●	●
Fishermen's Wharf	☐			●
Fort Ord National Monument	☐		●	●
Laguna Seca County Park			●	●
Laguna Seca Racetrack				●
Lake San Antonio	☐		●	●
Mission San Antonio	☐			●
Monterey Bay Aquarium	☐			●
Monterey Blues Festival				●
Monterey Jazz Festival				●
Pinnacles National Park			●	●
Point Lobos		☐	●	●
River Road Wine Corridor	☐			●
Salinas Rodeo	☐		●	●
Soledad Mission				●
Whale Watching			●	●

Appendix 6

Economic Opportunity – Current Development Opportunity Sites

Opportunity Sites	-Ag Technology	Blue- Economy R&D	-Eco & Recreation Wellness Tourism	-Edu Tourism
Castroville Industrial Park	●	●	□	□
Fort Ord/County - Abrams-Imjin Commercial	□		●	●
Fort Ord/Marina - MBEST "Triangle"	●	●		□
Fort Ord/Marina - MBEST Business Park	●	●	□	□
Fort Ord/Seaside Main Gate			●	●
Gonzales Business Park	●	●		□
King City - Airport Industrial Park				□
King City - Rava Business Park	●	●		□
Monterey - CTB/McGraw Hill Building	●	●		□
Monterey - Ryan Ranch	●	●		□
Moss Landing - Dolan Road	●	●		□
Moss Landing - Hwy 1 frontage	●	●		□
Pajaro - Railroad Ave Industrial	●			□
Salinas - Airport Industrial Park	●	●		□
Salinas - CTB/McGraw Hill Building	●	●	●	□
Salinas - Firestone Business Park	●	●		□
Salinas - Ottone Business Park	●	●	●	□