California Department of Finance Population Projections

Ray Major
Chief Economist and Chief Analytics Officer

Board of Directors Item 16 | February 28, 2020

CA DOF Population Projections
San Diego County

2007 ~4.5 mil
2017 ~4.0 mil
2014 ~4.0 mil
2020 ~3.7 mil
Differences Between 2017 and 2020 Projections

1. Birth rates continue to decline
2. Life expectancy growing at a slower rate
3. Net migration decreases significantly

CA DOF Population Projections
San Diego County (Jan 1)

- 2017: 3,000,000
- 2020: 3,100,000
- 2025: 3,200,000
- 2030: 3,300,000
- 2035: 3,400,000
- 2040: 3,500,000
- 2045: 3,600,000
- 2050: 3,700,000

- ∆ 2020 = 29,031
- ∆ 2025 = 261,316
- ∆ 2030 = 133,944
SANDAG Products That Use CA DOF Population Projections

- Regional/Sub-regional Growth Forecast
- ABM Model Development
- RTP/SCS
- Output of Travel Model
- TransNet Forecast
- Climate Action Plans
- Social Equity
- Formula Funds
- County Water Authority
- Crime Rates
- RHNA
- Service Bureau

TransNet Sales Tax Forecast

- $14B (4.4mil Pop)
- $9.2B (4.0mil Pop)
- $8.6B (3.7mil Pop)
Comparison of DOF Population Projections

<table>
<thead>
<tr>
<th>January 1*</th>
<th>DOF 2017</th>
<th>DOF 2020</th>
<th>Difference</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population 2050</td>
<td>3,989,372</td>
<td>3,728,056</td>
<td>-261,316</td>
<td>-6.6%</td>
</tr>
</tbody>
</table>

*adjusted from fiscal year to calendar year

---

DOF 2050 Population Projections*

<table>
<thead>
<tr>
<th>Area</th>
<th>Current (Jan 1, 2019)</th>
<th>2050 POP (DOF 2017)</th>
<th>2050 POP (DOF 2020)</th>
<th>Change</th>
<th>2019-2050 % Change (DOF 2020)</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kern County</td>
<td>916,464</td>
<td>1,343,930</td>
<td>1,162,519</td>
<td>-181,411</td>
<td>26.8%</td>
<td>-13.5%</td>
</tr>
<tr>
<td>San Bernardino County</td>
<td>2,192,203</td>
<td>2,969,228</td>
<td>2,608,411</td>
<td>-360,817</td>
<td>19.0%</td>
<td>-12.2%</td>
</tr>
<tr>
<td>Sacramento County</td>
<td>1,546,174</td>
<td>2,097,362</td>
<td>1,873,096</td>
<td>-224,267</td>
<td>21.1%</td>
<td>-10.7%</td>
</tr>
<tr>
<td>Los Angeles County</td>
<td>10,253,716</td>
<td>11,272,222</td>
<td>10,084,975</td>
<td>-1,187,247</td>
<td>-1.6%</td>
<td>-10.5%</td>
</tr>
<tr>
<td>Santa Clara County</td>
<td>1,954,286</td>
<td>2,631,372</td>
<td>2,365,180</td>
<td>-266,192</td>
<td>21.0%</td>
<td>-10.1%</td>
</tr>
<tr>
<td>Riverside County</td>
<td>2,440,124</td>
<td>3,395,129</td>
<td>3,065,058</td>
<td>-330,071</td>
<td>25.6%</td>
<td>-9.7%</td>
</tr>
<tr>
<td><strong>CA Statewide</strong></td>
<td><strong>39,927,315</strong></td>
<td><strong>49,055,785</strong></td>
<td><strong>44,827,189</strong></td>
<td><strong>-4,228,596</strong></td>
<td><strong>12.3%</strong></td>
<td><strong>-8.6%</strong></td>
</tr>
<tr>
<td>Contra Costa County</td>
<td>1,155,879</td>
<td>1,502,599</td>
<td>1,385,233</td>
<td>-117,366</td>
<td>19.8%</td>
<td>-7.8%</td>
</tr>
<tr>
<td>Fresno County</td>
<td>1,018,241</td>
<td>1,353,920</td>
<td>1,248,546</td>
<td>-105,374</td>
<td>22.6%</td>
<td>-7.8%</td>
</tr>
<tr>
<td><strong>San Diego County</strong></td>
<td><strong>3,351,786</strong></td>
<td><strong>3,989,372</strong></td>
<td><strong>3,728,056</strong></td>
<td><strong>-261,316</strong></td>
<td><strong>11.2%</strong></td>
<td><strong>-6.6%</strong></td>
</tr>
<tr>
<td>Alameda County</td>
<td>1,669,301</td>
<td>2,154,012</td>
<td>2,071,626</td>
<td>-82,386</td>
<td>24.1%</td>
<td>-3.8%</td>
</tr>
<tr>
<td>San Francisco County</td>
<td>883,869</td>
<td>1,113,968</td>
<td>1,079,192</td>
<td>-34,776</td>
<td>22.1%</td>
<td>-3.1%</td>
</tr>
<tr>
<td>Orange County</td>
<td>3,222,498</td>
<td>3,615,139</td>
<td>3,624,187</td>
<td>9,048</td>
<td>12.5%</td>
<td>0.3%</td>
</tr>
</tbody>
</table>

* adjusted from fiscal year to calendar year
Guidance from Housing and Community Development Department about effects on the current RHNA process

Modifications to “current” regional growth forecast underway

ABM testing using the revised regional growth forecast

Implementation of new growth forecast numbers

Revised TransNet forecast

QUESTIONS?

Ray Major
Chief Economist and Chief Analytics Officer, SANDAG
ray.major@sandag.org
Impact of the Safer Affordable Fuel-Efficient Vehicles (SAFE) Rule on the 2020 Regional Transportation Improvement Program (RTIP)

Board of Directors Item 18 | February 28, 2020

Relationship Between Plans
2020 RTIP Update Steps

Local Agencies
Projects Programmed

SANDAG
Board Approves

Caltrans
Incorporates into Statewide Program

FHWA

2018 RTIP Amendment

SAFE

SAFE

3
Environmental Review for Transportation Improvement Projects

Board of Directors Item 21 | February 28, 2019

Outline of Presentation

1. Overview of environmental process
2. Examples of projects
3. FAQs
4. Future of CEQA and NEPA
5. Status of *TransNet* environmental work
Environmental Compliance

- CEQA/NEPA Review
- Federal and State Permits
- Construction Compliance
- Post-Construction Mitigation Monitoring

Relationship: Regional Transportation Plan, Regional Transportation Improvement Program, Capital Budget

- RTP - Regional Transportation Plan: Updated every 4 years
- 2018 RTIP Regional Transportation Improvement Program: Updated every 2 years
- 2020 RTIP Regional Transportation Improvement Program (now in transition): Updated every 2 years
- SANDAG Capital Budget: Updated annually
How Projects Move from Vision to Reality

Project Inception to Construction

Planning
- Consider corridor characteristics
- Recommend multimodal strategies
- Develop funding strategies

Environmental
- Scope projects
- Analyze potential environmental impacts
- Select Preferred Alternative

Design
- Complete final engineering
- Acquire right of way

Construction
- Select contractors
- Construct projects

Sample Timeline and Costs

<table>
<thead>
<tr>
<th>Planning</th>
<th>Environmental</th>
<th>Design</th>
<th>Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 3 years</td>
<td>1 - 4 years</td>
<td>2 - 3 years</td>
<td>2 - 3 years</td>
</tr>
<tr>
<td>30 - 40%</td>
<td>30 - 40%</td>
<td>30 - 40%</td>
<td>60 - 70%</td>
</tr>
</tbody>
</table>
**NEPA and CEQA Terminology and Process**

- **Exempt**
- **Negative Declaration**
- **Initial Study**
- **Review for Exemption**
- **Environmental Assessment**
- **Review for Exclusion**
- **Finding of No Significant Impact**
- **Excluded**

### NEPA
- **Notice of Intent**
  - Scoping
  - Draft EIS
  - EPA Filing: Federal Register
- **Notice of Preparation**
  - Scoping
  - Draft EIR
  - State Clearinghouse
  - Public and Agency Review
  - Preparation of Response to Comments
  - Review of Response by Commenting Agencies
  - Final EIR
  - Agency Decision/Findings/ Statement of Overriding Considerations/ Mitigation, Monitoring and Reporting
- **Final EIS**
  - EPA Filing: Federal Register
  - Agency Decision/Record of Decision

### CEQA
- **Initial Study**
- **Draft EIR**
- **State Clearinghouse**
- **Public and Agency Review**
- **Preparation of Response to Comments**
- **Review of Response by Commenting Agencies**
- **Final EIR**
- **Agency Decision/Findings/ Statement of Overriding Considerations/ Mitigation, Monitoring and Reporting**

---

**Exemption**

San Onofre to Pulgas LOSSAN Double Track Project
Mitigated Negative Declarations

Project EIR

South Bay Rapid
Program EIR

Joint EIR/EIS

Mid-Coast Trolley Project
FAQs

- Do EIR/EIS expire?
- What is the cost of an environmental review?
- Who regulates the environmental review process?
- How can environmental review be expedited?

Future of CEQA/NEPA

1. CEQA legal developments
   - SB 743
   - GHG analysis
   - Air quality/human impacts
2. One federal decision
3. Major amendments to NEPA regulations
### TransNet Environmental Work

<table>
<thead>
<tr>
<th>Category</th>
<th>Number of Projects</th>
<th>Total Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environmental Complete, Construction Complete or Fully Funded</td>
<td>32 projects</td>
<td>$158.0 million</td>
</tr>
<tr>
<td></td>
<td>40 projects</td>
<td>$122.0 million</td>
</tr>
<tr>
<td></td>
<td>18 projects</td>
<td>$11.0 million</td>
</tr>
</tbody>
</table>

**Total Funding:**

- $291 million
- $66.9 million
- $149.5 million

---

**Environmental Complete, No Construction (due to funding or decision):**

- $149.5 million

**Currently in Environmental Phase:**

- $66.9 million
TransNet Environmental Work

Environmental Complete, Construction Complete or Fully Funded

Highway/Managed Lanes
32 projects
$158.0 million

- I-5 North Coast: 4 Express Lanes
- I-5 HOV: Manchester Avenue to Palomar Airport Drive
- I-5/Genesee Interchange Improvements
- I-5/Genesee Auxiliary Lane
- SR 11 and Otay Mesa East Port of Entry
- SR 11 and Otay Mesa East Port of Entry: Segment 1 Construction
- SR 11 and Otay Mesa East Port of Entry: Segment 2A and SR 905/125/11 Southbound Connectors Construction
- I-15 Express Lanes South Segment
- I-15 Express Lanes Middle Segment
- SR 178 North/South Double Track
- SR 178 North/South Single Track
- SR 52 Managed Lanes
- SR 52 Widening
- SR 76 Widening
- I-805 South 4 Express Lanes
- I-805 South: 2HOV and Direct Access Ramps
- SR 905/SR 905 to Britannia Boulevard
- SR 905/SR 905 Connectors
- SR 905/125/11 Northbound Connectors
- SR 905/125/11 Southbound Connectors
- SR 125/905 Southbound to Westbound Connector

TransNet Environmental Work

Environmental Complete, Construction Complete or Fully Funded

Transit
40 projects
$122.0 million

- San Ysidro Intermodal Freight Facility
- South Line Rail Freight Capacity
- Mc-Coast Trolley
- SPRINTER: Oceanside-Escondido Light Rail
- SuperLooP Rapid
- I-15 FasTrak®
- I-15 Rapid Transit Stations: Rancho Bernardo, Sabre Springs, and Del Lago
- I-15 Mira Mesa Direct Access Ramp - Rapid
- SR 15 Rapid: Mid-City Centerline Stations
- Downtown Rapid Stations
- I-15 Rapid
- I-15 Rapid Sabre Springs Parking Structure
- South Bay Rapid Maintenance Facility
- I-15 Mira Mesa Transit Station Parking Structure
- Orange and Blue Line PM
- Blue Line Crossovers and Signals
- Blue Line Station Rehab
- Orange and Blue Line Traction Power Substations
- Orange and Blue Line Communications System
- Blue Line Substation Roofs
- Orange and Blue Line Platforms
- Low Floor Trolley Vehicles
- Serrano to Miramar Phase 1
- Oceanside Station Pass-Through Track
- Carlsbad Double Track
- Poindsettia Station Improvements
- San Eljo Lagoon Double Track
- Sorrento Valley Double Track
- Tecate to Washington Crossovers
- Elvia to Morena Double Track
- COASTER Preliminary Engineering
- San Diego River Bridge
- Chesterfield Drive Crossing Improvements
- Mid-City Rapid
- Mid-Coast Trolley
- SR 905/SR 905 to SR 905/SR 94 to SR 905/SR 94/SR 94 Bus on Shoulder Demonstration Project
- I-805/SR 905/SR 94/SR 15 Transit Connection
TransNet Environmental Work

Environmental Complete, Construction Complete or Fully Funded

$291 million

Bike/Pedestrian
18 projects
$11.0 million

- Bayshore Bikeway: 68 Main Street to Palomar
- Bayshore Bikeway: Segments 4 & 5
- Bayshore Bikeway: Segments 7 & 8A
- Sweetwater Bikeway: Plaza Bonita Segment
- SR 15 Commuter Bike Facility
- Coastal Rail Trail San Diego: Rose Creek
- Coastal Rail Trail Encinitas: E Street to Chesterfield Drive
- Uptown Bikeways: Fourth and Fifth Avenue Bikeways
- Inland Rail Trail
- Coastal Rail Trail: Phase 2B - Oceanside
- Central Avenue Bikeway
- Bayshore Bikeway: Barrio Logan
- Border to Bayshore Bikeway
- Porshing Drive Bikeway
- Downtown to Imperial Avenue Bikeway
- North Park/Mid-City Bikeways: Landis Bikeway
- North Park/Mid-City Bikeways: University Bikeway
- North Park/Mid-City Bikeways: Georgia-Meade Bikeway

TransNet Environmental Work

Environmental Complete, No Construction (due to funding or decision)

$66.9 million

Highway/Managed Lanes
11 projects
$41.2 million

Transit
12 projects
$23.0 million

Bike/Pedestrian
8 projects
$2.7 million
### TransNet Environmental Work

#### Highway/Managed Lanes
- **11 projects**
- **$41.2 million**

<table>
<thead>
<tr>
<th>Environmental Complete, No Construction (due to funding or decision)</th>
</tr>
</thead>
<tbody>
<tr>
<td>$66.9 million</td>
</tr>
</tbody>
</table>

- I-5/SR 56 Interchange
- SR 56 Auxiliary Lane
- I-5 HOV Conversion to Express Lanes
- I-5/805 HOV Conversion to Express Lanes (study)
- SR 52 Extension
- SR 94/SR 125 South to East Connector
- I-805 Auxiliary Lanes
- SR 94 Express Lanes; I-805 to Downtown
- I-805 North: 2 HOV Lanes
- I-805/SR 15 Interchange
- I-805 North Auxiliary Lanes

#### Transit
- **12 projects**
- **$23.0 million**

<table>
<thead>
<tr>
<th>Environmental Complete, No Construction (due to funding or decision)</th>
</tr>
</thead>
<tbody>
<tr>
<td>$66.9 million</td>
</tr>
</tbody>
</table>

- Mira Mesa Blvd Rapid Priority Treatments
- Downtown Multiuse and Bus Stopover Facility
- Clairemont Mesa Blvd Rapid Stations
- I-15 Rapid Station Enhancements
- I-15 Transit Priority Lanes and Direct Access Ramp at Clairemont Mesa Blvd.
- I-805 Imperial Rapid Station
- Palomar Street Rail Grade Separation
- Eastbrook to Shell Double Track
- Carlsbad Village Double Track
- Sorrento to Miramar Phase 2
- San Dieguito Lagoon Double Track and Platform
- Batiquitos Lagoon Double Track
### TransNet Environmental Work

**Bike/Pedestrian**  
- 8 projects  
- $2.7 million

- North Park/Mid-City Bikeways: Robinson Bikeway  
- San Diego River Trail: Stadium Segment  
- North Park/Mid-City Bikeways: Howard Bikeway  
- Uptown Bikeways: Eastern Hillcrest Bikeways  
- Uptown Bikeways: Washington Street and Mission Valley Bikeways  
- Uptown Bikeways: Mission Hills and Old Town Bikeways  
- Uptown Bikeways: Park Boulevard Bikeway  
- North Park/Mid-City Bikeways: Orange Bikeway

**Environmental Complete, No Construction**  
(due to funding or decision)

- $66.9 million

### TransNet Environmental Work

**Highway/Managed Lanes**  
- 10 projects  
- $107.1 million

**Transit**  
- 5 projects  
- $3.4 million

**Bike/Pedestrian**  
- 2 project  
- $756,000

**Corridor Study Strategic Planning**  
- 12 projects  
- $38.4 million

Currently in Environmental Phase

- $149.5 million
## TransNet Environmental Work

### Currently in Environmental Phase

**Highway/Managed Lanes**
- 10 projects
- $107.1 million

- SR 52 Improvements/Transit Priority
- SR 67 Improvements
- SR 78 HOV/Managed Lanes
- I-15/SR 78 HOV Connectors
- SR 78/I-5 Express Lanes Connector
- SR 78 HOV Lanes: I-5 to I-15
- SR 94 Express Lanes: I-805 to Downtown
- I-805 HOV Conversion to Express Lanes
- SR 94 Transit Priority Lanes (I-805 to I-5)
- I-805 Transit Priority Lanes (SR 15 to SR 52)

**TransNet Environmental Work**

- 5 projects
- $3.4 million

- Central Mobility Station
- Carlsbad Village Double Track Trench
- COASTER Train Sets
- LOSSAN Corridor Improvements
- Downtown Multiuse and Bus Stopover Facility

**$149.5 million**
**TransNet Environmental Work**

**Bike/Pedestrian**
- 2 projects
- $756,000
  - North Park/Mid-City Bikeways: Monroe Bikeway
  - San Diego River Trail: Carlton Oaks Segment

Currently in Environmental Phase

$149.5 million

---

**Corridor Study Strategic Planning**
- 12 projects
- $38.4 million
  - Airport to Airport Connection
  - Central Mobility Connections
  - Blue Line/I-5 South
  - High Speed Transit/I-8
  - High Speed Transit/I-15
  - High Speed Transit/SR 52/SR 67
  - High Speed Transit/SR 56
  - SPRINT/Palomar Airport Road/SR 78/SR 76
  - High Speed Transit/SR 94
  - High Speed Transit/SR 125
  - Purple Line/I-805
  - Purple Line/I-805

Currently in Environmental Phase

$149.5 million