

# **Community of Ramona Economic Development Strategic Plan**

## **Submitted To:**

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## **SECTION 1: RAMONA EXECUTIVE SUMMARY**

### **1.1 BACKGROUND: THE NEED FOR A STRATEGY**

Whether a community should or should not address economic issues is a topic of discussion that permeates all levels of government and private sector activity. At the national level, the debate revolves around issues of growth—such as taxation, interest rates, regulations, expenditures, employment levels, income, distribution, education, research and development, and fairness and equity. At the county and community level, the debate includes most of these issues, but adds a number of additional questions. For example, what are the most suitable uses for particular parcels of land? What sorts of transportation and other infrastructure services are needed? How can we maintain a viable economy and still strive to improve our environment and quality of life? And, how can we maintain our sense of community and our cultural heritage?

Economic development is extremely complex and involves various levels and types of partnerships between local governments, business enterprises, local residents, not-for-profit agencies and community organizations, as the situation may require. Strategic planning is about making choices and leveraging resources to better achieve desired ends. Although an effective strategy will have broad systemic effects, it does not have to address all problems and situations simultaneously. The need is for strategic actions that will work in harmony with local management issues and will likely create the most sustaining ripple throughout the local economy, now and for the foreseeable future. Consequently, the strategic plan presented in the following sections does not seek to address every facet of private sector and government activity that has an impact, on the community of Ramona and San Diego County. This document is also not intended to serve as a basis for making local decision regarding incorporation or to dictate land use policy. Such activities, if pursued, will require focused analyses that go beyond that which was conducted as part of this economic development planning effort.

### **1.2 GUIDING PRINCIPLES AND STRATEGIC INITIATIVES**

Ramona residents feel a strong need to preserve and enhance the existing rural atmosphere and country life style of the community and they envision a community with expanded economic opportunities. The future Ramona will be a community with a unique, identifiable character, where the assets and environmental sensitivity of the land, structural designs, and landscaping are integrated into a setting where local residents, employees, and businesses can co-exist in a sustainable environment.

Ramona is a community that is undergoing significant social and economic change as new people move into the area and businesses throughout the region respond to an expanding global economy. In response to these transitional forces, economic development projects, programs, and services in Ramona should be led by a set of principles. These guiding principles are value statements derived from several sources in the community. Thus, they are fundamental to the construction of an economic development strategy. The following guiding principles are the foundation of the Community's economic development strategy:

- Leveraging through cooperative efforts of innumerable organizations, businesses, professional associations, and individuals.
- Sustainability that establishes a balance between economic growth and environmental quality, social equity, community character and public services/facilities.
- Developing a community identity that reflects the desires of current and future residents and business owners.
- Expanding the level of understanding and participation of residents and businesses in the economic development process.
- Developing local job opportunities that provide livable wages to area residents.
- Providing high quality services to local business to support sustainability.
- Implementing actions that produce measurable results and monitoring performance against established benchmarks.

### **1.3 ANALYSIS OF RAMONA**

In order to develop Ramona's economic development strategy, it is necessary to look at the factors behind the community's economy and determine its performance. The following indicators were considered.

#### **An Overview of the Local Economy**

The community's economy continues to be dominated by the retail trade and services sector. These sectors account for 32 percent of the community's sales tax income. The increasing trend has come at the expense of the manufacturing sector, which experienced a decline in jobs prior to the increase in employment in the retail and services sector. This transition has implications for wage levels since retail and services jobs traditionally pay less than jobs in the manufacturing sector.

#### **Land Needs**

The lack of local employment opportunities and physical/environmental constraints on many existing commercial/industrial parcels in Ramona, lead the study team to conduct a cursory land needs analysis for the community of Ramona. The analysis, which was not initially a part of this report, was viewed as a first step in determining how Ramona could move toward providing viable, livable wage employment for current and future residents of the community. The resulting analysis (see Appendix C) was intended to provide information to the San Diego County 2020 planning process from an economic development perspective, and to provide insights into the amount of land that would be needed if the community were to strive towards a sustainable or "smart growth" community objective. Based on this analysis, the study team determined that under the best of circumstances, the community could use an estimated 561 additional acres of commercial/industrial land to support current and future demand for employment. It is important to note that the study team was not commissioned to do this study and the information is presented as input to the much larger 2020 planning process. The assumptions and calculations reflect the opinions of the study team as derived from interviews and other information gathered from the community. The analysis was not exhaustive and should be used for its intended purpose and not as a stand-alone document.

### Competitive Advantage

The presence of a well-educated workforce is among the best advantages that Ramona possesses compared to the surrounding communities. However, a concern remains among some residents and planners about the migration of high paying jobs away from Ramona to nearby Poway. Ramona also ranks high in other business concerns, related to housing, water and sewage issues. Overall, however, Ramona is a desirable place to live and do business. With the proper policies in place, the commercial and industrial base of the community should prosper.

### Survey Analysis

To validate the findings of the different key indicators, the study team conducted a survey of residents and local business owners/managers in Ramona. The North County Small Business Development Center (SBDC) mailed a total of 3,543 postage-paid surveys to every 5<sup>th</sup> person from an alphabetical listing of registered voters living in the Ramona Community Plan Area<sup>1</sup> and to all businesses located in Ramona with available mailing information.<sup>2</sup> A breakdown of the survey responses is shown in Table 1.1.

**TABLE 1.1: SURVEY RESPONSE BREAKDOWN**

Category	Amount	Percentage
<b>Total Respondents</b>	749	100%
Total Residents including Business Owners	745	99.5%
Total Non-Resident Business Owners	4	0.5%
<b>Breakdown of Residents</b>		
Residents Only (Not Business Owners)	568	75.8%
Residents that are Business Owners	177	23.6%
<b>Business Responses</b>		
Total Business Responses	181	24.2%
Total Business Owners That Are Also Residents	177	23.6%
Total Business Owners That Are Not Residents	4	0.5%
<b>Respondents That Do Not Own a Horse</b>	624	83.4%

*Note: Percentages plus or minus one tenth due to rounding.*

During its research effort the study team found a number of references to equine related activity in the community. At the same time there appeared to be an underlying concern that those who owned horses or were involved in the equine industry would dominate the survey responses and skew the results in favor of community activities and actions that focus on equine related activities. To address this concern the study team included a question on the general survey (e.g., question #8), which asked if the respondent owned a horse. The survey results showed that 83.4% of the respondents did not own a horse. Consequently, the survey results reflect the views of the residents as well as the business owners/manager within Ramona, and do not reflect the views of any particular interest group.

<sup>1</sup> Source: County of San Diego Registrar of Voters, October 19, 2000.

<sup>2</sup> Source: Ramona Chamber of Commerce listing of Ramona Business and a walking survey conducted by Claggett Wolfe Associates in October 2000.

Key findings of the general survey of Ramona residents are highlighted below.

- Survey respondents indicated the following were the most important items in defining the character of Ramona:
  - Locally owned businesses.
  - Community recreation centers and parks, riding and hiking trails, and community events.
  - Expanses of grasslands and agricultural land uses.
  - A community with diverse character and opinions that has the capacity to work together to achieve common community goals and objectives.
- Survey respondents indicated the following actions should be undertaken to enhance the character of Ramona:
  - Foster communication and collaboration between local organizations.
  - Reduce traffic congestion on Hwy 67 and along the Main Street corridor, and enforce traffic regulations.
  - Improve the aesthetics of Ramona through code enforcement related to abandoned vehicles, trash, noise, building appearance/integrity, allowable land uses, etc.
  - Preserve grasslands and maintain agricultural land uses.
  - Develop a historic theme for the entire Main Street corridor and plant additional trees along major roadways.
- Survey respondents overwhelmingly felt that local businesses were an important part of the community, and were key supporters of community events, schools, and local clubs and service organizations.
- Survey respondents purchased a majority of their household essentials (e.g., grocery and personal items) locally. Respondents also patronized local restaurants and purchased goods from a limited number of specialty product providers (i.e., equine/livestock supplies, automotive parts/services, and hardware/lumber) in Ramona. Other specialty purchases (e.g., clothing, appliances, home furnishings and electronics/computers) were made outside of Ramona.
- Survey respondents indicated that 24-hour emergency care, expanded activities for youth and seniors and an expanded library would improve Ramona as a place to live.

Key findings of the business owners/managers survey are highlighted below. It is important to note that the survey was conducted prior to the events of September 11, 2001 and may not reflect current business conditions in Ramona.

- Survey respondents indicated their clientele is fairly evenly distributed between individuals who reside inside and outside of Ramona.
- Survey respondents indicated most of their supplies and materials are obtained from outside of Ramona.
- More than half of the survey respondents anticipate revenue growth in the next few years along with investments in facilities and equipment. Responses to questions related to commercial square footage were inconsistent and could not be properly analyzed for this plan.

- Survey respondents indicated that the following could improve the business environment in Ramona:
  - More affordable utilities.
  - Simplified County permitting process.
  - Increased high-speed communications.
  - Increased water supply.
  - Additional commercial space.
- No one group was overwhelmingly viewed as being effective in supporting the business community of Ramona. Survey respondents felt that the Chamber of Commerce and the School District were most effective in supporting businesses in the community, but only the Chamber received a response rate of over 50% in the more effective category. County government, the Community Planning Group and the Water District were considered effective by less than 30% of the respondents.
- Survey respondents indicated that finding skilled workers was the most difficult challenge in terms of hiring and retaining employees.
- Survey respondents indicated that awareness of resources available to local businesses, improved permit processing and better responsiveness to Ramona business concerns by County staff were the most important items for improving Ramona as a place to do business.
- Survey respondents indicated that Ramona should be promoted as a tourist destination with an emphasis on promoting the recreational assets of the community (e.g., hiking, equine related activities, and biking).

Looking at the indicators mentioned reveals that Ramona is undergoing phases of transition that have implications for the Community's economic development. It is with this awareness, along with the Community's guiding principles, that the study team developed the strategic action plan.

## 1.4 STRATEGIC ACTION PLAN

The realization of what is and what can lie ahead for Ramona leads to more concrete steps in formulating economic development projects. The strategic action plan was divided into nine strategic issues and twenty-six initiatives with corresponding actions (see Section 5). A summary of these issues and initiatives is presented below.

- Strategic Issue #1: Foster Community Collaboration.
  - A. Build Consensus Amongst Participating Organizations.
  - B. Develop an Organizational Framework for Implementation.
  - C. Establish a Leadership Ramona Program.
- Strategic Issue #2: Enhance Community Identity.
  - A. Maintain Rural Character through Managed Growth.
  - B. Establish Community Gateways.
  - C. Establish Nodes of Community Activity.
  - D. Establish Nodes of Economic Activity.
  - E. Community Beautification.
  - F. Expand Trail System for Equestrian, Bicycle and Pedestrian Uses.

- Strategic Issue #3: Support and Expand Community Services and Events.
  - A. Investigate Opportunity for 24-hour Emergency Medical Services in Ramona.
  - B. Expand the Ramona library.
  - C. Support and Expand Community Events.
  - D. Expand recreational and community park facilities.
- Strategic Issue #4: Support Local Business.
  - A. Provide Support to Local Businesses.
  - B. Implement a Business Retention Program.
- Strategic Issue #5: Expand and Diversify Economic Base.
  - A. Expand Inventory of Developable Industrial/ Commercial Land.
  - B. Integrate Ramona into Regional Business Attraction and Expansion Efforts.
  - C. Provide Infrastructure to Proposed Industrial/Commercial Sites.
  - D. Expand Recreational and Tourism Business Opportunities in Ramona.
- Strategic Issue #6: Transportation and Infrastructure.
  - A. Improve Automobile and Pedestrian Circulation in Ramona.
  - B. Improve High-Speed Telecommunication Services in Ramona.
  - C. Provide Infrastructure to Proposed Industrial/Commercial Sites.
- Strategic Issue #7: Government Regulations.
  - A. Simplify Permitting Process.
  - B. Update County Ordinance to Encourage and Support Home Based Businesses.
- Strategic Issue #8: Workforce Preparedness.
  - A. Prepare Ramona Residents for Current and Future Jobs.
- Strategic Issue #9: Employee Housing.
  - A. Maintain a Suitable Stock of Employee Housing.

## 1.5 ABOUT THIS DOCUMENT

This document is structured so that individual parts stand on their own as discrete aspects of the economic development strategy. Taken together, they form the framework for the living strategy as economic conditions change, new opportunities arise, and new challenges are met.

Sections 2 and 3 set the stage as to the vision and principles in developing Ramona's economic development strategy. Section 4 serves as a validating point in terms of the analysis of the of different indicators' performance. Section 5 provides the concrete actions needed to foster community collaboration and sustainable economic growth in Ramona.

## SECTION 2: FORGING AN ECONOMIC DEVELOPMENT STRATEGY

Whether a community should or should not address economic issues is a topic of discussion that permeates all levels of government and private sector activity. At the national level, the debate revolves around issues of growth—such as taxation, interest rates, regulations, expenditures, employment levels, income, distribution, education, research and development, and fairness and equity. At the county and community level, the debate includes most of these issues, but adds a number of additional questions. For example, what are the most suitable uses for particular parcels of land? What sorts of transportation and other infrastructure services are needed? What is our capacity for providing affordable housing for our workers? How can we improve the quality of our labor pool? How can we maintain a viable economy and still strive to improve our environment and quality of life? And, how can we maintain our sense of community and our cultural heritage?

Economic development is extremely complex. In part, this complexity evolves from the nature of how private-sector investment-decisions are made in a market-based economy, and from the diverse roles and responsibilities of the various participants within the public sector. Those who stress the importance of an independent private market place are quick to point out that the public sector has very little influence over which community a company will choose for a new or expanded business operation. Others counter that there are many ways the public sector influences these outcomes and decisions. The public sector's involvement in zoning and permitting, infrastructure development, education and workforce development, and maintenance of a high quality of life<sup>3</sup> are all relevant to the broad economic health of a community. Regardless of the source, nearly all agree that the process of economic development requires various levels and types of partnerships between local governments, business enterprises, local residents, not-for-profit agencies and community organizations, as the situation may require.

In the past, many communities have taken it upon themselves to manage economic development, and some have taken an isolationist view assuming that their individual efforts can preserve their way of life by restricting residential and business growth within their sphere of influence. However, this approach—though potentially effective in some areas—has proven to be ineffective in more regionally based economies. Boulder, Colorado—a city 30 miles outside of Denver—decided 40 years ago to develop a community with a balanced mix of urban and wild space only to be consumed by the uncontrolled growth of Denver and neighboring cities such as Arvada. Now the city suffers from gridlock and pollution, and the wild space they chose to preserve is no longer pristine.<sup>4</sup> A similar situation is occurring in San Diego County as the central economic core of San Diego has now pushed out to other communities such as Oceanside, Mira Mesa, Poway and El Cajon.

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<sup>3</sup> Marirose Krall, *In Search of the Good Life* (Business Facilities On Line, June 1998).

<sup>4</sup> Timothy Egan, *Drawing the Hard Line on Urban Sprawl* (The New York Time National, December 30, 1996).

Times are changing and communities such as Ramona must be integrated into a regional approach to economic development. The similarities between Boulder and Ramona are striking as the growth in Poway has brought suburban problems such as traffic congestion and housing sprawl one step closer to the once remote country lifestyle of Ramona. At the same time, this growth has provided the employment base and services that many Ramona residents rely on to sustain their rural lifestyle. A mobile and educated clientele are no longer restricted to patronizing local businesses, and local employment opportunities that pay livable wages are in short supply, with these jobs lying outside the community. Such a setting places a significant load on public services such as roads and public safety as well as the environment. The cost of providing the necessary housing, transportation, power, education, and communications infrastructure needed to attract and support today's growing businesses cannot be managed at the local level. The trend is toward regional economic development, and the time is now for San Diego County and Ramona to more aggressively embrace this trend. Cities such as Portland, Oregon have a regional plan covering 24 cities in three counties, which now serves as a national model for maintaining community identity and quality of life through managed growth.<sup>5</sup> Although this model has encountered its own challenges as growth has exceeded expectation set over 20 years ago, the approach was sound and can provide valuable lessons. Growth in a region is inevitable. However, the concept of managed growth must be recognized and incorporated into Ramona's and the County's economic plans.

To varying degrees, everything the public and private sector does has an impact on the health of the local economy—much of it positive and yet, some of it negative. Sorting out which actions and processes stimulate economic growth while maintaining the community's vision of its future, and which inhibit growth or impact the environment and sense of identity, is one of the principal reasons for forging an economic development strategy. Strategic planning is about making choices and leveraging resources to better achieve desired ends. Although an effective strategy will have broad systemic effects, it does not have to address all problems and situations simultaneously. The need is for strategic actions that will work in harmony with local management issues and will likely create the most sustaining ripple throughout the local economy, now and for the foreseeable future.

Therefore, the strategic plan that follows does not seek to address every facet of private sector and government activity that has an impact on the community of Ramona and San Diego County. Over time, as the language of the strategy permeates private companies, government operations and community deliberations, economic impact balanced with community objectives will become a more frequently used measure of community action resulting from the activities of the public, community, not-for-profit and private sectors. As that occurs, strategic planning for economic development will be able to encompass a broader range of actions and give greater scope to the economic benefits that can be leveraged from coordinated public, community and private decisions. In addition, the economic development strategy will help create new and redefined processes for implementation, and will have to be updated and expanded as necessary in the future.

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<sup>5</sup> Ibid.

## **SECTION 3: GUIDING PRINCIPLES FOR THE COMMUNITY OF RAMONA**

### **3.1 A VISION OF RAMONA'S FUTURE ECONOMY**

The economic development strategy will help guide future decisions, and ensure that the values and heritage of the past that created the community of Ramona are preserved and enhanced to create a positive economic climate for a sustainable community in which to live and work. Establishing a clear vision for the future economy of Ramona is a first step to providing an overall context for making strategic decisions about needed programs, projects and services.

### **3.2 VISION**

Ramona residents feel a strong need to preserve and enhance the existing rural atmosphere and country life style of the community, and they envision a community with expanded economic opportunities. The future Ramona will be a community with a unique, identifiable character, where the assets and environmental sensitivity of the land, structural designs, and landscaping are integrated into a setting where local residents, employees, and businesses can co-exist in a sustainable environment. Economic development is undertaken through a collaborative effort between local residents, property owners, businesses, San Diego County, and organizations such as the Ramona Chamber of Commerce, the Ramona Community Planning Group, Ramona School District, Ramona Trails Association, and Ramona Municipal Water District.

### **3.3 A SHARED ECONOMIC AGENDA: GUIDING PRINCIPLES**

Guiding principles are fundamental to the construction of an economic development strategy. The guiding principles are value statements that represent the goals and objectives of Ramona, and serve as guidelines for the development, implementation and enhancement of the economic development strategy. As a result, they should be used to assess the appropriateness of new initiatives or actions, and the effectiveness of those that already exist. Each principle should be viewed equally when making this assessment.

The guiding principles presented below were derived from the focus groups, interviews, and surveys conducted as part of the planning process. As conditions change, similar outreach efforts should be conducted to ensure that the goals and objectives of the community continue to guide the on-going enhancement and implementation of the economic development strategy.

➤ ***Promote Community Building and Build Collaborative Processes***

This principle is fundamental to the long-term survival of Ramona as a community and says that residents, organizations, educational facilities and county services should work together to create a vibrant local economy. Projects should evolve from a collaborative effort between residents and organizations.

Building collaborative processes are essential to developing a vibrant and sustainable community. The process is built on the concept of *leveraging*, which in this context is an acknowledgment that economic development, to be successful, requires the cooperative efforts of innumerable organizations, businesses, professional associations, and individuals. Given the nature of economic development, the costs of formulating and adopting policies, and the costs associated with planning and implementing programs/activities and projects, both the private and public sectors must necessarily play central roles in the process. But an important part of these roles is to nurture and collaborate with all other organizations that have specific capabilities that can more effectively provide targeted services.

Consequently, the community of Ramona should work to establish partnerships, where feasible and desirable, with government agencies, private concerns and not-for-profit organizations in order to achieve strategic economic objectives. In other circumstances, the community will look to its network of advisory bodies for guidance and assistance, and encourage publicly supported community based organizations (CBOs) to work toward the community's strategic objectives to help achieve a greater impact with scarce private and public resources. It will be essential for organizations such as the Ramona Community Planning Group, Ramona Chamber of Commerce, Ramona School District, Ramona Trails Association, Ramona Municipal Water District and San Diego County to work together to implement the strategic plan and to evolve the plan over time as economic and social conditions change in Ramona.

➤ ***Strive to Achieve Sustainable Economic Development***

The concept of sustainable economic development incorporates goals and objectives of environmental quality, social equity, community character and public services/facilities into the strategies and processes of economic development. Economic development projects should be assessed and balanced against criteria pertaining to the nature of the jobs being created such as: training requirements and opportunities, safety, openness to a diverse labor pool, and relevance to the skill base of those most in need of jobs. Similarly, economic development projects should be assessed and balanced against environmental quality criteria pertaining to, among other things: pollution and toxic waste prevention, use of renewable resources and production of environmentally sound products, and attention to mitigating additional burdens placed on local and regional transportation systems.

➤ ***Develop Community Identity***

The objective of this principle to develop a distinctive identity that will help create a quality of life attractive for future residents that will stimulate private investment, business formation, business expansion and business retention. Projects should be selected based on their ability to contribute to enhancing the community's image as visitors enter the area, preserving and restoring the community's history and diversity, protecting of the area's natural resources and establishment of a strong local sense of place.

➤ ***Expand Resident and Business Participation in Community Activities While Creating Quality of Life***

This principle simply underscores the importance of civic leaders, business and government understanding the area's economic strengths and weaknesses, and opportunities and threats. This is a fundamental tenet of strategic economic development. Economic development initiatives—programs, projects, and services—need to show how they relate to the community's core values, what sort of economic advantages are created, and on what specific opportunities they propose to capitalize.

Quality of life issues will play a major role in the long-term prosperity of the community's neighborhoods and business districts. Consequently, the strategy will focus on initiatives that encourage land uses that are favorable to the revitalization of the neighborhoods and downtown. Economic empowerment will only be achieved through expanded participation and support from the residents of area neighborhoods and business owners.

➤ ***Retain and Expand Job Opportunities for Area Residents***

Every effort will be made to pursue initiatives and programs that focus on retaining and creating primary jobs for area residents that provide livable wages. An important focus should be on jobs in those business sectors that support the community's vision and capitalize on the unique assets and heritage of the community. It should also be recognized that the community should make efforts to expand opportunities for creating suitable jobs that will provide significant economic impact to the area. The community will continue to need a substantial number of entry-level jobs that require little education and training. Retaining and attracting such jobs must still be an important focus of the economic development programs of the area.

➤ ***Provide High Value Services for Existing and New Businesses***

San Diego County and Ramona will work collaboratively to ensure that the administrative procedures, rules and regulations, and taxation policies that impact the community are fair and helpful to businesses and do not lead to unreasonably high costs of doing business. This also means that Ramona will work with the County so that the community receives value for the fees and taxes businesses pay. Ramona will also work with the County to develop and implement a consistent package of support programs and services that will include a number of diverse programs and coordinated governmental processes designed to establish, retain and expand businesses, and facilitate the ease and advantage of doing business in Ramona.

➤ ***Emphasize Implementation with Measurable Results***

The community will place the highest priority on *implementing* the various elements of the strategic plan that can actually be measured as to their effectiveness and timeliness. An emphasis will be placed on implementation and results measurement for each initiative—program, project, or service. One of the community's focuses should be to set short project timelines with achievable milestones. The long-term value of this process will be in the cumulative effect of many small but attainable tasks/projects.



## SECTION 4: ANALYSIS OF THE COMMUNITY AND ECONOMIC NEEDS OF RAMONA

### 4.1 OVERVIEW

A key part of developing a plan to manage current community efforts and shape the future of Ramona involves understanding the views and needs of Ramona's residents and business owners. The project team assessed Ramona's community and economic needs using the three-step process described below:

Step #1: One-on-One Interviews – Step #1 involved one-on-one interviews with key business and community leaders to develop a basic understanding of local issues and opportunities in the community. This step was also used to identify key organizations and individuals with the capacity to implement strategic initiatives emanating from this strategy.

Step #2: Focus Groups – Step #2 involved conducting focus group sessions with business owners and residents of Ramona. The discussion focused on identifying business and community needs, identifying community assets, highlighting barriers, and identifying actions that would support community and economic development.

Step #3: Residents and Business Owners Survey – Step #3 involved the development of the Ramona Area Survey (see Appendix A). The survey was designed to more fully refine the needs identified during interviews and focus groups with local residents and business owners. The survey was designed to collect data that is not typically collected by the U.S. Census bureau or by other data collection activities.

### 4.2 SURVEY RESPONSE RATE

The Small Business Development Center (SBDC) mailed postage-paid questionnaires to every 5<sup>th</sup> person from an alphabetical listing of registered voters living in the Ramona Community Plan Area<sup>6</sup> and to all businesses located in Ramona with available mailing information.<sup>7</sup> Participation was encouraged by newspaper coverage that included a description of the survey's purpose.

The general section, which comprised the first two pages of the survey, consisted of questions on specific items relating to quality of life, economic health, and business condition questions, where the respondents indicated the level of importance or adequacy of each issue. The general survey, which all respondents completed, included sections pertaining to the following areas:

- Defining the Character of Ramona
- Actions for Enhancing the Character of Ramona
- Business Support to Local Events and Organizations
- Retail Purchase Decisions
- Infrastructure and Public Agency Improvements
- Training

Those respondents who were either a business owner or who managed a business in Ramona were asked to complete an additional two pages of the survey. Responses to this survey were used to identify specific needs to sustain a successful business and provide employment opportunities in Ramona.

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<sup>6</sup> Source: County of San Diego Registrar of Voters, October 19, 2000.

<sup>7</sup> Source: Ramona Chamber of Commerce listing of Ramona Business and a walking survey conducted by Claggett Wolfe Associates in October 2000.

A total of 3,543 residents and business owners were sent copies of the survey with a letter describing its purpose. Of those sent, 749 (21.1%) were returned prior to the cut off date, which was approximately two weeks after the initial mailing. The number of responses resulted in a statistically valid survey with a confidence interval of 3.2 percent at the 95 percent level.<sup>8</sup> Such a high response would indicate that Ramona's residents and business owners want to be heard and be involved in determining the future of the community. Table 4.1 shows the breakdown and percent of survey responses from residents and business owners who received the survey.

**TABLE 4.1: SURVEY RESPONSE BREAKDOWN**

Category	Amount	Percentage
<b>Total Respondents</b>	749	100%
Total Residents including Business Owners	745	99.5%
Total Non Resident Business Owners	4	0.5%
<b>Breakdown of Residents</b>		
Residents Only (Not Business Owners)	568	75.8%
Residents that are Business Owners	177	23.6%
<b>Business Responses</b>		
Total Business Responses	181	24.2%
Total Business Owners That Are Also Residents	177	23.6%
Total Business Owners That Are Not Residents	4	0.5%

*Note: Percentages plus or minus one tenth due to rounding.*

As shown in the table, only four respondents were not residents, but owned or operated a business in Ramona. 568 respondents (75.8%) were residents only (not business owners), and 177 (23.6%) were business owners/managers who reside in Ramona. Further analysis indicates that 531 respondents (70.9%) have lived in the community for 6 or more years. In addition, 473 respondents (63.2%) work in Ramona although 177 (37%) of these respondents represent individuals who own or manage businesses in Ramona. Survey responses reflect the views of an equal number of workers (other than business owners/managers) that work in Ramona and those that commute to employment outside Ramona.<sup>9</sup> Based on this distribution, the survey data should be expected to reasonably reflect the desires of a broad cross section of residents who have had sufficient time to acclimated to the community and formulate an opinion on those aspects of Ramona that need improvement, preservation, or expansion.

**TABLE 4.2: YEARS OF RESIDENCY DISTRIBUTION**

Years of Residency	Number of Respondents	Percentage of Total
2 or fewer	79	10.5%
3-5	122	16.3%
6 or more	531	70.9%
No answer	17	2.3%

*Note: Percentages plus or minus one tenth due to rounding.*

<sup>8</sup> This means that if the same survey were to be conducted 100 times, 95 out of the 100 administrations would yield results within +/- 3.5 percent of the current numbers.

<sup>9</sup> The survey responses reflect the views of a total 296 residents who are not business owners/manager, but work in Ramona (e.g., 473 minus 177) and a total of 276 residents who work outside the area.

## 4.3 RESPONSES TO THE SURVEY QUESTIONS

A summary of responses to each of the major sections of the survey is presented below. A summary of all responses is presented in Appendix A. During its research effort the study team found a number of references to equine related activity in the community. At the same time there appeared to be an underlying concern that those who owned horses or were involved in the equine industry would dominate the survey responses and skew the results in favor of community activities and actions that focus on equine related activities. To address this concern the study team included a question on the general survey (e.g., question #8), which asked if the respondent owned a horse. The survey results showed that 83.4% of the respondents did not own a horse. Consequently, the survey results reflect the views of the broader community as mentioned above, and do not reflect the views of any particular interest group.

### 4.3.1 General Survey

As mentioned earlier, the first two pages of the survey asked general questions about the community and were intended to reflect the views of the residents of Ramona. The findings highlighted below are based on responses to these questions. For purposes of comparison, responses in the very important and important columns were aggregated under the heading *more important*, and responses in the somewhat and not important columns were aggregated as *less important*.

- **Defining the Character of Ramona**

The following items were viewed by survey respondents as being important in defining the character of Ramona:

- Locally owned businesses were viewed as a major component in defining community character with 85.9 percent of the responding falling in the *more important* category. This number may be somewhat skewed by the high number of business owners/manager respondents who are also resident, but high responses to other questions related to increasing local employment and the level of support provided to the community by local businesses would serve as additional indicators that local businesses are important to the residents of Ramona.
- Community recreation centers and parks, riding and hiking trails and community events were also viewed as a major part of Ramona's character. These items received the second, third and fourth highest percentage in the *more important* category with 85.4 percent, 83.2 percent and 79.7 percent respectively.
- Survey respondents viewed expanses of grassland and agricultural land as a major part of Ramona's character. The country atmosphere that these land uses support has been a recurring theme throughout this strategic planning process and previous community planning effort. Although slightly lower than community events for total score in the *more important* category, expanses of grassland and agricultural land received the second and third highest percentages under the very important column of the survey, and have aggregated percentages of 74.3 percent and 75.3 percent in the *more important* category, respectively.
- Survey respondents indicated that a community with diverse character and opinions, but with the capacity to work together to achieve common community goals and objectives would be important in defining Ramona's character. With a percentage of 82.6 percent in the *more important* category, this question had the fourth highest percentage overall in the *more important* category. Based on observations made by the study team, Ramona does have a population with diverse character and opinions. However, the study team found more divisiveness than cooperation within the community. The high percentage responses in the

*more important* category conveys that the community would like the situation to be different, and may indicate that activities in Ramona are controlled by a vocal minority that does not represent the views of the general populous.

- When asked to their top three most important items in defining the character of Ramona, survey respondents gave the highest priority to expanses of grasslands (31.9%). This was followed by tree lined highway corridors (29.8%), a vibrant and restored historic Old Town (25.3%), riding and hiking trail (24.9%), agricultural land (22.5%) and locally owned businesses (22.5%). Based on these priorities, survey respondents viewed physical characteristics as important in defining the character of Ramona including the presence of local businesses.

- **Actions to Enhance the Character of Ramona**

The following actions were viewed by survey respondents as important actions for enhancing the character of Ramona:

- The need to foster communications between local organizations to work toward common goals and objectives was viewed by survey respondents as the most important action for enhancing the character of Ramona with a percentage of 89% in the *more important* category. The responses to this question reinforce the earlier responses where a diverse, but cooperative community was important to defining the character of Ramona. The importance given to this action also signifies the community's awareness of this problem and a strong desire for change.
- Traffic related actions were the second most important areas in need of action to enhance the character of Ramona. Traffic related actions for improving Hwy 67, reducing local traffic congestion, enforcing traffic regulations and reducing commuter traffic all had percentages of 80 percent or higher in the *more important* category. Improving Hwy 67 between Ramona and Poway received the highest percentage (64.9%) in the *very important* column for all questions asked in this section of the survey.
- Survey respondents indicated that actions were needed to improve the aesthetics of Ramona through enforcing local codes and ordinances related to abandoned vehicles, trash, noise, building appearance/integrity, allowable uses of land, etc. Although communication between local organizations and traffic related actions received the highest percentages in the *more important* category, this item ranked fourth in total percentage in the *more important* category with 81.3 percent.
- Survey respondents reaffirmed the importance of open spaces in Ramona by indicating that maintaining agricultural land uses (77.0%) and preserving grasslands (76.2%) were *more important* actions that are needed to enhance the character of Ramona.
- Survey respondents also focused on other visual improvements such as developing a historic theme for the entire Main Street corridor and planting additional trees along major roadways received a high level of response in the *more important* category with 64.7 percent and 71.9%, respectively.
- When asked to their top three most important actions for enhancing the character of Ramona, survey respondents gave the highest priority to reducing traffic on Hwy 67 during peak commute times (27.2%). This was followed by preserving grasslands (26.0%), reducing traffic congestion along the Main Street corridor (25.9%), maintaining agricultural land uses (23.2%) and enforcing local codes and ordinances (22.3%).

- **Business Support to Local Events and Organizations**

Survey respondents overwhelmingly felt that local businesses were an important part of the community. Percentages in the *more important* category were 88.5 percent for supporting local community events, 84.6 percent for supporting schools, and 81.7% for supporting local clubs and service organizations. These responses would coincide with the importance that respondents earlier placed on the importance of local businesses in defining the character of Ramona.

- **Retail Purchase Decisions**

A summary of retail purchases is presented below and highlighted in Table 4.3.

- Survey respondents indicated that they made a majority of their household essentials purchases such as groceries (92.8%) and personal items (72.5%) in Ramona. In addition, respondents also made a majority of specialized purchased for equine/livestock supplies (80.6%), automotive parts/services (76.5%) and hardware/lumber (61.8%) in Ramona. Ramona has a number of establishments to provide these services, which are viewed as convenient and price competitive.
- Survey respondents indicated that they chose restaurants in Ramona (76.3%) when dining out. Respondents felt that there was an adequate selection of dining options that were reasonably priced.
- Survey respondents indicated that they make most of their specialty purchases for clothing (19.6%), appliances (29.2%), home furnishings (8.7%), and electronics/computers (10.6%) outside of Ramona. Respondents felt that the availability, and that the selection of items at reasonable prices in this category were limited.

**TABLE 4.3: MAJORITY OF PURCHASES MADE BY RAMONA RESIDENT RESPONDENTS INSIDE AND OUTSIDE OF RAMONA**

Purchase Category	Inside Ramona	Purchase Category	Outside Ramona
Groceries	92.8%	Home Furnishings	91.5%
Equine	80.6%	Electronics	88.1%
Automotive	76.5%	Clothing	81.4%
Personal Items	72.5%	Entertainment	75.8%
Restaurants	67.4%	Appliances	70.9%

*Note: Percentages plus or minus one tenth due to rounding.*

- **Infrastructure and Public Agency Improvements**

- Survey respondents indicated a need for 24-hour emergency medical care in Ramona as the most important item for improving Ramona as a place to live with 91.6% of the responses in the *more important* category.
- Survey respondents indicated a need for expanded activities and services for youth as the next most important item for improving Ramona as a place to live with 81.8 percent of the responses in the *more important* category.

- Survey respondents also indicated a need for expanded seniors activities (62.2%), an expanded library (60.6%) and increased public transportation (58.5%) as important to improving Ramona as a place to live, but these needs feel far short of the other needs identified in terms of the responses in the *more important* category.
- Survey respondents indicated that fire service (98.7%) was more than adequate in Ramona followed by local K-12 education (65.6%). Respondents were mixed on their feeling for other services as shown in Table 4.4. It should be noted that many views regarding the adequacy of public services and facilities are based on personal perception. Many residents in the community are unfamiliar with the fiscal and environmental constraints that affect such services and thus, care should be taken to properly educate the public prior to taking action on projects that require significant capital expenditures.

**TABLE 4.4: ADEQUACY OF PUBLIC SERVICES AND FACILITIES**

Item	Less than Adequate	Neutral	More than Adequate
Availability of sewer	24.7%	34.9%	40.5%
Availability of treated water	17.3%	31.8%	50.9%
Adult education classes	16.7%	47.5%	35.9%
Vocational/Technical training programs	16.5%	52.4%	31.2%
Local Library Services	13.2%	31.8%	55.1%
Local K-12 education	9.5%	25.0%	65.6%
Responsiveness of fire department	0.0%	1.3%	98.7%

*Note: Percentages plus or minus one tenth due to rounding.*

### 4.3.2 Business Owners/Manager's Survey

The second two pages of the survey were directed toward both resident and nonresident business owners/managers in the Ramona area. The questions were developed to establish an understanding of the business community in Ramona, such as their areas of operation, expectations, employee issues, community organizational issues, and the business environment. The results from this section of the survey are summarized below.

- **Description of Business Respondents in Ramona**
  - A surprising 23.3 percent of survey respondents indicated that they own or manage 2 or more businesses in Ramona. The remaining 76.7 percent only own/manage one business.
  - Responses to the survey reasonably reflect the distribution of businesses in Ramona (see Appendix B) with a high concentration of respondents in the construction (21.4%) and retail<sup>10</sup> (23.4%) sectors. A more detailed breakdown of respondents is presented in Table 4.5.

<sup>10</sup> Retail would include all respondents in the other retail, equine/livestock supplies, hardware and lumber, clothing/apparel, electronics/computers, antiques, personal items and grocery.

**TABLE 4.5: PERCENTAGE OF RESPONDENTS BY BUSINESS CATEGORY**

Industry	Percentage
Construction	21.4%
Manufacturing	15.2%
Restaurant	13.4%
Entertainment	11.6%
Real Estate	8.9%
Other Retail	6.3%
Automotive Services	4.5%
Equine/Livestock Supplies	3.6%
Hardware and Lumber	3.6%
Clothing/Apparel	2.7%
Electronics/Computers	2.7%
Agricultural/Ranch	1.8%
Antiques	1.8%
Personal Items (Cosmetics, etc.)	1.8%
Grocery	0.9%

*Note: Percentages plus or minus one tenth due to rounding.*

- A summary of survey responses showed that most respondents (60.0%) have been in operation for six or more years. A small percentage of the remaining respondents (16%) are still in the start up stage of zero to two years old. Respondent businesses ranged in age from six months to 43 years, with only 3 percent of the respondents not replying to this question.
- When asked where the business operated in terms of physical location, 45.3 percent of the respondents indicated that they operate a business in the downtown corridor of Ramona, defined as the corridor between Etcheverry Road and 2nd Street. Only 7.6 percent of the respondents indicated that they operate out of commercial space outside of the Ramona Corridor, and 5.2 percent indicated they operate on agricultural land. Surprisingly, a high percentage of business respondents (41.8%) indicated that they operate a business out of their home—36.0 percent outside of the Ramona downtown corridor and 5.8 percent inside the Ramona downtown corridor. This is a significant number and likely reflects the rural setting of the community and the independent nature of its residents.

- **Sources of Clientele**

Survey respondents indicated that their clientele are evenly dispersed from inside and outside of Ramona. Very few of the business owners'/managers' clients are referred by mail order sales (roughly 2.2%) or Internet sales (roughly 6.6%), leaving the remaining percentage of the respondents' clients to be referred via other sources of advertisement or word of mouth.

- **Source of Supplies**

Survey respondents indicated that they obtain most of the necessary supplies and materials to conduct business by means of vendors/suppliers outside of the Ramona area (roughly 62.4%).

- **Revenue and Capital Expectations**

This section of the survey reveals business owners'/managers' expectations of revenue and investment changes in the next year of operation. More than half of the business survey owners/managers that responded anticipate increases in both revenue (69.2%) and investments (51.2%), with very few owners/managers foreseeing decreases. Investments include facilities, as well as capital equipment.

- **Business Expansion and Commercial Real Estate Needs**

- Approximately 30 percent of the respondents indicated that they planned to expand their business in the next one to two years.
- Very few survey respondents are planning to move out of the Ramona area (6.0%) or discontinue operations (6.6%) in the Ramona area, suggesting that the majority of the business respondents are content with their existing locations at this time.
- Respondents who indicated that they to move or close a business was limited. Consequently, the sample size for question 13 was limited to 12 out of 177 respondents, thus making the answers to this question statistically invalid.
- The responses to questions regarding commercial/industrial square footage (i.e., questions 10 and 11b of the Business Owner's/Manager's Survey) were inconsistent and could not be adequately analyzed for use in this plan. Consequently, the responses to these questions have been excluded from this report.

- **Improving the Business Environment in Ramona**

Survey respondents responded to a number of questions to determine what could be done to improve the environment for owning/operating a business in the Ramona area. The most apparent items, such as affordability of utilities (92.2%) and a simplified County permitting process (72.5%) are of highest importance to the respondents. It is important note that San Diego County led the state in energy rate increases, it is likely that this is an important issue to all residents in the County, including Ramona residents. Other improvements worth noting (see Table 4.6) included increased levels of high-speed Internet access (49.4%), increased water supply (47.0%), and additional business space (42.6%). Although the level of importance is below 50%, the survey reflects the views of current businesses owners/managers and may not reflect the needs of the future. In particular, these items will have a significant impact on the community's ability to develop local jobs and a sustainable economic base by attracting (and retaining) new businesses to the area.

**TABLE 4.6: IMPORTANT ELEMENTS IN IMPROVING THE BUSINESS ENVIRONMENT IN RAMONA**

Improvement	More Important	Neutral	Less Important
Affordability of Utilities	92.2%	3.6%	4.2%
Simplified County permitting process	72.5%	14.6%	12.8%
Increased level of high speed Internet access	49.4%	25.3%	25.4%
Increased water supply	47.0%	29.3%	23.8%
Additional retail/commercial space	42.6%	33.3%	24.0%
Additional light industrial space	36.4%	35.8%	27.6%
Increased parking in Old Town area	35.5%	33.7%	30.7%
Increased parking in commercial areas outside the Old Town	23.8%	38.8%	37.6%

*Note: Percentages plus or minus one tenth due to rounding.*

- **Effectiveness of Organizations in Supporting the Business Community**

Survey respondents were asked for their perceptions of the effectiveness of the local organizations that have a direct effect on the future community and economic development activities in the Ramona area. Table 4.7 identifies the five main organizations in the community in order of effectiveness as described by the business survey respondents.

The Chamber of Commerce (54.0%) and School District (43.2%) received the most responses for being effective, whereas the Water District and Community Planning Group received the lowest number of responses for being effective or the highest number of *not effective* responses—42.9 percent for the Water District and 39.1 percent for the Community Planning Group. The business owner/manager respondents also identified the Community Planning Group to be *somewhat effective* (36.5%), but more found it to be *not effective* (39.1%). The County Government received the most responses for being only *somewhat effective* (45.2%), with a diverse response range of effectiveness.

**TABLE 4.7: EFFECTIVENESS OF ORGANIZATIONS IN SUPPORTING THE BUSINESS COMMUNITY**

Organization	More Effective	Less Effective	Not Effective
Chamber of Commerce	54.0%	30.4%	15.5%
School District	43.2	34.8	21.9
County Government	26.7	45.2	28.0
Community Planning Group	24.4	36.5	39.1
Water District	24.4	32.7	42.9

*Note: Percentages plus or minus one tenth due to rounding.*

- **Employee Issues**

Survey respondents identified finding skilled workers (78.7%) to be the most difficult challenge in terms of hiring and retaining employees, with semi-skilled workers trailing significantly behind (37.7%). Survey respondents indicated that unskilled *part-time* and *full-time* employees are not a challenge to hire and retain. The responses to questions related to employment numbers were not consistent, and thus, were not included in this analysis.

- **Important Elements in Conducting Business in Ramona**

Various items were listed in the survey to assist the study team in identifying additional resources or actions that could improve Ramona as a place to do business. Table 4.8 shows the top five aggregated responses of the survey respondents in terms of percentages. The table clearly illustrates that improved awareness of resources available to Ramona businesses (77.8%), improved process and approval of County permits (71.6%), and better responsiveness to Ramona business concerns by County staff (70.2%) are of most importance to the business survey respondents in Ramona.

As illustrated in Table 4.8, another important item to survey respondents is the promotion of the Ramona as a tourist destination (66.2%). Specifically, respondents indicated that hiking (56.1%), equine related activities (52.6%), and biking (50.7%) are among the most important items that should be promoted.

Interestingly, community supported vocational programs (39.9%), employer workshops (31.6%), and workshops on business topics (32.5%) are among the least important items to the business survey respondents. This is contradictory to the interpretation of the business survey respondents suggesting that it is a challenge to hire and retain skilled employees, as discussed in the previous section. Clearly, it appears that although the business survey respondents seek to hire skilled employees, they resist the effort to train them through employer workshops and community supported vocational programs—as these items were deemed less important.

**TABLE 4.8: IMPORTANT ITEMS IN DOING BUSINESS IN RAMONA**

Item	More Important	Neutral	Less Important
<b><i>Core Business</i></b>			
Improved awareness of resources available to Ramona businesses	77.8%	13.9%	8.2%
Improved processing and approval of County permits	71.6%	19.1%	9.3%
Better responsiveness to Ramona business concerns by County staff	70.2%	20.7%	9.2%
Increased collaboration between Ramona business owners	63.5%	23.1%	13.4%
<b><i>Tourism</i></b>			
Promote Ramona as a destination location	63.2%	23.8%	13.1%
Promote the Ramona area for its natural resources and recreational activities	66.2%	16.2%	17.5%
Hiking	56.1%	20.0%	23.8%
Equine related	52.6%	21.8%	25.6%
Biking	50.7%	26.3%	23.0%
Bird watching	47.4%	26.0%	26.6%
Boating and fishing	43.3%	29.3%	27.3%
Off-road vehicle	27.4%	23.3%	49.3%

*Note: Percentages plus or minus one tenth due to rounding.*

## SECTION 5: STRATEGIC ACTION PLAN

The strategic economic development action plan reflects the guiding principles that will form the framework for developing, implementing and measuring future economic development within Ramona. The action plan focuses on managed growth and captures economic benefits that can be derived from the area's unique characteristics.

### 5.1 OVERVIEW OF STRATEGIC INITIATIVES

Once the guiding principles are established, the next step is to build strategic initiatives that address community needs. After the initiatives are in place, a measurable action plan is developed to achieve the initiatives.

The initiatives were derived from information obtained during the community outreach process (focus groups, survey responses and interviews). The following pages will give an expanded description of implementation methods for the plan's proposed initiatives in terms of steps, processes and activities that should be launched now and in the future. Table 5.1 present an overview of Ramona's initiatives and action plans and presents the names of various organizations and agencies that should be involved with their implementation.

The strategic initiatives are listed below:

#### 5.1.1 Strategic Issue #1: Foster Community Collaboration

Building collaborative processes are essential to developing a vibrant and sustainable community. The concept of *leveraging*, in this context, is an acknowledgment that economic development, to be successful, requires the cooperative efforts of innumerable organizations, businesses, professional associations, and individuals. Given the nature of economic development, the costs of formulating and adopting policies, and the costs associated with planning and implementing programs/activities and projects, both the private and public sectors must play central roles in the process. An important part of these roles is to nurture and collaborate with all other organizations that have specific capabilities that can more effectively provide targeted services.

**Summary of Relevant Survey Responses:** Survey participants were asked how important "a community of individuals with diverse character and opinions that work together to achieve a common objective or vision that reflects the interest of a majority of the residents in Ramona" is to defining the character of the community. A combined total of 82.6% of the respondents said this type of collaboration was very important and important. When asked the importance of "fostering communication between various groups in Ramona to work toward common goals and objectives," 89% of survey respondents said it was very important and important.

Although some steps have been taken to increase the level of collaboration amongst the various groups within Ramona, the community has a history of divisiveness that threatens the very lifestyle that both residents and business owners have indicated they want to maintain. The study team found from its interviews and survey that most groups in Ramona have a common vision and objectives for the community. However, the community is incapacitated by poor communication that seems to be exacerbated by a vocal minority on both sides of the issues.

### **The Trouble With Words**

During its interview process the study team uncovered an interesting finding that exemplifies the challenges faced in Ramona. When discussing the contentious issue of what acceptable minimum residential lot sizes would sustain a rural community character, two different answers were typically provided:

- Residential lot sizes of 1 acre or more
- Residential lot sizes of 4 acres or more

Such responses might be expected, but the sources of these responses are what surprised the study team. The first response of 1 acre or more was provided by an individual who was characterized by the community as being on the *no-growth* side of the fence, whereas the second response was provided by an individual who was characterized by the community as being on the *go-go-growth* side of the fence. What these statements did uncover is that people in Ramona share a common goal, but they have different perspectives. Some come from urban settings where 1 acre is a large lot, whereas some come from rural settings where 100+ acre farms and open spaces are the norm. “Who is right?” is a good question. However, in the current environment the groups cannot seem to come to the table to even be able to understand the difference, let alone to resolve an issue.

The initiatives that follow are intended to overcome local challenges and foster community collaboration. However, if these or other efforts are unsuccessful in bringing the various groups in the community closer together, the remainder of the initiatives and actions included in this plan are in jeopardy and the community should seriously consider whether the investment in further community and economic development is worthwhile when the outcomes of these efforts may be limited.

#### Initiatives and Objectives

- A. Build Consensus Amongst Participating Organizations – Residents, organizations, educational facilities and county services should work together to create a vibrant local economy. Projects should focus on collaborative work between residents and organizations, communication, and promoting local entrepreneurship.

##### *Actions*

- Engage a professional mediator to resolve issues and conflicts. The study team does not feel that the community currently has the capacity to resolve local issues and thus recommends that an outside, independent mediator be used to bring together the various groups in Ramona around the adoption and implementation of the strategic plan.
- Conduct team-building exercises involving all participants that will be involved in the implementation of the strategic plan. These exercises can be used to jump start the broader leadership program outlined in Item D. below.
- Obtain commitments and support to implement the strategic plan.

##### *Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- San Diego County 2020 Planning Process

- B. Develop an Organizational Framework for Implementation – This initiative is intended to develop a formal or informal organizational structure to coordinate many of the initiatives and actions outlined in this strategy. Although past efforts were not successful, a formal structure such as a Business Improvement District (BID) or Main Street Program<sup>11</sup> may be worth revisiting due to ability of these programs to secure some of the funding that will be needed to implement a number of the recommended actions in the strategic plan.

*Actions*

- Establish an implementation task force comprised of representatives from key local organizations to revisit the concept of a formal organizational structure such as a BID or to formulate an informal organization structure such as a Task Force.
- Select a lead organization or body to coordinate implementation of the strategic plan.
- Define roles and responsibilities of all participants involved in the implementation of the strategic plan.
- Investigate alternative legal entities for securing funding.

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- Individuals and organizations involved in previous efforts to form a BID or develop a Main Street program.
- California Main Street Program.

- C. Establish a Leadership Ramona Program – This program would be designed to build a team of local community leaders through a program in which participants meet local businesses, community organizations and county officials with responsibility for the community of Ramona. Participants learn about the many different aspects of a sustainable community. Activities may include meeting with government officials and business leaders to learn more about budgeting and strategic planning, presentations from regional professionals to understand the various aspects of economic and business development, touring the police and fire departments, training facilities to get a better understanding of public safety, touring water and wastewater treatment facilities and meeting with public works staff to understand infrastructure issues, and much more. Each week a different topic would be featured.

*Actions*

- Establish a Leadership Ramona Program that utilizes the Cal State San Marcos leadership training program. A group of individuals should be sent through the program annually with alumni networking on a semi-annual or annual basis in Ramona to share experiences and recruit future participants.

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- Cal State San Marcos leadership training program.

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<sup>11</sup> Contact Barbara Mason, Manager, California Main Street Program, 801 K Street, 16th floor Sacramento, CA , 95814  
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### 5.1.2 Strategic Issue #2: Enhance Community Identity

Image and identity both play a role in establishing a sense of community for area residents, and in making a positive or negative impression on visitors to the community. Enhancing the visual image and identity of the commercial areas of Ramona will distinguish the community from the surrounding area, making it clear to visitors and residents that they have arrived at a destination. Such an impression encourages people to stop, which can improve the level of visitation and patronage to area businesses. To this end, the initiatives that follow are intended to enhance the image and identity of the commercial core of Ramona.

**Summary of Relevant Survey Responses:** Of the survey questions that ask about maintaining rural character in Ramona, all of the question totals are greater than 65% (Riding and hiking trails received 83.2%, agricultural land 75.3%, expanses of grassland 74.3% and tree lined corridors 69.2%). Expansion of grasslands was the greatest response (31.9%) for the most important item in defining the character of Ramona, followed by tree lined corridors (29.8%). 66.2% of respondents said it is important to “promote the Ramona area for its natural resources and recreational activities.”

A combined total of 50.6% of respondents indicated that “improved signage notifying visitors that they have arrived in Ramona” was important or very important in terms of doing business in Ramona.

Survey respondents (81.3%) indicated that “enforcing local codes and ordinances related to abandoned vehicles, trash, noise, building appearance/integrity, allowable uses of land, etc.” are actions needed to enhance the character of Ramona. Another 66.8% indicated that “establishing Old Town Ramona as a focal point for community activities, entertainment and business” was important or very important.

The third highest survey response rating the importance of items in defining Ramona’s character was “riding and hiking trails” (83.2%). When asked about the importance of action for “expanding the network of riding, biking and hiking trails in and around Ramona,” 65.3% said it was important or very important.

#### Initiatives and Objectives

- A. Maintain Rural Character through Managed Growth – The desire to maintain the rural character of Ramona permeated all interview, focus group and survey activities of this project and supports previous objectives of local residents as outlined in the Ramona Community Plan. Consequently, the actions outlined below are designed to support this outcome while managing the types of growth that will typically occur within a community such as Ramona.<sup>12</sup>

##### *Actions*

- Conduct community workshops on the various concepts of managed-growth and no-growth to educate local residents, community groups and business owners on the subject. The objective of this action is to establish a common base of knowledge to assist the community in making informed decisions during current and future planning efforts involved with the community and the economic development strategy.

<sup>12</sup> The term growth is not exclusively limited to population, which is a sensitive issue in Ramona. Growth also includes additional jobs for existing residents, revitalization of deteriorated buildings, expanded wealth generation of local businesses as a result of improved business practices or expanded markets, and transformation of the community’s demographics as the make-up of the local population changes over time. It is important to understand that change must occur to sustain a vibrant and sustainable community. If all activities to improve Ramona as a place to live and work were to stop today, the community would deteriorate. The cost to support housing (e.g., roads, fire, police, etc.) exceed the revenues generated from property taxes, and local retail business would continue to struggle and likely fail as more and more residents do their shopping closer to where they work.

- Support initiatives to preserve grasslands and agricultural uses surrounding the core commercial and residential areas of Ramona, taking into consideration the commercial/industrial land that will be needed to provide local, livable-wage jobs desired by the community.<sup>13</sup> Preservation efforts should strive for a balance that meets both objectives while moving Ramona toward a more sustainable community. As with many initiatives in Ramona, grassland preservation is a very contentious issue and will require all parties to come to a middle ground in order to address the broader needs of the community.

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- San Diego County General Plan 2020
- Grasslands preservation efforts.

- B. Establish Community Gateways – Attractive commercial gateways, integrated with the community image and theme, could welcome visitors and residents to Ramona, and encourage pedestrian related activities (e.g., shopping, entertainment, community events, etc.). These physical points of entry will convey to residents and visitors from outside the area that they are at their destination.

*Actions*

- Develop identity and signage at gateways into Ramona; building on the “Valley of the Sun” moniker that is currently used to describe the area. The gateways should focus on points of entry for those coming into Ramona on Highway 67 and 78 as well as along the main corridors leading into town used by visitors returning from Barona. These should be differentiated from the points at which visitors enter the outlying residential areas of the community.
- Build on existing tree-lined corridors leading into and through Ramona as an additional component in supporting the gateway concept.<sup>14</sup>

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- None.

- C. Establish Nodes of Community Activity – As described in the previous sections, nodes are centers of activity that serve as focal points for initiating and expanding activities and investments within a community. At this time, the nodes of community activity in Ramona are divided between areas such as Old Town, Collier Park, the community center, the post office, the library, etc., places where residents come together. There is no central point within Ramona that serves as the center of the community.<sup>15</sup> Consequently, the study team recommends the following actions to establish a focal point for community activity:

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<sup>13</sup> A combined total of 68.9% of the survey respondents indicated that “a community where local residents can find suitable employment to match their skills” was very important or important in defining the character of the community of Ramona. A combined total of 85.9% of the survey respondents indicated that “locally owned businesses” were very important or important in defining the character of the community of Ramona.

<sup>14</sup> A combined total of 69.2% of the survey respondents indicated that “tree lined highway corridors” were very important or important in defining the character of the community of Ramona.

<sup>15</sup> Local residents may view old Town and the community center as focal points for the community. However, the Old Town lacks the concentration of community services (e.g., library, post office, etc.) and physical layout (e.g., the building fronts

*Actions*

- Continue to support the revitalization of Old Town Ramona and expand these efforts to link Old Town to the proposed Intergenerational Community Campus.
- Support Ramona Intergenerational Community Campus (RICC) as a focal point of community activity. Design efforts should continue to consider the potential for the RICC to serve as Ramona's town square. In addition, design efforts should consider choosing a theme that will convey the historic character and country lifestyle of Ramona.
- Relocate and expand library facilities to the proposed RICC.
- Link riding, bicycling and hiking trails to the RICC site.
- Provide appropriate facilities at the RICC to accommodate riders, cyclists, hikers, etc.
- Link the RICC via trails, sidewalks, etc. to other centers of community activity.

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- Ramona Community Plan
- Ramona Intergenerational Community Campus planning efforts.

- D. Establish Nodes of Economic Activity – In addition to establishing nodes of community activity, Ramona must also establish nodes of economic activity. The most visible economic nodes to residents and visitors are retail centers. However, other than the Ramona Old Town district, the remainder of Ramona has evolved into one long strip retail/commercial corridor with little distinct identity or clustering of businesses to encourage people to stop or walk between businesses instead of getting back in their car. Consequently, the proposed actions are intended to highlight existing or potential efforts that can establish these nodes of retail activity.

Less visible, but necessary nodes of economic activity are the commercial and industrial areas that house the businesses that can provide livable wage jobs to community residents. In Ramona, much of this activity is dispersed throughout the community providing little opportunity for clustering of compatible businesses or for making infrastructure investments (e.g., water, sewer, power, telecommunication, roads, etc.). Consequently, an action to address this is noted under this heading because it is a part of a community's identity. However, an expanded discussion of this topic is included in Strategic Issue #5.

*Actions*

- Continue restoration and beautification of Old Town Ramona following the historic theme established for the corridor.
- Establish an additional node of retail/commercial economic activity around the proposed RICC with a distinct theme that characterizes the historic and rural character of Ramona.
- Enhance and expand commercial/industrial nodes as outlined in Strategic Issue # 5.

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- San Diego County 2020 planning process
- RICC development efforts
- Old Town revitalization efforts
- Old Town Streetscape Project
- Town Hall Restoration Project.

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the state highway and there is little room for gathering, such as might be found in a town square) to serve this function, and the community center is isolated on the outskirts of the community.

- E. Community Beautification – A community devoid of trash, abandoned vehicles and run down buildings projects a positive image to visitors and gives local residents a sense of pride. The actions outlined below are designed to attain this objective.

*Actions*

- Expand county code enforcement activities within Ramona.
- Work with San Diego County to establish a façade improvement program for commercial and retail properties that would encompass Ramona.
- Develop a community clean-up program along trail system utilizing community volunteers.

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- San Diego County General Plan 2020
- Ramona Community Plan.

- F. Expand Trail System for Equestrian, Bicycle and Pedestrian Uses – Riding, bicycling, walking and hiking trails can provide an alternative method for bringing visitors, residents and employees into Ramona’s various retail and commercial areas and should contribute to a system of fully connected and interesting routes to all destinations. While also decreasing traffic congestion, Ramona can develop itself as a destination for horse enthusiasts, cyclists, pedestrians and hikers to take advantage of the scenic trails and experience the local environment.

*Actions*

- Investigate opportunities to establish a creek-side trail system linked to the proposed RICC and the community center.
- Support the Ramona Trails Association (RTA) and other efforts to expand trail system in and around Ramona.
- Support other regional, recreational and park activities to expand and maintain local riding, cycling and hiking trails.

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- Ramona Community Plan
- Ramona Trail Guide
- Ramona Trails Association (RTA) trail expansion efforts.

### **5.1.3 Strategic Issue #3: Support and Expand Community Services and Events**

Community services and events are essential to providing a suitable place to live and maintaining a sense of community. The initiatives and the respective action to achieve this objective are highlighted below.

**Summary of Relevant Survey Responses:** In order to improve Ramona as a place to live, 91.6% of the survey respondents indicated that 24-hour emergency medical care was very important or important.

A combined total of 60.6% of survey respondents said it was very important or important to expand the library.

A combined total of 79.7% of the survey respondents said that “community events (e.g., Rodeo Fair, 4-H, Fireworks, Air Fare) are important to defining the character of Ramona.

To enhance the character of Ramona, a combined total of 53.4% of respondents indicated that “increasing the number of events and activities that bring Ramona residents together as a community” was either important or very important. Another 31.5% of the respondents were neutral on the subject, for a total of 85.8%.

A combined total of 62.2% and 81.1% of respondents indicated that expanded activities would improve Ramona as a place to live for seniors and youth, respectively.

The second highest survey response rating the importance of items in defining Ramona’s character was “community recreation centers and parks” (85.4%). When asked about the importance of action for “expanding the network of riding, biking and hiking trails in and around Ramona,” 65.3 % said it was important or very important.

### Initiatives and Objectives

- A. Investigate Opportunity for 24-hour Emergency Medical Services in Ramona—Local emergency medical services can improve the quality of life and sense of security of local residents. Such services will increase in importance as Ramona continues to attract retirees and as the local population ages.

#### *Actions*

- Develop a feasibility study and a subsequent plan for providing 24-hour emergency medical services in Ramona. The focus of the study should be to determine local demand, alternative approaches for delivery, and the relative financial feasibility of an effort to provide these services.

#### *Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- None.

- B. Expand the Ramona library – The interview, focus group and survey participants indicated that the current library facility did not serve the needs of the community. Consequently, an action to expand the library and incorporate an expanded facility into the proposed RICC is provided as a recommended action under this heading as well as above.

#### *Actions*

- See Strategic Issue #1: Initiative C.

#### *Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- None.

- C. Support and Expand Community Events - Ramona has unique weather and assets that are attractive to both residents and potential visitors from the San Diego region and elsewhere. Currently the community has a series of events (e.g., Fourth of July Fireworks, quilt show, Ramona Rodeo, Ramona Air Fair, etc.) that occur from May through December. Increasing the number of events during this period and adding (weather appropriate) events during the months of January through April can both improve the sense of community and attract more tourist dollars to the area. In addition, events developed around the equine industry could expand visitor attraction to Ramona that would provide additional economic and recreational benefits to the community.

*Actions*

- Continue to support and promote events (e.g., fireworks, rodeo, air show, etc.) locally and regionally. Linkages should be made with the North County Convention & Visitors Bureau as well as the San Diego Convention & Visitors Bureau through promotion activities such as the Ramona Mall web site and other media.
- Investigate an expanded venue of events/activities to be held throughout the year that build on the unique character of Ramona.

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- Ramona Chamber of Commerce and other community supported events.

- D. Expand recreational and community park facilities – Recreational activities are a vital part of the community and have been a mainstay in Ramona. Expanding recreational activities that foster family and community interaction, broadening the network of park facilities linked by an expanded trail system would build on the small town character of Ramona and provide a enjoyable experiences for both residents and visitors.

*Actions*

- Work with the Ramona Municipal Water District to develop a plan to expand existing park and establish new parks.
- Investigate additional recreational activities for area seniors and youth.
- Support and expand trail systems that links parks, recreational and community facilities. (see Strategic Issue #1: Initiative F)

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- Existing trail expansion efforts by RTA and others
- Ramona Municipal Water District
- Ramona Chamber of Commerce
- Ramona Boy's and Girl's Club.

#### **5.1.4 Strategic Issue #4: Support Local Business**

Cooperative efforts of innumerable organizations, businesses, and individuals are key to ensuring that economic development efforts are successful in Ramona. An established legal entity charged with coordinating the strategy should establish partnerships with businesses and organizations where feasible and desirable, in order to achieve strategic outcome objectives.

**Summary of Relevant Survey Responses:** A combined total of 77.8% of survey respondents indicated that “improved awareness of resources available to Ramona businesses” is important or very important.

A combined 85.9% of survey respondents indicated that “locally owned businesses” are important to defining the character of Ramona.

Survey respondents indicated that local businesses were very important or important in supporting local schools (84.6%), local community events (88.5%), and local clubs and service organizations (81.7%).

A total of 41.8% of the respondents to the business portion of the survey operated businesses from their homes. 36.8 % of these businesses were operating outside the downtown corridor of Ramona.

### Initiatives and Objectives

A. Provide Support to Local Businesses – Local businesses provide both services and jobs for area residents. In addition, local businesses are major supporters of community programs such as the Boy’s and Girl’s Club and events such as the Rodeo. Consequently, supporting local businesses is an essential activity to promote a sustainable community now and in the future.

#### *Actions*

- Increase awareness of existing programs and services available to local businesses such as:
  - Small Business Development Center, North San Diego County at Mira Mesa College (<http://www.sandiegosmallbiz.com/>) a full service center for small business assistance
  - The Connector (<http://www.connector.com>) a regional buyer supplier network
  - San Diego World Trade Center (<http://www.sdwtc.org>)
  - CalWorks for workforce development
  - San Diego County, Office of Trade and Business Development ombudsman and permitting assistance programs
  - CDC Small Business Finance and California Southern Small Business Financial Development Corporation for small business financing
  - Others.
- Work with local telecommunications, cable or satellite service providers (e.g., DirectTV, etc.) to increase the bandwidth of telecommunication services in Ramona with an emphasis on expanding services to support home-based businesses.
- Conduct annual survey of business owners to identify service gaps and develop supplemental services as needed.

#### *Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- See listing above
- Ramona Chamber of Commerce business services.

B. Implement a Business Retention Program – Communities have found that existing businesses are valuable assets that may be lost if conditions are not favorable for their operation. Some may feel that a business will stay just because its owner lives in the community. However, the study team has found the many businesses that are good community citizens are forced to move their business because the cost of doing business or local attitudes makes it difficult for them to sustain operations in a continually more competitive marketplace. Consequently, the following actions are highlighted to support the retention of businesses in Ramona.<sup>16</sup>

<sup>16</sup> The City of Bakersfield has developed an effective, low-cost business retention program that can be viewed on their web-site at ([www.ci.bakersfield.ca.us/edcd/econdev/report.pdf](http://www.ci.bakersfield.ca.us/edcd/econdev/report.pdf))

*Actions*

- Support San Diego County, Office of Trade and Business Development business retention efforts in Ramona.
- Hold annual business appreciation week with a business of the year award.
- Establish and maintain a directory of Ramona businesses building on existing directories maintained by the Ramona Chamber of Commerce and the Orange Book Directory.
- Conduct annual business satisfaction survey.

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- San Diego County, Office of Trade and Business Development
- Orange Book Directory
- Ramona Chamber Directory.

### **5.1.5 Strategic Issue #5: Expand and Diversify Economic Base**

As outlined in the economic baseline analysis, Ramona’s economy is currently dominated by retail and service establishments that predominantly provide jobs with wages that will not allow workers to live in Ramona. In order to develop a sustainable community, Ramona will need to expand and diversify its economic base.

**Summary of Relevant Survey Responses:** A combined 68.9% of survey respondents indicated that “a community where local residents can find suitable employment to match their skills” was very important or important.

A combined 80.3% of survey respondents indicated that “reducing the amount of traffic on Hwy 67 between Ramona and Poway during peak commute times” would be very important or important to enhancing the character of Ramona. Such an outcome could be achieved by creating more local jobs.

A combined 85.9% of survey respondents indicated that “locally owned businesses” are very important or important to defining the character of Ramona.

A combined total of 92.2% of the survey respondents said it was important or very important to have “affordable utilities (e.g., power, water, sewer, etc.)” to improve the environment for doing business in Ramona.

A total of 61.7% of survey respondents said “improved access to tourist attractions and information once visitors arrive in Ramona” is important and very important in terms of doing business in Ramona.

#### Initiatives and Objectives

- A. Expand Inventory of Developable Industrial/Commercial Land – Ramona, like much of San Diego County has insufficient industrial/commercial land available to provide jobs for local residents. Much of the industrial/commercial land currently zoned for development in Ramona is in environmentally sensitive areas or in a flood plain. Consequently, the following actions are presented to expand the inventory of developable industrial/commercial land in Ramona.

*Actions*

- Provide input into the 2020 planning process to designate additional land for industrial/commercial development utilizing the information present in the land analysis presented in Appendix C of this strategic plan.
- Investigate opportunities for environmental mitigation of currently zoned commercial/industrial land in Ramona.
- Work with San Diego County Department of Planning and Land Use to develop overlays or other controls for existing and newly zoned industrial/commercial land to restrict heavy industrial uses that are currently allowed under the M-54 designation, but are unacceptable to the broader community of Ramona.<sup>17</sup>

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- San Diego County 2020 planning process
  - Regional Technology Park: Feasibility Study
  - Industrial Market Analysis: Ramona Airport Master Plan
  - Ramona Community Plan.
- B. Integrate Ramona into Regional Business Attraction and Expansion Efforts – Ramona is too small a community to actively recruit businesses to the area. Consequently, efforts should be undertaken to insure that Ramona is include in broader county and regional business attraction efforts. The community should focus on industries that are compatible with the type of community desired by local residents. These may include, but are not limited to, light manufacturing and assembly, service and office type businesses, equine and agriculturally related businesses, etc. that may support larger business operations in Poway or other regional, national and global markets. The actions highlighted below will support this effort:

*Actions*

- Develop an inventory of commercial/industrial properties include size, age of construction, type of construction, special features, etc.
- Develop an inventory of commercial/industrial land including size, zoning, proximity to or availability of amenities (e.g., power, water, sewer, telecommunications, roads, etc.), environmental/flood zone constraints, etc.
- Prepare a map of commercial/industrial properties with infrastructure overlays.
- Prepare information package highlighting Ramona as a place to do business including available local, county, state and federal support programs.
- Participate in regional business attraction efforts with San Diego County and the San Diego Regional Economic Development Corporation.

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- San Diego County, Office of Trade and Business Development
- San Diego Regional Economic Development Corporation
- Local realtors and property owners.

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<sup>17</sup> This effort should include consensus building amongst the broader community of Ramona.

- C. Provide Infrastructure to Proposed Industrial/Commercial Sites – Many businesses make locational decisions based on the time it will take to occupy a new facility. Land may be zoned for commercial/industrial use, but if it lacks basic infrastructure improvements (water, sewer, power, roads, etc.) it can extend the development time for a new facility and place a community at a disadvantage when competing against other potential sites. The study team understands some of the restrictions faced by Ramona in terms of water, sewer and other infrastructure. However, a plan must be developed to outline all of the options for providing these services to current and future commercial/industrial sites in the community. Consequently, the need for action is highlighted in this section with additional recommendations being presented below under Strategic Issue #6.

*Actions*

- See Strategic Issue #6: Initiative C. below.

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- Ramona Water District
- San Diego County Department of Public Works
- CalTrans
- Utility companies.

- D. Expand Recreational and Tourism Business Opportunities in Ramona – Ramona’s natural assets and historic character provide a unique opportunity for capturing additional economic opportunities for the community that can be part of a broader mix of business. With the events of September 11, 2001, such an opportunity may be increased as people in the San Diego region limit their travel to local areas. Expanded opportunities should be considered around the equine industry, where horse-related expenditures by both residents and visitors support local equine-related businesses in Ramona (Source: REIN Equine Survey 2000). Other opportunities may exist with local aquatic and nature-related recreational activities, antiques, and travelers passing through Ramona on their way to Julian, Barona and other destinations.

*Actions*

- Continue to promote recreational assets and community events through the North County Convention & Visitors Bureau and the San Diego Convention & Visitors Bureau to reach a broader audience.
- Expand the riding, cycling and trail systems in and around Ramona as discussed above.
- Build on the area’s suitability for equine related events and activities by promoting the area through travel services that promote horse-related vacation packages.
- Evaluate the feasibility of increasing the number of hotel/motel rooms to encourage overnight stays in Ramona.
- Investigate opportunities to develop a joint Tourism Development and Marketing Plan for Ramona, Julian and Barona; similar to that developed for Borrego Springs, California.
- Work with CalTrans and San Diego County Department of Public Works to improve signage directing visitors to recreational, historic and tourist-related points of interest in and around Ramona.

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- North County Convention & Visitors Bureau services and web site
- San Diego Convention & Visitors Bureau services and web site
- Ramona Chamber of Commerce information area and services
- Ramona Mall web site
- RTA and REIN activities, Ramona Trails Guide, and Equine Survey and Report, August 2000
- Tourism Development and Marketing Plan, Borrego Springs, California prepared by Chandler, Brooks & Donahoe, Inc., October 18, 2001.

### 5.1.6 Strategic Issue #6: Transportation and Infrastructure

The transportation systems in Ramona are already stressed due to the large number of residents that commute out of the area for jobs or other services. Other services such as water, sewer and power are available, but at costs many in the community feel are prohibitive to sustain and expand business activity in the area. At the same time, high-speed communications services are limited. To improve current conditions in Ramona and set the stage for managing future economic growth, steps must be taken to address transportation and infrastructure concerns within the community. The following initiatives and actions focus on addressing these issues:

**Summary of Relevant Survey Responses:** A combined 85.5% of survey respondents indicated that “improving Highway 67 between Ramona and Poway to handle current and future levels of traffic” was very important or important.

A combined 82.7% of survey respondents indicated that “reducing traffic congestion along the Main St. corridor” would be very important or important to enhancing the character of Ramona.

A combined 67% of survey respondents indicated that “reducing traffic speeds and noise through Old Town Ramona” are very important or important to enhancing the character of Ramona.

A combined total of 49.4% of survey respondents indicated that “increased level of high-speed Internet access” was either important or very important to improve the environment for operating/owning a business in Ramona. This figure is likely to increase as business practices evolve to use more telecommunications infrastructure and new businesses move into the area.

Only 40.5% of survey respondents felt the availability of sewer service was very adequate or adequate.

#### Initiatives and Objectives

- A. Improve Automobile and Pedestrian Circulation in Ramona – Congestion in Ramona was identified as a negative influence on the visitor’s experience in the region and as a major deterrent to business retention, expansion and attraction. This initiative is intended to take steps to resolve this issue with the objective of addressing traffic management relative to economic development objectives. Of the survey questions that ask about traffic and traffic circulation in Ramona, neither of their totals are less than 80% (“Improving Hwy 67 between Ramona and Poway to handle current and future levels of traffic,” 85.6%, and “Reducing the amount of traffic on Hwy 67 between Ramona and Poway during peak commute times,” 80.3%). Improving Hwy 67 between Ramona and Poway to handle current and future levels of traffic was the greatest response (41.5%) for the most important item in enhancing the character of Ramona, followed by reducing the amount of traffic on Hwy 67 between Ramona and Poway during peak commute times (27.2%).

*Actions*

- Prepare a traffic and pedestrian circulation plan with consideration of economic impacts on the community. The study should also focus on steps that can be taken to slow traffic through Old Town Ramona.
- Support the proposed Highway 67 expansion.

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- San Diego County General Plan Update 2020
- Ramona Community Plan
- Proposed Highway 67 expansion plan.

- B. Improve High-Speed Telecommunication Services in Ramona - Ramona should take steps to increase the use and investment in technology that will ultimately improve civic life, provide open access to information and resources, and support the ability of local businesses to compete in a global economy. Although the community wishes to maintain its rural country character, it can do so and still participate in the broader global economy. Educational advancement, home based businesses, telecommuting and other needs that will allow residents to stay in Ramona will be necessary to sustain the community over time.

*Actions*

- Investigate alternative strategies for bringing high-speed telecommunication services to Ramona's industrial/commercial areas and residential areas. This effort will involve working with local telecommunications, cable or satellite service providers (e.g., DirectTV, etc.) to increase the bandwidth of telecommunication services in Ramona, and should focus on expanding services to support home-based businesses and distance learning.

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- None.

- C. Provide Infrastructure to Proposed Industrial/Commercial Sites

*Actions*

- Prepare a strategic plan with budgets and timing for bringing infrastructure (e.g., water, sewer, power, telecommunications, roads, etc.) to industrial/ commercial sites in a timely manner once the 2020 planning process is completed.

*Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- San Diego County General Plan 2020.

## 5.1.7 Strategic Issue #7: Government Regulations

The study team has found that the government regulatory process is a continual issue when dealing with businesses or developers. Due to the complexity of this topic, the initiatives and actions highlighted below will be limited to recommendations that can be achieved within the confines of this strategy, or are pertinent issues to Ramona and its business.

**Summary of Relevant Survey Responses:** A combined total of 71.6% of the survey respondents indicated that “improved processing and approval of County permits” was very important or important to improving the climate for doing business in Ramona.

A combined total of 71.6% of the survey respondents indicated that a “simplified county permitting process” was very important or important to improving the climate for doing business in Ramona.

### Initiatives and Objectives

- A. Simplify Permitting Process - The government and regulatory environment is viewed as an impediment to sustaining and expanding business in Ramona. Unfortunately, there are many factors that contribute to this situation and many of them are beyond the control of local business and property owners. The following action is intended to take an initial step in simplifying the process for businesses in Ramona.

#### *Actions*

- Utilize County services through the San Diego County, Office of Trade and Business Development (e.g., liaison and ombudsman) to assist applicants through the permitting process.

#### *Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- San Diego County, Office of Trade and Business Development.

- B. Update County Ordinances to Encourage and Support Home-Based Businesses - While 45.3% of businesses are, according to survey respondents, “in the downtown corridor of Ramona between Etcheverry Rd. and 2<sup>nd</sup> Street,” an additional 36.0% of respondents said the majority of business operations is “out of the home outside of the Ramona downtown corridor.” These figures are likely to increase both within Ramona and elsewhere in the county as improved telecommunications services allow residents (especially those in more rural setting) to work from home or from second dwellings on their property. Consequently, Ramona should work with the county to address ordinances that may limit the opportunities for residents to work from their homes.

#### *Actions*

- Identify existing ordinances that impact home-based businesses.
- Conduct workshops on the needs of home-based businesses and the regulatory changes needed to support these businesses.
- Propose changes in regulations to encourage and support home-based businesses.

#### *Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- None.

### **5.1.8 Strategic Issue #8: Workforce Preparedness**

Workforce preparedness is an issue facing communities throughout the U.S. In order to prepare the current and future workforce to meet the demands of business, pro-active steps must be taken at the local and regional level. The following initiatives and actions focus on addressing this need:

#### Initiatives and Objectives

##### A. Prepare Ramona Residents for Current and Future Jobs

###### *Actions*

- Participate in regional and state initiatives to improve workforce preparedness at the K-12, community college and university levels.

###### *Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- None.

### **5.1.9 Strategic Issue #9: Employee Housing**

A large segment of the Ramona workforce is employed in retail and service jobs that do not pay livable wages. As housing prices increase in Ramona, many of these individuals will be unable to afford local housing and/or will be forced to work multiple jobs in order to live. Such an environment is not good for the individual, the family or the community. Consequently, the initiatives and actions highlighted below are intended to bring this issue forward.

#### Initiatives and Objectives

##### A. Maintain a Suitable Stock of Employee Housing

###### *Actions*

- Incorporate the employee housing discussion into the 2020 planning process.

###### *Other Relevant Existing, Proposed or Completed Activities*

The following studies or resources should be incorporated into this effort:

- San Diego County General Plan Update 2020
- Ramona Community Plan.

**TABLE 5.1: STRATEGIC INITIATIVES AND ACTIONS**

**Strategic Issue #1: Foster Community Collaboration**

Initiatives	Actions	Lead Agency	Existing, Proposed or Completed Activities
A. Build Consensus Amongst Participating Organizations	<ul style="list-style-type: none"> <li>• Engage a professional mediator to resolve issues and conflicts.</li> <li>• Conduct team-building exercises involving all participants.</li> <li>• Obtain commitments and support to implement strategic plan.</li> </ul>	Community Task Force with representative from the community and existing area organizations (see Initiative B).	<ul style="list-style-type: none"> <li>• San Diego County 2020 Planning Process</li> </ul>
B. Develop an Organizational Framework for Implementation	<ul style="list-style-type: none"> <li>• Establish an implementation task force comprised of representatives from key local organizations</li> <li>• Select a lead organization to coordinate implementation.</li> <li>• Define roles and responsibilities of all participants.</li> <li>• Investigate alternative legal entities for securing funding.</li> </ul>	Community Task Force	<ul style="list-style-type: none"> <li>• Previous efforts to establish a BID and Main Street Program.</li> </ul>
C. Establish a Leadership Ramona Program	<ul style="list-style-type: none"> <li>• Utilize Cal State San Marcos leadership training program.</li> </ul>	Community Task Force in collaboration with Cal State San Marcos	<ul style="list-style-type: none"> <li>• Cal State San Marcos leadership training program.</li> </ul>

**TABLE 5.1: STRATEGIC INITIATIVES AND ACTIONS (CONTINUED)**

**Strategic Issue #2: Enhance Community Identity**

Initiatives	Actions	Lead Agency	Existing, Proposed or Completed Activities
A. Maintain Rural Character through Managed Growth	<ul style="list-style-type: none"> <li>• Conduct community workshops on managed growth.</li> <li>• Support initiatives to preserve grasslands and agricultural uses balanced with meeting the commercial/industrial land needs in Ramona.</li> </ul>	Community Task Force in collaboration with San Diego County, Office of Trade and Business Development	<ul style="list-style-type: none"> <li>• San Diego County 2020 planning process.</li> <li>• Grasslands preservation efforts.</li> </ul>
B. Establish Community Gateways	<ul style="list-style-type: none"> <li>• Develop identity and signage at community gateways.</li> <li>• Build on existing tree-lined corridors leading into and through Ramona.</li> </ul>	Community Task Force in collaboration with CalTrans and San Diego County, Department of Public Works	<ul style="list-style-type: none"> <li>• Old Town Revitalization Committee.</li> </ul>
C. Establish Nodes of Community Activity	<ul style="list-style-type: none"> <li>• Continue to support the revitalization of Old Town Ramona.</li> <li>• Support Ramona Intergenerational Community Campus (RICC) as a focal point of community activity.</li> <li>• Relocate and expand library facilities to the proposed RICC.</li> </ul>	Community Task Force in collaboration with Old Town Revitalization Committee and RICC Committee	<ul style="list-style-type: none"> <li>• RICC development efforts.</li> <li>• Old Town revitalization efforts.</li> <li>• Old Town Streetscape Project.</li> <li>• Town Hall Restoration Project.</li> </ul>
D. Establish Nodes of Economic Activity	<ul style="list-style-type: none"> <li>• Continue restoration and beautification of Old Town Ramona.</li> <li>• Establish an additional node around the proposed RICC.</li> <li>• Enhance and expand commercial/industrial nodes (see Strategic Issue #5)</li> </ul>	Community Task Force	<ul style="list-style-type: none"> <li>• San Diego County 2020 planning process</li> <li>• RICC development efforts.</li> <li>• Old Town revitalization efforts.</li> <li>• Old Town Streetscape Project.</li> <li>• Town Hall Restoration Project.</li> </ul>
E. Community Beautification	<ul style="list-style-type: none"> <li>• Expand code enforcement activities.</li> <li>• Establish a façade improvement program for commercial and retail properties.</li> <li>• Develop community clean-up program along trail system.</li> </ul>	Community Task Force in collaboration with San Diego County, Office of Trade and Business Development and Department of Building and Land Use.	<ul style="list-style-type: none"> <li>• San Diego County 2020 planning process</li> </ul>
F. Expand Trail System for Equestrian, Bicycle and Pedestrian Uses	<ul style="list-style-type: none"> <li>• Investigate opportunities to establish creek-side trail system.</li> <li>• Support Ramona Equine Industry Network and other efforts to expand trail system in and around Ramona.</li> </ul>	San Diego County Department of Parks and Recreation in collaboration with Community Task Force, REIN and the Ramona Water District.	<ul style="list-style-type: none"> <li>• Ramona Community Plan</li> <li>• Ramona Trail Guide</li> <li>• REIN trail expansion efforts.</li> </ul>

**TABLE 5.1: STRATEGIC INITIATIVES AND ACTIONS (CONTINUED)**

**Strategic Issue #3: Support and Expand Community Services and Events**

<b>Initiatives</b>	<b>Actions</b>	<b>Lead Agency</b>	<b>Existing, Proposed or Completed Activities</b>
A. Investigate Opportunity 24 hour Emergency Medical Services in Ramona	<ul style="list-style-type: none"> <li>Develop a feasibility study and a subsequent plan for providing 24-hour emergency medical services in Ramona.</li> </ul>	Community Task Force	
B. Expand the Ramona library.	<ul style="list-style-type: none"> <li>See Strategic Issue #1: Initiative C.</li> </ul>		
C. Support and Expand Community Events	<ul style="list-style-type: none"> <li>Continue to support the rodeo, air show, etc.</li> <li>Investigate additional community events that build on the unique character of Ramona</li> </ul>	Ramona Chamber of Commerce	<ul style="list-style-type: none"> <li>Existing community events</li> </ul>
D. Expand recreational and community park facilities	<ul style="list-style-type: none"> <li>Develop a plan to expand existing park and establish new parks.</li> <li>Investigate additional recreational activities for area seniors and youth.</li> <li>Support and expand trail systems (see Strategic Issue #1: Initiative F).</li> </ul>	San Diego County Department of Parks and Recreations in collaboration with the Ramona Water District and REIN.	<ul style="list-style-type: none"> <li>Existing parks, facilities and programs such as the Boy’s and Girl’s Club, community center, etc.</li> </ul>

**Strategic Issue #4: Support Local Business**

<b>Initiatives</b>	<b>Actions</b>	<b>Lead Agency</b>	<b>Existing, Proposed or Completed Activities</b>
A. Provide Support to Local Businesses	<ul style="list-style-type: none"> <li>Increase awareness of existing programs and services available to local businesses.</li> <li>Work with local provider to increase high-speed telecommunications services in Ramona.</li> <li>Conduct annual survey to identify service gaps and develop supplemental services as needed.</li> </ul>	Ramona Chamber of Commerce in collaboration with the North San Diego County SBDC and the San Diego County, Office of Trade and Business Development	<ul style="list-style-type: none"> <li>Ramona Chamber of Commerce business services.</li> <li>North San Diego County SBDC programs.</li> <li>San Diego County, Office of Trade and Business Development programs.</li> <li>Other existing regional and state programs.</li> </ul>
B. Implement a Business Retention Program	<ul style="list-style-type: none"> <li>Hold annual business appreciation week with business of the year award.</li> <li>Establish and maintain a directory of Ramona businesses.</li> <li>Conduct annual business satisfaction survey.</li> </ul>	Ramona Chamber of Commerce in collaboration with the North San Diego County SBDC and the San Diego County, Office of Trade and Business Development	<ul style="list-style-type: none"> <li>Orange Book Directory</li> <li>Ramona Chamber Directory</li> </ul>

**TABLE 5.1: STRATEGIC INITIATIVES AND ACTIONS (CONTINUED)**

**Strategic Issue #5: Expand and Diversify Economic Base**

Initiatives	Actions	Lead Agency	Existing, Proposed or Completed Activities
A. Expand Inventory of Developable Industrial/Commercial Land	<ul style="list-style-type: none"> <li>• Provide input into the 2020 planning process to designate additional land for industrial/commercial development.</li> <li>• Investigate environmental mitigation opportunities.</li> <li>• Investigate opportunities for environmental mitigation.</li> </ul>	San Diego County Department of Building and Land Use and Community of Ramona.	<ul style="list-style-type: none"> <li>• San Diego County 2020 planning process.</li> <li>• Regional Technology Park: Feasibility Study</li> <li>• Industrial Market Analysis: Ramona Airport Master Plan</li> <li>• Ramona Community Plan</li> </ul>
B. Integrate Ramona into Regional Business Attraction and Expansion Efforts	<ul style="list-style-type: none"> <li>• Develop inventory of commercial/industrial properties.</li> <li>• Prepare a map of commercial/industrial properties with infrastructure overlays.</li> <li>• Prepare information package highlighting Ramona as a place to do business.</li> <li>• Participate in regional business attraction efforts.</li> </ul>	Ramona Chamber of Commerce in collaboration with local real estate professional, San Diego County, Office of Trade and Business Development and the San Diego Regional EDC	<ul style="list-style-type: none"> <li>• Ramona Chamber of Commerce efforts.</li> <li>• San Diego County, Office of Trade and Business Development efforts.</li> <li>• San Diego Regional EDC efforts.</li> </ul>
C. Provide Infrastructure to Proposed Industrial/Commercial Sites	<ul style="list-style-type: none"> <li>• See Strategic Issue #6: Initiative C below.</li> </ul>		
D. Expand Recreational and Tourism Business Opportunities in Ramona	<ul style="list-style-type: none"> <li>• Continue to promote recreational assets and community events.</li> <li>• Expand trail system (see Issue #2, Initiative F)</li> <li>• Build on area’s suitability for equine related events and activities.</li> <li>• Evaluate the feasibility of increasing the number of hotel/motel rooms.</li> <li>• Evaluate opportunities to develop a joint (regional) Tourism Development and Marketing Plan.</li> <li>• Improve directions signage to points of interest</li> </ul>	Ramona Chamber of Commerce in collaboration with the North County and San Diego Convention & Visitors Bureaus, and REIN	<ul style="list-style-type: none"> <li>• North County Convention &amp; Visitors Bureau services and web site.</li> <li>• San Diego Convention &amp; Visitors Bureau services and web site.</li> <li>• Ramona Chamber of Commerce information area and services.</li> <li>• Ramona Mall web site.</li> <li>• REIN activities and Equine Survey and Report, August 2000.</li> <li>• Tourism Development and Marketing Plan, Borrego Springs, California</li> </ul>

**TABLE 5.1: STRATEGIC INITIATIVES AND ACTIONS (CONTINUED)****Strategic Issue #6: Transportation and Infrastructure**

<b>Initiatives</b>	<b>Actions</b>	<b>Lead Agency</b>	<b>Existing, Proposed or Completed Activities</b>
A. Improve Automobile and Pedestrian Circulation in Ramona	<ul style="list-style-type: none"> <li>• Prepare a traffic and pedestrian circulation plan with consideration of economic impacts on the community.</li> <li>• Support proposed Highway 67 expansion.</li> </ul>	Community Task Force in collaborations with CalTrans and San Diego County Department of Public Works	<ul style="list-style-type: none"> <li>• San Diego County 2020 planning process</li> <li>• Ramona Community Plan</li> </ul>
B. Improve High-Speed Telecommunication Services in Ramona	<ul style="list-style-type: none"> <li>• Investigate alternative strategies for bringing high-speed telecommunication services to Ramona industrial/commercial areas and residential areas for home-based businesses.</li> </ul>	Ramona Chamber of Commerce	
C. Provide Infrastructure to Proposed Industrial/Commercial Sites	<ul style="list-style-type: none"> <li>• Prepare a strategic plan with budgets and timing for bringing infrastructure (e.g., water, sewer, power, telecommunications, roads) to industrial/ commercial sites in a timely manner.</li> </ul>	Ramona Water District in collaboration with CalTrans and San Diego County Department of Public Works	<ul style="list-style-type: none"> <li>• San Diego County 2020 planning process</li> <li>• Ramona Community Plan</li> <li>• Industrial Market Analysis: Ramona Airport Master Plan</li> </ul>

**Strategic Issue #7: Government Regulations**

<b>Initiatives</b>	<b>Actions</b>	<b>Lead Agency</b>	<b>Existing, Proposed or Completed Activities</b>
A. Simplify Permitting Process	<ul style="list-style-type: none"> <li>• Utilize County services through the San Diego County, Office of Trade and Business Development (e.g., liaison and ombudsman) to assist applicants through the permitting process.</li> </ul>	San Diego County, Office of Trade and Business Development in collaboration with Community Task Force	San Diego County, Office of Trade and Business Development ombudsman and permit assistance programs.
B. Update County Ordinance to Encourage and Support Home Based Businesses	<ul style="list-style-type: none"> <li>• Identify existing ordinances that impact home based businesses.</li> <li>• Conduct workshops on the needs of home based businesses and the regulatory changes needed to support these businesses.</li> <li>• Proposed changes in regulations to encourage and support home based businesses.</li> </ul>	Community Task Force in collaboration with San Diego County, Office of Trade and Business Development and San Diego County Department of Building and Land Use	

**TABLE 5.1: STRATEGIC INITIATIVES AND ACTIONS (CONTINUED)**

**Strategic Issue #8: Workforce Preparedness**

Initiatives	Actions	Lead Agency	Existing, Proposed or Completed Activities
A. Prepare Ramona Residents for Current and Future Jobs	<ul style="list-style-type: none"> <li>Participate in regional and state initiatives to improve workforce preparedness at the K-12, community college and university levels.</li> </ul>	Ramona School Board in collaboration with the Community Task Force	

**Strategic Issue #9: Employee Housing**

Initiatives	Actions	Lead Agency	Existing, Proposed or Completed Activities
A. Maintain a Suitable Stock of Employee Housing	<ul style="list-style-type: none"> <li>Incorporate employee-housing discussion into the 2020 planning process.</li> </ul>	San Diego County Department of Building and Land Use and San Diego County Department of Housing and Community Development	<ul style="list-style-type: none"> <li>San Diego County 2020 planning process</li> <li>Ramona Community Plan</li> </ul>

**TABLE 5.1: STRATEGIC INITIATIVES TIMELINE**

**Strategic Issue #1: Foster Community Collaboration**

Initiatives	Actions	Proposed Timeline For Implementation	Potential Sources of Funding
A. Build Consensus Amongst Participating Organizations	<ul style="list-style-type: none"> <li>• Engage a professional mediator to resolve issues and conflicts.</li> <li>• Conduct team-building exercises involving all participants.</li> <li>• Obtain commitments and support to implement strategic plan.</li> </ul>	<p style="text-align: center;">Year 1</p> <p style="text-align: center;">Year 2 and ongoing</p> <p style="text-align: center;">Year 1</p>	<ul style="list-style-type: none"> <li>• U.S. Department of Housing and Urban Development CDBG Program</li> <li>• Private investment</li> <li>• Private foundations</li> </ul>
B. Develop an Organizational Framework for Implementation	<ul style="list-style-type: none"> <li>• Establish an implementation task force comprised of representatives from key local organizations</li> <li>• Select a lead organization to coordinate implementation.</li> <li>• Define roles and responsibilities of all participants.</li> <li>• Investigate alternative legal entities for securing funding.</li> </ul>	<p style="text-align: center;">Year 1</p> <p style="text-align: center;">Year 1</p> <p style="text-align: center;">Year 1</p> <p style="text-align: center;">Year 2 to 3</p>	<ul style="list-style-type: none"> <li>• CDBG</li> <li>• Private investment</li> <li>• Private foundations</li> </ul>
C. Establish a Leadership Ramona Program	<ul style="list-style-type: none"> <li>• Utilize Cal State San Marcos leadership training program.</li> </ul>	<p style="text-align: center;">Year 2 and ongoing</p>	<ul style="list-style-type: none"> <li>• Private investment</li> <li>• Volunteer and In-kind support</li> </ul>

**TABLE 5.1: STRATEGIC INITIATIVES TIMELINE (CONTINUED)**

**Strategic Issue #2: Enhance Community Identity**

Initiatives	Actions	Proposed Timeline For Implementation	Potential Sources of Funding
A. Maintain Rural Character through Managed Growth	<ul style="list-style-type: none"> <li>Conduct community workshops on managed growth.</li> <li>Support initiatives to preserve grasslands and agricultural uses balanced with meeting the commercial/industrial land needs in Ramona.</li> </ul>	<p>Year 1 and ongoing</p> <p>Year 1 and ongoing</p>	<ul style="list-style-type: none"> <li>San Diego County, Office of Trade and Business Development budget</li> <li>CDBG</li> <li>Private investment</li> <li>Private foundations</li> </ul>
B. Establish Community Gateways	<ul style="list-style-type: none"> <li>Develop identity and signage at community gateways.</li> <li>Build on existing tree-lined corridors leading into and through Ramona.</li> </ul>	<p>Year 2 to 5</p> <p>Ongoing</p>	<ul style="list-style-type: none"> <li>T-21 funds.</li> <li>CDBG</li> <li>San Diego County</li> <li>Private investment</li> </ul>
C. Establish Nodes of Community Activity	<ul style="list-style-type: none"> <li>Continue to support the revitalization of Old Town Ramona.</li> <li>Support Ramona Intergenerational Community Campus (RICC) as a focal point of community activity.</li> <li>Relocate and expand library facilities to the proposed RICC.</li> </ul>	<p>Ongoing</p> <p>Ongoing</p> <p>Years 5 to 8</p>	<ul style="list-style-type: none"> <li>CDBG</li> <li>San Diego County</li> <li>Private investment</li> <li>Private foundations</li> <li>Volunteer and In-kind support</li> </ul>
D. Establish Nodes of Economic Activity	<ul style="list-style-type: none"> <li>Continue restoration and beautification of Old Town Ramona.</li> <li>Establish an additional node around the proposed RICC.</li> <li>Enhance and expand commercial/industrial nodes (see Strategic Issue #5)</li> </ul>	<p>Ongoing</p> <p>Years 5 to 8</p> <p>Years 5 to 8</p>	<ul style="list-style-type: none"> <li>CDBG</li> <li>San Diego County</li> <li>Private investment.</li> <li>Private foundations.</li> <li>Volunteer and In-kind support</li> </ul>
E. Community Beautification	<ul style="list-style-type: none"> <li>Expand code enforcement activities.</li> <li>Establish a façade improvement program for commercial and retail properties.</li> <li>Develop community clean-up program along trail system.</li> </ul>	<p>Years 2 and ongoing</p> <p>Years 3 to 5</p> <p>Years 2 to 3</p>	<ul style="list-style-type: none"> <li>CDBG</li> <li>San Diego County</li> <li>Private investment.</li> <li>Private foundations.</li> <li>Volunteer and In-kind support</li> </ul>
F. Expand Trail System for Equestrian, Bicycle and Pedestrian Uses	<ul style="list-style-type: none"> <li>Investigate opportunities to establish creek-side trail system.</li> <li>Support Ramona Equine Industry Network and other efforts to expand trail system in and around Ramona.</li> </ul>	<p>Ongoing</p> <p>Ongoing</p>	<ul style="list-style-type: none"> <li>CDBG</li> <li>San Diego County</li> <li>Private investment.</li> <li>Private foundations.</li> <li>Volunteer and In-kind support</li> </ul>

**TABLE 5.1: STRATEGIC INITIATIVES TIMELINE (CONTINUED)**

**Strategic Issue #3: Support and Expand Community Services and Events**

Initiatives	Actions	Proposed Timeline For Implementation	Potential Sources of Funding
A. Investigate Opportunity 24 hour Emergency Medical Services in Ramona	<ul style="list-style-type: none"> <li>Develop a feasibility study and a subsequent plan for providing 24-hour emergency medical services in Ramona.</li> </ul>	Years 3 to 5	<ul style="list-style-type: none"> <li>CDBG</li> <li>Private investment</li> <li>Volunteer and In-kind support</li> </ul>
B. Expand the Ramona library.	<ul style="list-style-type: none"> <li>See Strategic Issue #1: Initiative C.</li> </ul>	Years 5 to 8	<ul style="list-style-type: none"> <li>CDBG</li> <li>Private investment</li> </ul>
C. Support and Expand Community Events	<ul style="list-style-type: none"> <li>Continue to support the rodeo, air show, etc.</li> <li>Investigate additional community events that build on the unique character of Ramona</li> </ul>	Ongoing	<ul style="list-style-type: none"> <li>Transient Occupancy Tax (TOT).</li> <li>North County and San Diego Convention &amp; Visitors Bureau budgets</li> <li>Private investment</li> <li>Volunteer and In-kind support</li> </ul>
D. Expand recreational and community park facilities	<ul style="list-style-type: none"> <li>Develop a plan to expand existing park and establish new parks.</li> <li>Investigate additional recreational activities for area seniors and youth.</li> <li>Support and expand trail systems (see Strategic Issue #1: Initiative F).</li> </ul>	Years 2 to 3  Years 2 to 5  Ongoing	<ul style="list-style-type: none"> <li>San Diego County parks and recreation funds.</li> <li>Private investment</li> <li>Ramona Water District</li> <li>Volunteer and In-kind support</li> </ul>

**Strategic Issue #4: Support Local Business**

Initiatives	Actions	Proposed Timeline For Implementation	Potential Sources of Funding
A. Provide Support to Local Businesses	<ul style="list-style-type: none"> <li>Increase awareness of existing programs and services available to local businesses.</li> <li>Work with local provider to increase high-speed telecommunications services in Ramona.</li> <li>Conduct annual survey to identify service gaps and develop supplemental services as needed.</li> </ul>	Year 1  Year 1 to 3  Year 2 and ongoing	<ul style="list-style-type: none"> <li>Ramona Chamber budget.</li> <li>North San Diego County SBDC programs budget.</li> <li>San Diego County, Office of Trade and Business Development budget.</li> <li>Private investment</li> <li>Volunteer and In-kind support.</li> <li>CDBG</li> </ul>
B. Implement a Business Retention Program	<ul style="list-style-type: none"> <li>Hold annual business appreciation week with business of the year award.</li> <li>Establish and maintain a directory of Ramona businesses.</li> <li>Conduct annual business satisfaction survey.</li> </ul>	Year 2 and ongoing  Ongoing  Year 2 and ongoing	<ul style="list-style-type: none"> <li>Ramona Chamber Budget</li> <li>Volunteer and In-kind support.</li> <li>Private sector investment.</li> </ul>

**TABLE 5.1: STRATEGIC INITIATIVES TIMELINE (CONTINUED)**

**Strategic Issue #5: Expand and Diversify Economic Base**

Initiatives	Actions	Proposed Timeline For Implementation	Potential Sources of Funding
A. Expand Inventory of Developable Industrial/Commercial Land	<ul style="list-style-type: none"> <li>• Provide input into the 2020 planning process to designate additional land for industrial/commercial development.</li> <li>• Investigate environmental mitigation opportunities.</li> <li>• Investigate opportunities for environmental mitigation.</li> </ul>	Ongoing	<ul style="list-style-type: none"> <li>• Volunteer and In-kind support</li> </ul>
B. Integrate Ramona into Regional Business Attraction and Expansion Efforts	<ul style="list-style-type: none"> <li>• Develop inventory of commercial/industrial properties.</li> <li>• Prepare a map of commercial/industrial properties with infrastructure overlays.</li> <li>• Prepare information package highlighting Ramona as a place to do business.</li> <li>• Participate in regional business attraction efforts.</li> </ul>	Year 3 to 5	<ul style="list-style-type: none"> <li>• Ramona Chamber budgets</li> <li>• San Diego County, Office of Trade and Business Development budgets</li> <li>• San Diego Regional EDC budgets.</li> <li>• Private Investment from land owners and real estate companies</li> </ul>
C. Provide Infrastructure to Proposed Industrial/Commercial Sites	<ul style="list-style-type: none"> <li>• See Strategic Issue #6: Initiative C below.</li> </ul>		
D. Expand Recreational and Tourism Business Opportunities in Ramona	<ul style="list-style-type: none"> <li>• Continue to promote recreational assets and community events.</li> <li>• Expand trail system (see Issue #2, Initiative F)</li> <li>• Build on area’s suitability for equine related events and activities.</li> <li>• Evaluate the feasibility of increasing the number of hotel/motel rooms.</li> <li>• Evaluate opportunities to develop a joint (regional) Tourism Development and Marketing Plan.</li> <li>• Improve directions signage to points of interest</li> </ul>	<p>Ongoing</p> <p>Ongoing</p> <p>Ongoing</p> <p>Years 5 to 5</p> <p>Years 3 to 5</p> <p>Years 2 to 3</p>	<ul style="list-style-type: none"> <li>• Transient Occupancy Tax (TOT)</li> <li>• U.S. Department of Housing and Urban Development CDBG Program</li> <li>• Volunteer and In-kind support</li> <li>• Private Investment</li> </ul>

**TABLE 5.1: STRATEGIC INITIATIVES TIMELINE (CONTINUED)**

**Strategic Issue #6: Transportation and Infrastructure**

<b>Initiatives</b>	<b>Actions</b>	<b>Proposed Timeline For Implementation</b>	<b>Potential Sources of Funding</b>
A. Improve Automobile and Pedestrian Circulation in Ramona	<ul style="list-style-type: none"> <li>• Prepare a traffic and pedestrian circulation plan with consideration of economic impacts on the community.</li> <li>• Support proposed Highway 67 expansion.</li> </ul>	Years 1 to 3	<ul style="list-style-type: none"> <li>• CDBG</li> <li>• San Diego County</li> <li>• T-21 funding</li> </ul>
B. Improve High-Speed Telecommunication Services in Ramona	<ul style="list-style-type: none"> <li>• Investigate alternative strategies for bringing high-speed telecommunication services to Ramona industrial/commercial areas and residential areas for home-based businesses.</li> </ul>	Years 1 to 3	<ul style="list-style-type: none"> <li>• CDBG</li> <li>• Private telecommunications providers</li> </ul>
C. Provide Infrastructure to Proposed Industrial/Commercial Sites	<ul style="list-style-type: none"> <li>• Prepare a strategic plan with budgets and timing for bringing infrastructure (e.g., water, sewer, power, telecommunications, roads) to industrial/ commercial sites in a timely manner.</li> </ul>	Year 3 to 5	<ul style="list-style-type: none"> <li>• CDBG</li> <li>• CalTrans</li> <li>• Ramona Water District</li> <li>• Private Investment</li> </ul>

**Strategic Issue #7: Government Regulations**

<b>Initiatives</b>	<b>Actions</b>	<b>Proposed Timeline For Implementation</b>	<b>Potential Sources of Funding</b>
A. Simplify Permitting Process	<ul style="list-style-type: none"> <li>• Utilize County services through the San Diego County, Office of Trade and Business Development (e.g., liaison and ombudsman) to assist applicants through the permitting process.</li> </ul>	Ongoing	San Diego County, Office of Trade and Business Development budget
B. Update County Ordinance to Encourage and Support Home Based Businesses	<ul style="list-style-type: none"> <li>• Identify existing ordinances that impact home based businesses.</li> <li>• Conduct workshops on the needs of home based businesses and the regulatory changes needed to support these businesses.</li> <li>• Proposed changes in regulations to encourage and support home based businesses.</li> </ul>	Ongoing	San Diego County, Office of Trade and Business Development budget

**TABLE 5.1: STRATEGIC INITIATIVES TIMELINE (CONTINUED)**

**Strategic Issue #8: Workforce Preparedness**

Initiatives	Actions	Proposed Timeline For Implementation	Potential Sources of Funding
A. Prepare Ramona Residents for Current and Future Jobs	<ul style="list-style-type: none"> <li>Participate in regional and state initiatives to improve workforce preparedness at the K-12, community college and university levels.</li> </ul>	Year 1 and ongoing	<ul style="list-style-type: none"> <li>CalWorks</li> <li>Employment Training Panel</li> <li>Private Foundations.</li> </ul>

**Strategic Issue #9: Employee Housing**

Initiatives	Actions	Proposed Timeline For Implementation	Potential Sources of Funding
A. Maintain a Suitable Stock of Employee Housing	<ul style="list-style-type: none"> <li>Incorporate employee-housing discussion into the 2020 planning process.</li> </ul>	Year 1 and ongoing	<ul style="list-style-type: none"> <li>CDBG</li> <li>Health and Human Services</li> <li>Private Foundations</li> </ul>



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## **APPENDIX A: SUMMARY OF COMMUNITY AND BUSINESS SURVEY**

A sample of the survey instrument used for this study is presented on the following pages.

(Insert Survey Page 1)

(Insert Survey Page 2)

(Insert Survey Page 3)

(Insert Survey Page 4)



## **APPENDIX B: RAMONA BASELINE ECONOMIC ANALYSIS**

### **1.0 OVERVIEW AND MAJOR FINDINGS**

#### **1.1 Overview**

This section discusses economic factors such as population, employment, and business activity for the community of Ramona. The project team analyzed payroll variations for specific industries, employment growth in Ramona industries, and trends in business activity as measured by the number of firms per industry in the Ramona area. This analysis also looks at sales tax trends in order to identify business segments that are stagnant, stable or expanding. For the purposes of this analysis, California Employment Development Department (EDD) data proved to be the most reliable data source. Additional, comparative sources include U.S. Census County Business Patterns, Claritas and Dun & Bradstreet databases, and data from the San Diego Association of Governments (SANDAG).

#### **1.2 Major Findings**

- Ramona had an increase of 26.3% in employment since 1991, outpacing both San Diego County (16.8%) and the State of California (11.6%). Of that total, the retail trade sector (1347 jobs) comprised the largest share of employment in 1998, followed by the services sector (1063 jobs) and the mining and construction sector (872 jobs). Government employment was deemed to be minimal in Ramona and was not included in this analysis.
- Despite growth in Ramona's economy over the past decade, Ramona has lost 844 wholesale and manufacturing jobs, while adding only 98 agricultural, and 353 retail jobs, which typically pay less than manufacturing jobs. Ramona has also seen a significant increase (310) in construction jobs, which is typically a volatile industry sector and lagged in the formation of service-based jobs (123). This trend, if it continues, could result in an unstable economic base for the community and erode wage levels of local households.
- From 1991 to 2000, Ramona had an estimated population growth of 17%. In comparison, Poway, El Cajon, and San Diego County grew at slightly slower rates. According to the California Employment Development Department, population projections indicate that Ramona will continue to grow as fast as it did in the two previous decades.
- The retail sector is the largest sector in both San Diego County and Ramona in terms of taxable sales, followed by the manufacturing, and business services sector. Total taxable sales grew 32 percent in Ramona from 1991 to 2000, compared to 43 percent in San Diego County. The lag in sales tax revenue would indicate that many residents are making significant purchases outside the area.

### **2.0 STATE OF CALIFORNIA AND SAN DIEGO COUNTY ECONOMIC TRENDS**

Comparison of local economic trends with surrounding areas provides the context in which to evaluate microeconomic influences such as employment trends, payroll trends, and business activity. Trends in California employment can be compared to a smaller region such as San Diego County in order to identify employment characteristics specific to the County. Similarly, trends for the County can have a direct influence on the microeconomics of the sub-regions of the County such as Ramona. In addition, comparative analysis of Ramona's economy with other communities and municipalities in the county and throughout the state provide contextual benchmarks for measuring the health of Ramona's economy.

From 1991 to 1998, San Diego County employment growth (17%) was stronger than the aggregate growth rate of jobs for the State of California (11.6%). Employment positions in San Diego County grew from approximately 804,000 in 1991 to approximately 939,000 total employees by the end of 1998.

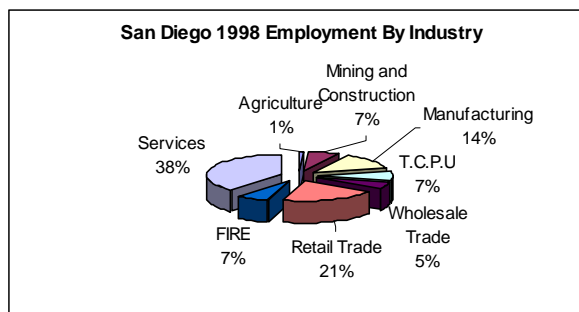
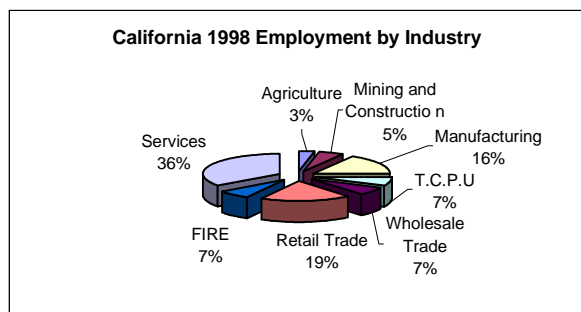
By contrast, the State of California experienced an increase of approximately 1.3 million jobs during the same time period, from 10.7 million employees to 12 million total employees in private sector employment. This increase in California employment was not consistent over the seven-year period. During 1992 and 1993, while the national economy experienced a recession, California employment declined an average of 1.3% per year. However, in 1994, statewide employment figures recovered and then continued to increase through 1997 with the biggest single year jump (3.9%) occurring from 1997 to 1998.

Despite dips in the early 1990's, in 1995 both California and San Diego employment rebounded to above 1991 levels. San Diego County's economy outpaced California, increasing 1.3% from 1991 to 1995, which is almost double California's 0.7% increase during the same period. From 1995 to 1998, San Diego County increased total employment 15%, with significant one-year increases of approximately 6% occurring from 1996 to 1997 and from 1997 to 1998. In contrast, California employment only increased 11% from 1995 to 1998 and 3.3% from 1996 to 1997 and 3.9% from 1997 to 1998.

San Diego County was the source of 938,500 jobs at the end of 1998, accounting for 7.8% of California job market. As Figures B.1 and B.2 reveal, the services sector (4,224,317 jobs in California and 359,600 jobs in San Diego County) comprised the largest share of employment in both San Diego County and the State of California during 1998. These jobs in the services sector represent 36% of total job market in California and 38% of the market for San Diego County.

**Figure B.1: California Employment**

**Figure B.2: San Diego County Employment**



Source: State of California Employment Development Department

In San Diego County, the services sector is followed by the retail trade sector (201,100 jobs) and the manufacturing sector (127,600 jobs). The finance, insurance and real estate sector (65,000 jobs); the transportation, communications and public utility sector (63,900 jobs); the mining and construction sector (62,100 jobs); and the wholesale trade sector (48,300 jobs) constitute a smaller, but significant share (26%) of the countywide total as well. The agriculture sector constitutes the remaining 10,600 jobs, or 1.1%, of the County employment base. Despite having stronger industry shares in the mining and construction, retail, finance, insurance and real estate (FIRE) and services sectors, San Diego County employment trends were consistent with the employment figures for California in the transportation, communications, and public utilities sector, differing by only .4%. Conversely, all remaining sectors in San Diego County showed a significantly lower concentration of employment than California.

The distribution of sales between retail, manufacturing, and business services was generally consistent in San Diego County 1990 to 2001, with a shift of no more than 3 percent over the decade in any sector. In 1991 the retail sector accounted for 77 percent of the taxable sales, followed by the manufacturing sector with 13 percent, the business services sector at 9 percent, and non-store retailers at 1 percent. In 2000, the distribution of sales between each sector shifted only slightly with the retail sector making up 76 percent of total sales, followed again by the manufacturing sector at 14 percent, the business services sector with 9 percent and non-store retailers with 1 percent.

### 3.0 OVERVIEW OF THE RAMONA ECONOMY

Like other communities, Ramona is not exempt from the forces of economic change. Every community sooner or later must wrestle with the unexpected or painful effects of change on local industries and employers. Over the past decade, Ramona’s economic base has changed – seeing an increased number of jobs in some industries, while experiencing declines in other industries. Key elements of Ramona’s economy include population, employment and unemployment, taxable sales, local businesses, and payroll. The following sections explore and compare each of these elements of Ramona’s economy with similar benchmarks in surrounding communities.

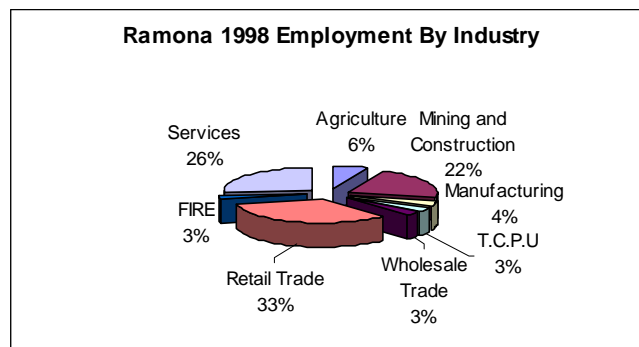
#### 3.1 Population

From 1990 to 2000, Ramona’s population grew rapidly compared to other areas in San Diego County. Ramona’s estimated 2000 population represents a 17% percent increase from 1990.<sup>18</sup> In comparison, San Diego County experienced a 12.6 percent increase, while Poway (10.4%) and El Cajon (7.0) each experienced slower growth rates. One probable explanation for this trend is Ramona’s emergence as a small semi-rural “bedroom community” of the larger cities in San Diego County. Located approximately 40 minutes Northeast of downtown San Diego along Highway 67, the Ramona labor force supplies a significant portion of the economic engines of neighboring towns, such as Poway.

#### 3.2 Employment

Ramona had 4,058 employment positions at the end of 1998. This represents a 26% increase from the 1991 total. As Figure B.3 reveals, the retail trade sector (1,347 jobs) comprised the largest share of employment in 1998, followed by the services sector (1,063 jobs) and the mining and construction sector (872 jobs). The agriculture sector and manufacturing sector constitute a smaller, but significant share (10.4%) of Ramona’s total jobs. As shown in Figure B.3, the other sectors constitute the remaining 133 jobs, or 8.7%, of Ramona’s employment base. Importantly, Ramona exhibits a greater concentration than the State of California and San Diego County in the agriculture, mining and construction, and retail industries.

**Figure B.3: Ramona Employment by Industry**



<sup>18</sup> U.S. Census Bureau. Claggett Wolfe Associates used U.S. Census Bureau population estimates to standardize analytical data sources and evaluate growth trends, not absolute population counts. Ramona’s actual population may be somewhat higher than the U.S. Census estimate.

Employment trends indicate Ramona's employment base is growing. According to U.S. Census estimates, Ramona had 4,058 employment positions at the end of 1998. As seen in Table B.1, this represents a 21% increase (844 jobs) between 1991 and 1998. The wholesale trade sector and the durable manufacturing sector experienced losses, constituting a 33 percent decline in employment in both industries. Overall these losses were offset by significant employment growth in the other sectors, especially, the retail trade (353 jobs) sector, representing a 27% increase, and the mining and construction (310 jobs) sector, representing a 35% increase. The agriculture, forestry, and fishing industries combined experienced a net increase of 98 jobs, or 39%. Despite the decline in durable manufacturing, nondurable manufacturing experienced a 45% employment increase in jobs. The transportation, communications, and utilities sector (28%), FIRE (6%), and the services sector (12%) also experienced significant gains.

**TABLE B.1: EMPLOYMENT TRENDS BY SECTOR FOR RAMONA (1991-1998)**

INDUSTRY	1991	1998	'91 - '98	'91 - '98 % Change
Total	3,214	4,058	844	21%
Ag., Forestry, & Fishing	156	254	98	39%
Mining & Construction	562	872	310	35%
Manufacturing-Durable	168	112	-56	-33%
Manufacturing-Nondurable	31	56	25	45%
TCU	100	138	38	28%
Wholesale Trade	171	115	-56	-33%
Retail Trade	994	1,347	353	27%
FIRE	96	102	6	6%
Services	937	1,063	126	12%

Source: California Employment Development Department

This positive job growth trend was complemented by a similarly strong increase in average total payroll (29%), from \$15.6 million in 1991 to \$20.1 million in 1998. A fifteen- percent increase in area firms during this period, from 517 to 594, is an attributing factor to these positive trends.

### 3.3 Unemployment

According to the U.S. Census Bureau, Ramona currently has 7,570 participants in the labor force, with an unemployment rate of 2.6%. This low unemployment rate is consistent with the unadjusted unemployment rates of 2.7 percent for the San Diego County Metropolitan Statistical Area (MSA) and 4.8 percent for the State of California for the same time period. As shown in Table B.2, other cities and communities in San Diego County (Poway [1.7%], El Cajon [3.2%], and Lakeside [2.5%]) had comparable unemployment rates with Ramona.

**TABLE B.2: UNEMPLOYMENT RATE COMPARISONS**

Area Name	Labor Force	Employment	Unemployment	
			Number	Rate
Ramona	7,570	7,380	190	2.6%
Poway	27,070	26,610	460	1.7%
Lakeside	23,000	22,430	570	2.5%
El Cajon	49,280	47,690	1,590	3.2%
San Diego County	1,412,100	1,374,700	37,400	2.7%

Source: California Employment Development Department

### 3.4 Taxable Sales

Under California law, taxable trade is one of the most important sources of local revenues. Total sales in Ramona grew by almost 32 percent from 1991 to 2000, compared to 43 percent during the same period in San Diego County.<sup>19</sup> As shown in Table B.3, the distribution of taxable sales among industry sectors remained constant in San Diego County from 1991 to 2000. Although Ramona’s distribution of taxable sales was similar to San Diego County, the manufacturing sector gained ground on the retail sector. The retail sector’s share of total taxable sales in Ramona shrunk from 78 percent in 1991 to 75 percent in 2000, while the manufacturing sector’s share grew 4% during the same period to 24 percent. A more detailed look at each industry sector is provided in Section 4.0, Industry Sector Analysis, of this baseline economic analysis.

**TABLE B.3: DISTRIBUTIONS OF TAXABLE SALES**

	1991		2000	
	Ramona	San Diego County	Ramona	San Diego County
Retail Sector	78%	76%	75%	76%
Manufacturing Sector	20%	14%	24%	14%
Business Services	1%	9%	1%	9%
Non-Store Retailers	.4%	1%	1%	1%

According to combined data provided by the California Employment Development Department, and Hinderliter, de Llamas and Associates, Ramona’s average sales per establishment grew 21 percent from 1991 to 1998 in constant dollar terms.

### 3.5 Establishment Trends

In 1998, Ramona’s economic base consisted of 594 business establishments, a 13% increase from the 1991 total of 517. As revealed in Table B.4, the services (184 businesses) sector constituted the largest share of total businesses for Ramona in 1998, followed by the mining and construction (129 businesses) and the retail trade (110 businesses) sectors.

Similar to employment growth, the services sector (31 businesses) and retail trade (23 businesses) sectors experienced the largest gains in establishment counts between 1991 and 1998. In fact, these two sectors comprise 46.6% of the overall Ramona growth in establishments. Although the mining and construction sector experienced an average growth of only two firms from 1991 to 1998, the 133 firms in this sector at the end of the fourth quarter in 1998 represents the second largest number of firms in any one sector. Ramona’s other industry sectors each experienced marginal changes in number of firms, with the wholesale trade sector experiencing a loss of two firms during the evaluation period.

<sup>19</sup> Taxable sales for 1991 are adjusted for inflation using the consumer price index published by the Bureau of Labor Statistics.

**TABLE B.4: FIRM TRENDS BY SECTOR RAMONA (1991-1998)**

INDUSTRY	1991	1998	'91 – '98	'91 – '98 % Change
<b>Total</b>	<b>517</b>	<b>594</b>	<b>77</b>	<b>13%</b>
Ag., Forestry, & Fishing	43	56	12	23%
Mining & Construction	127	129	2	2%
Manufacturing-Durable	20	19	-1	-
Manufacturing-Nondurable	9	11	2	19%
TCU	20	26	6	13%
Wholesale Trade	23	21	-2	-
Retail Trade	87	110	23	21%
FIRE	35	40	5	12.5%
Services	153	184	31	17%

Source: California Employment Development Department

### 3.6 Payroll

Ramona's total payroll increased from approximately \$15.6 million in 1991 to more than \$20 million in 1998, representing a growth rate of 29 percent. As Table B.5 shows, the largest increase occurred in the agriculture industry (86 percent), followed by the transportation, communications, power and utilities sector (65 percent), and the mining and construction (49 percent). Retail trade grew 27 percent from \$3,573,020 in 1991 to \$4,526,497 in 1998, while total payroll for the manufacturing sector declined 15 percent, from \$1,098,184 in 1991 to \$928,417 in 1998. Despite the overall decline in the manufacturing sector, payroll for non-durable manufacturing businesses increased 190 percent from \$132,484 to \$385,407.

**TABLE B.5: PAYROLL CHANGES BY SECTOR IN RAMONA (1991 - 1998)**

MAJOR INDUSTRY	1991 AVG. PAYROLL	1998 AVG. PAYROLL	PERCENT CHANGE
Agriculture, Forestry, Fishing	\$ 601,101	\$ 1,115,410	86%
Mining and Construction	\$ 4,137,974	\$ 6,176,765	49%
Manufacturing	\$ 1,098,184	\$ 928,417	-15%
Trans, Comm., Elec., Gas, Sanitary Services	\$ 697,981	\$ 1,149,127	65%
Wholesale Trade	\$ 991,852	\$ 862,725	-13%
Retail Trade	\$ 3,573,020	\$ 4,526,497	27%
Finance, Insurance, Real Estate	\$ 486,596	\$ 496,525	2%
Services	\$ 4,027,541	\$ 4,879,284	21%
<b>Total</b>	<b>\$ 15,614,250</b>	<b>\$ 20,134,751</b>	<b>29%</b>

In 1998, mining and construction was the leading industry in terms of total payroll with approximately 31% of the total area dollars or approximately \$6.2 million dollars. The service industry (24 percent) was the second largest contributor of payroll in Ramona during 1998, followed by the retail sector, with 22 percent. In 1998, the sector comprised of finance, insurance, and real estate (FIRE) reported the lowest payroll with only \$496,525 or less than 3% of the area's total payroll.

## 4.0 INDUSTRY SECTOR ANALYSIS

Although the retail sector plays a dominant role in the economies of Ramona and San Diego County, manufacturing businesses are also important contributors to both economies. As Table B.6 shows, employment in Ramona is distributed relatively evenly among the retail (33 percent), manufacturing (35 percent), and business service (29 percent) sectors, however the retail sector accounts for 75 percent of the taxable sales.<sup>20</sup> San Diego County employment is distributed among retail (21 percent), manufacturing (27 percent), and business services (45 percent), yet, the retail sector brings in 76 percent of the county’s taxable sales. This section looks at trends in each of these industry sectors and identifies some of the driving forces affecting Ramona’s economy.

**TABLE B.6: COMPARISON OF DISTRIBUTION OF EMPLOYMENT (1998)  
AND TAXABLE SALES (2000)**

Area	Employment (1998)				Taxable Sales (2000)			
	Retail	Mftg.	Bus Ser.	Non-Ret	Retail	Mftg.	Bus Ser.	Non-Ret
<b>Ramona</b>	<b>33%</b>	<b>35%</b>	<b>29%</b>	<b>3%</b>	<b>75%</b>	<b>24%</b>	<b>1%</b>	<b>1%</b>
San Diego County	21%	27%	45%	7%	76%	14%	9%	1%
California	19%	31%	42%	7%	Figures unavailable			

### 4.1 Retail Trade Sector

Retail is by far the leading employment sector in the Ramona area, with over 33% of the area's total employment in 1998 employing 1,347 employees. This percentage far outpaces the industry share for San Diego County (21.4%) and the State of California (19.4%). In addition to the highest concentration of employment in the area, retail employment has shown an increase of 35.6% from 1991 to 1998 or from 994 employees to 1,347 employees.

In terms of taxable sales, service stations were the largest contributor to the retail sector from 1991 to 2001, providing roughly 20 percent of this sector’s sales. In 1991, service stations accounted for almost 22 percent taxable sales in the retail sector and 17 percent of taxable sales for all sectors. A likely explanation for service stations providing such a large share of taxable sales is that many Ramona residents who work in other San Diego communities buy gas at their destination location (i.e., Ramona), and not where they work. Although the total contribution of service stations rose during the decade, the overall percent contribution to the retail sector declined slightly to 19 percent.

Discount department stores is the next largest contributor to the retail sector. The opening of Kmart in 1991 most likely impacted the retention of local sales tax. This sub-sector represented 15 percent of the total retail sector in Ramona in 1991. However, by 2000 discount department stores made up only 11.6 percent of the retail sector.

Grocery store liquor sales and sales from drug stores grew more rapidly than any of the other sectors during the decade. Liquor sales at Ramona grocery stores making up 5.8 percent of the retail sector in 1991, grew 57 percent by 2001, representing 10 percent of Ramona’s retail sector. Another major contributor to Ramona’s retail sector is drug store sales, which accounted for 1.2 percent of Ramona’s retail sector in 1991. Drug store sales grew to almost 4 percent by 2001.

<sup>20</sup> For comparative analysis, Claggett Wolfe Associates grouped the eight industry categories used in Tables 2.1, 2.2, and 2.3 into the four major business categories defined by the State Board of Equalization to compare employment trends with trends in taxable sales. Finance, insurance, and real estate are grouped under business services, while agriculture, mining and construction, and wholesale trade are grouped under manufacturing. Transportation, communications, and public utilities are grouped under Non-Store & Part Time Retailers, while the retail sector remains unchanged.

## 4.2 Manufacturing Sector

Although negative, the manufacturing industry also experienced fluctuating employment patterns from 1991 to 1998. With a yearly average of 199 employees in 1991, the manufacturing sector decreased to an average of only 168 employees in 1998, which represents a 15.6% decrease. However not all manufacturing sectors declined from 1991 to 1998; despite durable manufacturing employment declines of 33.7%, non-durable manufacturing increased 83.9% from an annual average of 31 employees to 56 employees. This growth outpaces San Diego County's non-durable manufacturing employment increases of 25.6% during the same period. However durable manufacturing employment decreased 33.7% in Ramona while County rates decreased only 10.4%. Furthermore, durable manufacturing employment in Ramona represented 84% of the total manufacturing employment in 1991 decreasing to 66% in 1998, while durable manufacturing employment in San Diego County represented 78% of the total manufacturing employment in 1991 decreasing to 72% in 1998.

In terms of taxable sales, the sale of lumber and building materials dominate Ramona's manufacturing sector. In 1991, lumber and building materials was the second largest contributor to the manufacturing sector with \$81,001 (34.7 percent of the manufacturing sector). By 1993, lumber and materials became the largest provider of taxable sales in Ramona with \$163,962, representing 59 percent of the sales in the manufacturing sector. Sales in this sub-sector continued to rise throughout the decade, and by the beginning of 2001, the sale of lumber and building materials accounted for \$255,892 in total sales, or 64.8 percent of the manufacturing sector. During the same period taxable sales from contractors declined 75 percent from 1991 to 2001.

## 4.3 Services Sector

With 26 percent of the total of employment, the service sector is second only to retail (33%) in terms of its percentage of total employment in the Ramona area. However, the gap was significantly smaller in 1998 than in 1991 when the service sector represented 29% of the total employment while retail employment represented 31% of the total employment. In addition, the percentage of employment in this sector in the Ramona area is also significantly lower than San Diego County (38.3%) and the State of California (35.2%). Furthermore, average total employment in the service sector increased 13.4% from 937 to 1,063 employees from 1991 to 1998, while County employment in the service sector increased at a much faster pace (31%). In terms of taxable sales, the service sector accounted for only 1 percent of total sales in Ramona from 1991 to 2001.

## 4.4 Other Sectors

*Mining and Construction:* Construction employment expanded by 55.3% between 1991 and 1998 or from 562 to 872 annual average employees. This was by far the fastest growing industry sector in Ramona, outpacing the second highest, T.C.P.U. by 45.21%. Mining and construction employment also represented 21.5% of the total Ramona employment, reflecting a greater concentration of mining and construction jobs in Ramona than in San Diego County and the State of California as a whole.

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<sup>21</sup> TCPU employment growth increased 38.1% from 1991 to 1998, whereas mining and construction increased 45% faster at 55.3%.

*Transportation, Communications, and Public Utilities (T.C.P.U.):* From 1991 to 1998, the T.C.P.U. sector experienced a 38.1% increase in employment, going from an annual average of 100 employees in 1991 to 138 employees in 1998 (the second fastest growing sector to mining and construction). Even with this increase, T.C.P.U. employment still accounted for 3.4% of the total employment in the area, which is more than 50% below the figures for this sector in both San Diego County (6.8%) and the State of California (7.2%). Payroll in the T.C.P.U. sector exhibited the most growth from 1991 to 1998, increasing 64.6% or from \$697,981 to \$1,149,127.

*Wholesale:* Wholesale employment declined 33.1% from 1991 to 1998 or from 171 employees to 115 employees. Furthermore, wholesale made up 5.3% of the total employment in 1991 and only 2.8% in 1998. This is a decrease of 47%; far outpacing County declines of approximately 4% or from 5.3% to 5.1% of the total employment during the same period.

*Finance, Insurance and Real Estate (FIRE):* From 1991 to 1997 employment in the FIRE sector increased 6.2% from an average of 96 to 102 employees. Despite this slight increase, the FIRE sector decreased its share of total employment from 2.9% to 2.5% of the total employment from 1991 to 1998.

## **5.0 SUMMARY**

Ramona has been experiencing fairly strong economic growth over the past decade. However, there is some reason for concern regarding the types of jobs that are created. Over the past decade, Ramona has lost approximately 844 wholesale and durable manufacturing jobs. During the same period, Ramona added approximately 353 service and retail jobs, which typically pay less than manufacturing jobs. This trend, if it continues, could erode wage levels of local households.

Population trends indicate that Ramona has been growing faster than the rest of San Diego County for the past decade. If this trend should continue over the next decade, the pressure for new housing development and commercial/industrial development will be felt by already stressed infrastructure constraints such as limited water and sewer capacity. Employment trends and taxable sales indicate that this expansion will most likely be in the retail trade and light manufacturing sectors. As a result, there will be an increased demand for workers with solid education and skills, particularly in white-collar occupations. At a minimum, there will be an increased expectation for more comprehensive training and skills development.



## **APPENDIX C: ASSESSMENT OF COMMERCIAL AND INDUSTRIAL LAND NEEDS**

### **1.0 OVERVIEW**

One of the broader objectives of an economic development strategy is to provide guidelines for creating and maintaining a suitable environment for residents to live and work in the community. In meeting this objective, it is important to evaluate the opportunities of creating employment for local residents such that economic wealth is retained in the community, and undesirable conditions such as commuting, air pollution, etc. are minimized. To this end, the project team undertook an analysis of the Ramona area to determine the commercial and industrial land needs that may best support the type of community Ramona should evolve into as determined by its current residents and business owners.

The analysis that follows is a preliminary assessment of the amount and type of land that will be needed to support Ramona's current and future workforce. The approach used in this analysis is based on a number of preliminary assumptions that are highlighted below. These assumptions should continue to be refined in the future as the economic conditions within Ramona and the surrounding region evolve.

- Ramona will strive to provide a wide range of livable wage employment to its residents
- Ramona will work to retain, establish, expand, and attract a diverse range of businesses that have limited impact on the local environment and provide livable wage employment
- Ramona will work to retain, establish, expand, and attract a diverse range of businesses that export goods and services to regional, national and global markets, thus increase the wealth generated within the community
- Ramona will work to reduce the number of residents commuting to jobs outside of the community to 20% of the total workforce to mitigate the impacts on local roadways and the environment

The discussion that follows looks at the current and future demands for employment that will be generated by Ramona residents, and the subsequent types of land that will be needed to house businesses that can provide such employment. This is followed by an assessment of the current inventory of commercial and industrial land within Ramona that may be available to meet this need. Utilizing the findings from both of these sections, the project team developed a preliminary estimate of the following:

- Ramona's ability to satisfy current and future needs with existing land inventory, and
- Ramona's need for additional commercial and industrial land to support Ramona's local workforce

The information resulting from this analysis will be integrated into the economic development strategy to assist Ramona and San Diego County in establishing economic development policies and programs to accommodate, support, and nurture local business development.

### **1.1 Assessment of Additional Employment Needs in Ramona**

A key to measuring the economic sustainability of a local community is to measure the level of local employment for residents in the community versus the need for residents to seek employment in outside locations. In an effort to balance their local economy, communities will seek to create jobs for their citizens, in part, to prevent them from commuting to outlying jobs, foster the retention of economic wealth, and thereby raise the quality of life for residents. The need to create jobs for local residents stems from the desire to provide this more balanced lifestyle. Commonly referred to as a jobs/housing balance, this serves as a principal component of California's efforts to manage growth throughout the state.

Determining the need for additional local employment opportunities for residents in Ramona was somewhat challenging. To derive this number, the project team first assumed that those residents currently employed by Ramona businesses did not create additional demand for employment and that this level of local employment would persist in the future.<sup>22</sup> Secondly, the project team assumed that the unemployment level of 3.4% in Ramona would also not create additional demand for local employment, and that future workforce projections account for a similar level of unemployment.<sup>23</sup> With these two groups addressed, the only remaining group of local workers consists of those individuals who currently are not (or in the future will not) be able to find employment in Ramona due to a lack of local jobs.<sup>24</sup> Consequently, the remainder of this discussion will focus on this group.

In determining the need for future commercial, office and industrial related jobs in Ramona, the project team focused on the local workforce that would exist when the community is fully built out to a population of 52,000. Based on historic figures and an assessment of surrounding communities, the project team estimated that 45% of the population (or 23,400 individuals) would comprise the local Ramona workforce.<sup>25</sup> Of these workers, it is estimated that 12% (or 2,808) will be sole proprietors (or single business owners) with businesses in Ramona, and the remaining 88% (or 20,592) will be employees (or local workforce). Taking a further step, the project team estimated that 20% (or 4,118) of the local workforce would commute out of Ramona for various reasons (e.g., salary, compatibility of skills and experience, advancement opportunities, etc.).<sup>26</sup> In addition, the project team estimated that the current level of 4,058 local employees would remain constant in the future.<sup>27</sup> The resulting tabulation (see Table C.1) showed that an estimated 12,416 new local jobs would have to be created in Ramona to serve the local workforce that would exist once the population of Ramona reaches 52,000.

Using the 12,416 figure as the base, the project team continued the analysis by estimating the breakdown of these new jobs by employer's industry<sup>28</sup> with shares of total new industry employment and total number of employees for each sector distributed as shown in Table C.2.

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<sup>22</sup> Based on anecdotal information gathered from interviews conducted by Claggett Wolfe Associates, the project team is aware that Ramona residents employed locally may be underemployed (i.e., residents with higher skills have chosen to take lower paying, lower skilled jobs in order to remain in Ramona). However, the extent of this underemployment is unknown and could not be integrated into the analysis.

<sup>23</sup> Generally 4% unemployment is considered full employment in the U.S. under normal economic conditions. A figure below 4% would indicate that there is no need to increase employment opportunities to absorb these individuals.

<sup>24</sup> It is understood that many local workers will chose not to work in Ramona due to various reasons (i.e., pay scale, compatibility with worker skills and experience, opportunities for advancement, etc.). This situation is incorporated into the analysis and discussed further in this section.

<sup>25</sup> Based on an evaluation of 1990 Census Data that reported a workforce of 46% of population. This figure is slightly lower than some surrounding communities due in part to Ramona's retirement population.

<sup>26</sup> Based on traffic flow data compiled by Cal-Trans in 1999 on morning outflows and evening inflows during peak work commute hours, the project team found that approximately 5,000 workers are currently leaving Ramona daily for jobs in other areas. The proposed figure of 4,118 offers a 17% decrease from current levels.

<sup>27</sup> 1998 California Employment Development Department data for industry employment in Ramona.

<sup>28</sup> Employer's industry refers to industries that will use this type of business space. For example, business services and retail are both industries that may require commercial space.

**Table C1: Tabulation of Estimated Employment Need in Ramona**

<b>Build-Out Population</b>	<b>52,000</b>
Total Employment @ 45% of Population	23,400
<i>Minus Sole Proprietors @ 12% =</i>	<u>-2,808</u>
<i>Equals 88% industry employment</i>	20,592
Industry Employment Including Out Flow	20,592
<i>Minus Outflow @ 20% Industry Employment</i>	<u>-4,118</u>
Ramona Local Industry Employment	16,474
<i>Minus Current Industry Employment*</i>	<u>-4,058</u>
<b>Future Ramona Local Employment Need</b>	<b>12,416</b>

\*Source: 1998 EDD Industry Employment for Ramona

The “shares of employment” column, in Table C.2, reflects the mix of new employment opportunities that would be generated from pro-active economic development policies and programs for business retention, formation, expansion and attraction implemented by the community of Ramona and the County of San Diego.<sup>29</sup> Commercial, office, wholesale and manufacturing jobs are the most likely candidates that would typically benefit from pro-active economic development policies and programs. Examples of types of jobs within each category are highlighted below:

- Commercial – retail sales clerks, bank tellers, customer service representatives, store managers, printers, locksmiths, restaurant workers, optometrists, etc.
- Office – administrative assistants, office managers, clerks, dentists, doctors, computer operators, accountants, professional services, paralegals, insurance agents, government workers, etc.
- Wholesale – Purchasing managers and buyers, administrative support workers, inventory managers; sales and marketing workers; operators, fabricators, sales representatives, mechanics, installer, electronic technicians, equipment operators, packers, etc.
- Manufacturing – electrical and mechanical engineers, scientists, technicians, precision assemblers, inspectors, testers, machinists, operators, material handlers, packers, mechanics, technicians, plant managers, delivery drivers, sales representatives, general managers, human resources specialists, etc.

As shown in Table C.2, the community of Ramona places less emphasis on retail/commercial development. Low wage scales for these types of jobs and the likelihood that retail employment in Ramona will not increase as significantly as other types of employment are contributing factors to this pattern. Additional contributing factors include the low number of workers needed per square foot of retail space, the existing base of local retail employment, and the competitive forces from surrounding communities (i.e., Poway, Mira Mesa, Carmel Mountain, Escondido, El Cajon, and Santee). For the purpose of enhancing economic conditions in Ramona, the project team emphasized employment that would be generated by manufacturing, office and wholesale employer’s industry sectors. The economic development efforts to stimulate business growth to support Ramona’s build-out population would therefore focus on providing jobs in a similar mix.

<sup>29</sup> The project team assumed that the distribution of current employment (e.g., commercial, office, wholesale and manufacturing) in Ramona would remain constant in the future.

**Table C.2: Composition of New Jobs At Build-Out Population**

Industry Groups	Share of Employment	Total Employees
Commercial	15%	1,862
Office	25%	3,164
Wholesale	20%	2,483
Manufacturing	40%	4,966
<b>Total</b>	<b>100%</b>	<b>12,416</b>

As with any economic development strategy, projected employment opportunities will as economic conditions change. Technological advancements such as the Internet and the resulting evolution of eCommerce will continue to shape the economic landscape now and into the future. The distribution of employment by industry group presented in Table C.2 reflects some of these changes that will be refined further as this economic development strategy is completed. However, Ramona and San Diego County will have to adjust this distribution in the future to reflect changing economic conditions. To date, Ramona has been reactive, letting business and employment evolve on its own. The business and employment mix can be shaped by pro-active economic development efforts for business retention, formation, expansion and attraction. Although Ramona may undergo a “graying” of the population over the next 20 years, the population shift will most likely not be so drastic as to eliminate the demand for jobs. The population mix will more likely shift to reflect local employment opportunities due to the regular turnover of the local population. The project team analyzed existing property inventory in Section 1.2 and used this analysis as a foundation for assessing Ramona’s ability to support local employment in Section 3.

## 1.2 Existing property Assessment

The project team conducted a field survey of existing commercial, office and industrial properties in the community to determine the amount of currently zoned land available for business development and therefore potential job creation in Ramona. The various land types were evaluated for development potential and then analyzed for development type. Existing properties fell under the following categories:

- General commercial – This category would support retail and service type businesses operating in retail settings (e.g., computer service, copy centers, etc.).
- Office – This category would support finance, insurance, real estate and government uses. This category would also support service type businesses operating in an office setting (e.g., software development, Internet-related businesses, etc.).
- Industrial – This category would support light industrial, manufacturing and wholesale type businesses including eCommerce type businesses, which may require small offices with small attached warehouse space.

Most commercial parcels exist in the Ramona downtown corridor, which for this analysis, extends from 3<sup>rd</sup> Street to Etcheverry Street, from Raymond Avenue to La Brea Street and from E Street to A Street. Most of the industrial parcels exist either west of the downtown corridor or surrounding the Ramona airport. Although other areas in Ramona may exist to accommodate businesses to support job growth, only the parcels identified in the downtown corridor, and in the industrial areas to the west of downtown and near the airport were utilized in this analysis.

During its assessment, the project team found a lack of existing vacant office properties and a lack of land zoned for office use in the downtown corridor. Since land zoned as general commercial can also support this type of development, the project team chose to allocate 25% of the existing general commercial land for future office development purposes. The remaining 75% of available general commercial land was allocated to support regular commercial development (as defined above).

To further refine its analysis, the project team determined, for each land use, whether existing properties were constrained by environmental issues or if the properties were vacant and unconstrained. Properties constrained by environmental issues were removed from consideration, and unconstrained vacant properties were identified and assumed to be developable. To determine the total possible square feet of development for these properties, the project team used the following site coverage ratios <sup>30</sup>.

- Commercial land – 35% site coverage ratio
- Office land – 40% site coverage ratio
- Industrial land – 35% site coverage ratio

Once the potential coverage ratio for new buildings was determined, a ratio of employees per square foot was calculated using industry standards for commercial, office and industrial developments.<sup>31</sup> These figures were used to calculate the number of new local jobs that could be created if the existing unconstrained commercial, office and industrial properties in Ramona were developed. In relation to the discussion of a sustainable community or a jobs/housing balance in Section 1.1, these hypothetical job numbers reveal how many Ramona workers could potentially work in the community they live in, should jobs exist for them. Using the approach and figures outlined above, the project team compiled the following information for Ramona.

**Table C.3: Commercial/Office Acreage**

Land Description	Acres	% of Total
Total Vacant Commercial/Office Acres <sup>32</sup>	58	100%
(Less Acres Constrained by Trees)	-15	26%
(Less Acres Constrained by Vernal Pools) <sup>33</sup>	-6	10%
(Less Acres Constrained by both Trees and Vernal Pools)	-7	12%
Total Unconstrained Acres	30	52%

### 1.3 ABSORPTION of Employment Needs from Existing Properties in Ramona

The discussion that follows highlights the ability of Ramona to create employment opportunities for its local workforce with the current inventory of unconstrained general commercial, office and industrial use land. Information used in this analysis was derived from Section 1.1 and 1.2.

<sup>30</sup> A site coverage ratio is the area of land covered by the footprint for the building. A 35% coverage ratio simply means that a building will cover 35% of the available land. Parking areas are not included in the building area.

<sup>31</sup> The methodology used to calculate employees per square foot is described in Appendix A at the end of this report.

<sup>32</sup> This figure included the 25% of existing land zoned general commercial that was allocated to office land use as discussed earlier in this section.

<sup>33</sup> Source: “Potential Vernal Pool Parcel Map.” Department of Planning and Land Use, San Diego County. February 15, 2000.

Based on the methodology outlined in the previous sections, Ramona has an existing base of 146 unconstrained acres of vacant land, consisting of 30 general commercial and office acres and 116 industrial acres. This property has the potential for creating opportunities for 2,769, or 22%, of the estimated 12,416 jobs (see Table C.1) that will be needed to support Ramona's workforce. The above figures assume that the available land is built-out into commercial, office and industrial uses according to the guidelines presented in Table C.2 and that the available land would be allocated to business uses that are targeted as promoting jobs for the community. Although the community cannot necessarily predict which businesses are going to locate on each parcel, as part of an overall economic development strategy, the community can seek to provide the land types, and develop programs and policies that will encourage economic growth in the desired direction.

**Table C.4: Commercial and Office Job Creation**

Type of Land	Industry Land Share	Total Industry Acres	Weighted Sq./Ft. Per Employee	Total Sq./Ft.	Coverage Ratio	Total Jobs Created
Commercial	75%	22.5	2,097	980,100	0.35	164
Office	25%	7.5	239	326,700	0.4	547
Total	100%	30.0	-	1,306,800	-	711

### 1.3.1 Commercial Land Development

Commercial land that may be developed for either office or commercial uses represents 30 acres of the available vacant land in the study area. At build-out, 711 jobs could be created with 547, or 77%, representing jobs requiring office development space. The remaining 146, or 23%, of the possible jobs would be in jobs requiring some form of commercial space.

Although commercial space would be expected to occupy 75% of the available 30 acres, the 25% of office space, which was allocated for strategic purposes, results in considerably more jobs. This is due to the more land intensive nature of commercial developments over office uses on a per employee basis. This can be seen by the difference in the weighted square footage of space needed per employee, where one employee per 2,097 square feet of building space is typical for commercial development, while one employee per 239 square feet of space is needed for office development.<sup>34</sup> Analysis indicates the new businesses occupying the commercial acreage in Ramona would represent approximately 1,306,800 square feet of commercial and office structures. It is understood that the actual development mix may differ from this scenario. However, these numbers give a good indication of how many jobs could be created given an economic development strategy that reflects growth in higher skilled and higher wage industries.

### 1.3.2 Industrial Land Development

Land could also be developed for industrial job creation. Table C.4 demonstrates the breakdown of the unconstrained, vacant industrial land that can be built-out for manufacturing and wholesale uses. Although other types of businesses may demand industrial acreage, the project team assumes that economic development efforts will increase the likelihood that manufacturing and wholesale businesses will demand all the available industrial acreage. Under this scenario, 2,058 jobs could occupy the existing vacant, industrial acreage, with 1,415, or 69%, representing manufacturing jobs and 643, or 31%, representing wholesale jobs. These jobs would be housed in over 5 million square feet of building structures.

<sup>34</sup> A discussion on square footage per employee is located under the Methodology section in Appendix A.

**Table C.5: Industrial Job Creation**

Type of Land	Industry Land Share	Total Industry Acres	Non-Weighted Sq./Ft. Per Employee	Total Sq./Ft.	Lot Coverage Ratio	Total Jobs Created
Manufacturing	60%	69.6	750	3,031,776	0.35	1415
Wholesale	40%	46.4	1100	2,021,184	0.35	643
Total	100%	116	-	5,052,960	-	2058

The impact of the industrial land development would be significant, with 74% of potential jobs from the current land inventory being created on just the unconstrained 116 acres of vacant land in the community. Based on a preliminary assessment by the project team, jobs in these industrial groups are the type more likely to assist in meeting the needs of the local workforce, thus limiting the level of workforce commuting to other areas for employment.

#### 1.4 Land Needs to Support Non-Absorbed Employment in Ramona

The discussion above indicated that the current land inventory of 146 acres could only absorb 2,769 of the 12,416 jobs needed to support Ramona’s current and future local workforce. The discussion that follows looks at the additional land that will be needed to provide local employment for the additional 9,647 workers that will exist in Ramona at a build-out population of 52,000. The goal of providing land in Ramona to meet future job needs was discussed in Section 1.1.

To calculate land needs, the project team used the allocation of future space needs based on the employer’s industry breakdown presented in Table C.2. These employer industries were then matched with specific land uses that would support businesses in these industries. A separate calculation was performed for sole proprietors.<sup>35</sup> In performing this calculation, it was assumed that current proprietors were being supported by existing commercial, office and industrial space in Ramona. In addition, it was estimated that only 50% of the new sole proprietorships that might be established in the future would need commercial, office or industrial space. A break down of the space needs of sole proprietorships was distributed as follows:

- Commercial – 40% of the sole proprietors requiring space would need commercial space.
- Office – 60% of the sole proprietors requiring space would need commercial space.

Future business space needs in Ramona will, in part, reflect the economic development policies and programs of the community. The above categories and those presented in Table C.2 are an indication of where efforts for future economic development and land development should be focused to both, support future business growth and provide for higher-level employment in the community. These distributions serve as the basis for the analysis that follows.

Using the approach outlined in this report, the project team expanded the analysis to address the current and future workforce that would not be absorbed with Ramona’s current property inventory. Based on this analysis, the following additional land will be needed to support Ramona’s workforce. An overview of these figures and the various components used to derive them is presented in Tables C.6 through C.9.

<sup>35</sup> Sole proprietors are individuals that conduct their business as a sole owner, and typically, sole operator. These business owners may eventually grow and require additional business space. Due to the difficulty in measuring solely-owned businesses, they are separated here from other, larger businesses. For this analysis, sole proprietors are assumed to demand commercial and office space only.

In addition to the existing 146 acres of vacant land, another 607 acres is needed to support creation of new local jobs resulting from industry employment and from sole proprietorships. The aggregate amount of needed land is 753 acres. As shown in Table C.6, 561 of the additional 607 acres are needed for industry development. The most intensive need for this land will be in the following employment categories:

**TABLE C.6: LAND NEEDED TO SUPPORT INDUSTRY EMPLOYMENT**

Categories	Acres
Acres for businesses requiring commercial space	199
Acres for businesses requiring manufacturing space	190
Acres for businesses requiring wholesale space	139
Acres for businesses requiring office space	33
<b>Total acres needed for industry employment (non-sole proprietorship)</b>	<b>561</b>

As shown in Table C.7, forty-six of the additional 607 acres is needed to support sole proprietorships. The most intensive need for these acres will be in the following categories:

**TABLE C.7: LAND NEEDED TO SUPPORT SOLE PROPRIETORSHIPS**

Categories	Acres
Acres for businesses requiring commercial space	40
Acres for businesses requiring office space	6
<b>Total Acres needed for sole proprietorships</b>	<b>46</b>

The share of employment for each Ramona industry group is proportional to the size and distribution of the community's overall industrial mix. For instance, the wholesale industry accounts for 1,929 jobs or 20% of the community's industrial base. Table C.8 shows the share of employment for each industry and the total number of employees in each industry. These industry group employment shares are the basis for calculating the amount of land needed to support Ramona's industrial base.

**TABLE C.8: FUTURE LAND NEEDS TO SUPPORT RAMONA LOCAL INDUSTRY EMPLOYMENT**

Employer's Industry	Land Needs by Industry					
	Share of Employment	Total Employees	Weighted Sq./Ft Per Employee*	Buildings Total Sq./Ft	Coverage Ratio	Total Acres Needed
Commercial	15%	1,447	2,097	3,034,338	0.35	199
Office	25%	2,412	239	576,384	0.40	33
Wholesale	20%	1,929	1,100	2,122,252	0.35	139
Manufacturing	40%	3,859	750	2,893,980	0.35	190
<b>Total</b>	<b>100%</b>	<b>9,647</b>	<b>-</b>	<b>3,610,722</b>	<b>-</b>	<b>561</b>

\*Wholesale and Manufacturing figures are un-weighted

**Table C.9: Future Land Needs to Support Sole Proprietorships<sup>36</sup>**

Land Needs of Sole Proprietorships						
Proprietor's Industry	Industry Share	Total Employees	Weighted Sq./Ft Per Employee	Buildings Total Sq./Ft	Coverage Ratio	Total Acres Needed
Commercial	40%	291	2097	610,367	0.35	40
Office	60%	437	239	104,347	0.40	6
<b>Total</b>	<b>100%</b>	<b>728</b>	<b>-</b>	<b>714,714</b>	<b>-</b>	<b>46</b>

As outlined above, Ramona will need to allocate an additional 607 acres for commercial, office and industrial development. This represents the land apportionment needed to generate a local employment distribution that reflects an economic development strategy emphasizing job creation in the local economy. Future retail jobs are accounted for in the 1,447 employees of the commercial industry sector. Future retail job growth will continue, but will represent less of the total overall Ramona employment. This is due to the emphasis of economic development programs that support more diverse job creation at higher livable wages, as discussed throughout this analysis.

Future general commercial development will likely be flexible business park space for small- to medium-tenants in employer industries listed above; uses will likely reflect a ranges of sizes and types of businesses including small- to medium-sized indoor storage/warehousing and light manufacture/repair for computer and electronic services and sales, among others. Some office development will likely be incorporated into flexible business park development where tenants can have strictly office space or a combination of office space and shell space to house small warehouse/storage needs and light-industrial space.

## 1.5 Summary and Conclusions

With a population of 52,000 at build-out, the community of Ramona must have strong new job growth to support its local workforce. Policies and programs surrounding economic development and land use should be designed to retain, establish, expand and attract businesses of the job-generating business types discussed in Section 1.1. Economic development programs should be created to support these new businesses and to facilitate growth in the local economy.

As discussed above, one of the goals of a healthier local economy is a balance of jobs and housing. The objective is to eliminate the outflow of residents and their subsequent economic wealth to economies outside the local community. While this loss of labor results in stronger economic growth in outside communities, the community providing housing to the workforce is left to hopefully capture some of the economic benefit of local purchases of products and services. If the distant workplaces of the local residents also provide a large array of retail and service businesses, then often times the loss of the local purchases is inevitable. Consequently, there is a considerable loss of both labor and purchases. This is considered a “leakage” in economic terminology. The term is fitting for the economic benefit that leaks from one community into another.

<sup>36</sup> Only 50% of sole proprietors are assumed to need future space for business expansion. The actual number of sole proprietors is expected to be 1,456 new sole proprietors.

The community of Ramona has leakages of employment to other communities, due in large part to the lack of local employment opportunities for its residents. The loss of labor not only has the effect of removing economic benefits, but given the need for residents to commute to other job locations, it places stress on the local road infrastructure, increases the environmental impacts in the region (e.g., air pollution, fuel consumption, raw materials consumption in the form of tires and automobile parts, etc.) and deteriorates the quality of life for those who spend significant time commuting to and from work. The continued trend of providing housing locally, but jobs remotely places increasing stress on all aspects of the Ramona community. By creating jobs locally, through the development of new businesses and the expansion of existing businesses, Ramona can create more economic balance and begin to reverse this trend. To this end, Ramona should work to allocated an additional 607 acres of land for commercial, office, wholesale and manufacturing uses.

## **APPENDIX C.1 SQUARE FOOT PER EMPLOYEE**

Calculations of space requirements per employee are derived from industry-specific estimates formulated by the Urban Land Institute. For this analysis, the amount of square footage needed for each property type was weighted based on the distribution of projected industry employment. Commercial and office uses were weighted to account for some overlap in the businesses that might require these property types. Not accounting for the differences in the uses would have skewed the numbers, thereby changing the results for land demand in the final analysis.

## APPENDIX C.2 EXISTING VACANT LAND - METHODOLOGY

The purpose of the vacant land survey was to determine how much land the community of Ramona currently had available for commercial, office and industrial development. Identification of the properties was accomplished through the use of four sources:

- A walking survey of parcels conducted by Claggett Wolfe Associates
- Parcel data provided by SANDAG
- Parcel data provided by the San Diego County Assessor
- Information provided by the local real estate community

The vacant parcels were tied to their existing land use under the current Land Use Element of the San Diego County General Plan. Inconsistencies were discovered in the content of each of the data sources, where feasible, attempts to correct the information were made.

The individual parcels were evaluated for their development potential through the review of environmental maps and through conversations with public officials at the County of San Diego and at the Ramona Airport. Several issues surrounding the development potential of some industrial and general commercial property types exist, due mainly to environmental concerns and constraints. Major constraints affecting future industrial development at the Ramona Airport are the Kangaroo Rat and Fairy Shrimp. Airport officials who were contacted regarding County-owned industrial land, stated that most of the land is considered “critical” by the U.S. Department of Fish and Wildlife and is considered undevelopable at this time. Some options may exist for future mitigation of affected lands through the purchase and conservation of other land in the surrounding area, but the additional concerns over adequate infrastructure, such as sewer, combined with the need for costly ground leases, have led the project team to remove 110 acres of County-owned industrial land from this analysis due to its limited development potential.

Some commercial land surrounding the downtown corridor is also affected by environmental concerns, due mainly to floodplains or the existence of older growth trees. Where possible, only developable properties or developable portions of properties are considered in the land use totals during this analysis. Vacant residential land is not used in this analysis due to the limited use of this property type in job creation.

The potential of rezone or redevelopment of properties in the downtown corridor was not analyzed here. The uncertainty of these actions make it difficult to measure the amount of potential new developable land, although it should be noted that properties may become available to support further job growth in the future should they be rezoned to a use of general commercial, industrial or office use.

Given the limitations on time and breadth of this analysis, the project team determined that an in-depth Ramona property survey would be beyond the scope of this report.

## APPENDIX D: RAMONA AREA COMPETITIVE ANALYSIS

### INTRODUCTION

Forces and decisions that occur in surrounding communities often affect small, rural communities like Ramona. If Ramona is to maintain its rural community character and create expanded opportunities for economic development, it should recognize its position relative to surrounding communities and maximize its competitive advantages. Ramona must also be aware of and improve conditions that influence the business climate of the community, which is just as important to maintaining community character and expanding economic opportunities. This chapter highlights several factors that affect the strength of Ramona in relation to three nearby competitive communities: Poway, Lakeside and El Cajon.

Claggett Wolfe Associates established a framework for evaluating Ramona's competitive advantage using four issues that Ramona residents and business owners identified as important during interviews, focus groups, and direct survey. The five main elements of this competitive analysis are:

- Crime Rate
- Housing
- Education
- Water and Sewer Capacity

The continued maintenance and development of these factors affect the quality of life and economic potential of Ramona residents and business owners. Efficient management of these factors could impact the community's ability to create a positive environment in which to live and work.

### CRIME

Freedom from crime is an important element of promoting a desirable business environment. A low crime rate is a positive factor to attract and retain businesses as well as to maintain the high standards for the superior quality of life found in Ramona. According to a recent survey conducted to identify Ramona's community and business needs, residents and business owners think that Ramona is a safe place to live and work.<sup>37</sup> 76 percent of Ramona residents who participated in the survey indicated that they were satisfied with the responsiveness of the County Sheriff's department to crime in the community. This positive characteristic can be promoted to enhance the Ramona's reputation.

Ramona's crime rate, compared to nearby communities, also reflects the safety of doing business in Ramona. The San Diego Sheriff's Department, Crime Analysis Division provided detailed crime statistics, by type, for each police jurisdiction in the County using an incident based reporting system. These crimes are classified in the following groups: aggravated violent, burglary, larceny/theft, motor vehicle theft, and property crime. For the purposes of this report, the 5 categories have been collapsed into 3 sections. Table D.1 reveals the crime rate for each section in Ramona and two of the surrounding localities considered to have strong competition with Ramona.

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<sup>37</sup> Ramona Area Survey conducted by Claggett Wolfe Associates in March 2001.

**TABLE D.1: CRIME RATE COMPARISON, 2000**

	Ramona	Lakeside	Poway
Violent Crime	60	200	101
Non-violent Crime	118	197	201
Theft	224	399	462
Other	412	854	823
TOTAL	814	1650	1587

The unincorporated community of Ramona had 814 offenses in 2000, translating into a crime rate of 2.5 percent of crimes per estimated population. This crime rate is slightly lower than the crime rate in the surrounding communities of Lakeside and Poway, averaging approximately 5.9 percent. The largest disparity lies between Ramona and Lakeside, with Lakeside (8.4 percent) averaging almost 4 times the number of offenses per population. In terms of crimes that most affect businesses (non-violent and theft crimes), Ramona averaged the lowest rate (0.9 percent) of the three communities, followed by Poway (1.3 percent), and Lakeside (3.0 percent). Poway however, had the highest percentage of crimes that most effect businesses at 41%, followed by Ramona with 40% and Lakeside with 36%.

**HOUSING STOCK**

According to the U.S. Census Bureau, the unincorporated area of Ramona had 5,131 housing units in 1999, constituting 0.5% of the total housing in San Diego County. Since this data was derived from the 2000 Census, detailed data as to what types of housing units exist to date is not yet available. Thus, it is necessary to revert to the 1990 Census data for interpretation. In this section, the following housing data has been analyzed for Ramona, Poway, El Cajon, and Lakeside: type of units, age of structure, median monthly housing costs, and value of owner-occupied homes.

**Comparative Profile – Norco**

Like Ramona, Norco is an animal-keeping, equestrian-oriented community situated along the Interstate 15 freeway in Western Riverside County. The city’s 25,000 residents enjoy over 400 acres of parkland and 88 miles of horse trails. Hidden Valley Golf Club lies amidst three natural boulder strewn canyons.

Norco is a prosperous town. In 1999, Norco’s median income was \$71,717 as compared to a median income of \$53,066. Its existing homes, nearly all designated for animal or horse raising, have the Inland Empire’s highest median value of \$219,000, compared to \$166,300 in Ramona.

Unlike Ramona, Norco plays host to three sophisticated high technology organizations. The U.S. Naval Warfare Assessment Division is responsible for assessing the reliability of naval weapon’s systems and the combat readiness of the Fleet. Dyncorp, a defense contractor, supports it. Wyle Laboratories is a research and testing facility for aerospace, defense, energy and advanced technology firms. Also, Riverside Community College’s western campus and applied technology center is in the city.

	Ramona	Norco
Population Growth (1900-2000)	17%	3.7%
Median Income		\$71,717
Unemployment (1998)	2.6%	3.2%
Housing Value	\$166,300	\$219,000

*Structure Type:* In 1990, the Census data illustrated that Ramona, as a Census Designated Place (CDP), consisted of 4,405 total housing units; this represents a 16.5% increase in total housing units from 1990. One-unit structures accounted for 62.1% of the community-wide total, and only 0.3% of the countywide total. In contrast, the percentage of one-unit structures in other competitive areas such as Lakeside (0.8%), Poway (1.2%), and El Cajon (1.5%), were slightly higher than Ramona's percentage of the San Diego County total housing units. Since these areas are simply outlying communities and cities of the large metropolitan area of San Diego, these figures seem representative of the rural areas.

The second most concentrated type of housing provided in Ramona, Lakeside, and Poway are multi-unit structures consisting of two or more units. Multi-unit structures in El Cajon constituted the largest type of housing provided for its residents—roughly 10 percent more than single-family homes. Although there are fewer multi-unit structures in Ramona than one-unit structures, this may be an indicator for the need of more affordable housing to accommodate residents. A suitable stock of housing will allow for economic vitality to exist in the rural areas and to decrease the potential for crime and community deterioration.

*Age of Structure:* Table D.2 correlates the number of housing units in the city or community to the age of the existing structure based on 1990 Census data. It is clearly evident that in Ramona and its competitive surroundings, the majority of housing units were constructed between 1960 and 1979, and after 1980—with the exception of El Cajon, where more housing was built before 1960 than after 1980. 40 percent of the housing in Ramona was built after 1980, 43.4% between 1960-1979, and 16.6% before 1960; Ramona by far has the highest percentage of relatively new housing in the area. As a result, this illustrates the possible need for housing renovation in the Ramona area to comply with current living standards and to promote the aesthetics of the community.

*Ownership Rates:* Ramona has the second highest percentage of homeowners in comparison to its local competitors, Lakeside, Poway, and El Cajon, as shown in the previous table. Poway has a much higher percentage of homeowners than Ramona does—a difference of 21.3 percent. Although Ramona's percentage of homeowners is higher than Lakeside and El Cajon, the total percentage still remains low in comparison to Poway. This may be another indicator of the need for affordable housing in the area.

*Median Costs:* The previous table above also indicates that Ramona has the lowest rental value for housing units in comparison to the surrounding areas. The small difference in price between Ramona, Lakeside, and El Cajon is most likely a result of an adequate supply of rental units.

*Value:* Ramona had higher housing costs and values compared to the other competitive areas, with the exception of Poway. As seen in Table D.2, Ramona is median housing value of \$166,300 in 1990, is over 31% or \$53,100 lower than the adjacent community of Poway. Not surprisingly, Ramona's median housing value still remains higher than the neighboring areas of Lakeside and El Cajon. Poway, however, consists of over 3,000 housing units valued over \$300,000, which significantly raises the median value for homes in this area. Ultimately, this also indicates that this region is a desirable place to reside, because a large number of individuals were willing to invest and reside in this region.

**Table D.2: Housing Stock Comparison by Jurisdiction, 1990**

	<b>Ramona</b>	<b>Lakeside</b>	<b>Poway</b>	<b>El Cajon</b>
Structure Type (Total Units)	4,405	14,620	14,386	34,453
One Unit	2,734	7,670	11,487	14,381
2 to 4 Units	152	659	124	2,109
5 or more Units	1,217	3,075	1,929	15,670
Mobile Homes/Trailers	284	3,073	769	2,069
Other	18	143	77	224
Age of Structure (Housing Units)	4,405	14,620	14,386	34,453
Pre 1960	732	2,352	1,256	9,172
1960 to 1979	1,911	7,805	8,896	19,093
1980 and after	1,762	4,463	4,234	6,188
Ownership Rates*				
% Home Ownership	46.0%	42.9%	67.3%	32.5%
Median Costs (% of Region Avg.)				
Monthly Rent	\$555	\$607	\$730	\$548
Monthly Mortgage	\$1,106	\$1,068	\$1,460	\$1,046
Value*				
Median Value (% of Region Avg.)	\$166,300	\$160,600	\$219,400	\$157,200
Below \$99,999	149	448	129	1,010
\$100,000 to \$149,999	490	1,897	1,007	3,766
\$150,000 to \$199,999	866	2,631	3,047	3,041
\$200,000 to \$249,999	267	699	1,272	1,297
\$250,000 to \$299,999	112	205	834	853
\$300,000 or higher	49	113	3,062	731

It is imperative to realize that the data illustrated in this section was derived from 1990 Census data due to Census 2000 *detailed* data not being available at this point in time. Although the detailed data was not available, a tabulation of total housing units in the relevant areas was available and is indicated in Table D.3 below.

**TABLE D.3: HOUSING STOCK COMPARISON BY JURISDICTION, 2000**

	<b>Ramona</b>	<b>Lakeside</b>	<b>Poway</b>	<b>El Cajon</b>
Total Housing Units (Census 2000)	5,131 (11,177) (BY REGION)	7,047 (19,155) (BY REGION)	15,714 (15,701) (BY CITY)	35,190 (34,944) (BY CITY)
Occupied Housing Units	10,353	18,337	15,158	33,361
Persons per Household	3.08	3.07	3.23	2.84
Median Household Income	\$58,239	\$46,639	\$68,269	\$35,552
Ownership Rates				
% Home Ownership	59.3%	69.8%	77.7%	40.5%
% Rental Rate	40.7%	30.2%	22.3%	59.5%

*Source: U.S. Census Bureau, Census 2000 Housing Data, and 2000 estimates provided by SANDAG.*

The total number of housing units in Ramona increased by 16.5% from 1990 to 1999, while the average increase for the surrounding cities Poway and El Cajon was 5.7%. This demonstrates that Ramona's housing increased substantially more than the housing in the adjacent cities. Lakeside, however, experienced a decrease in housing by 51.8 %.

In addition to the total housing unit data, ownership rate data for owner-occupied homes was also available from the U.S. Census Bureau for 2000. Ramona’s ownership rate increased by 19.3 percent from 1990, which is a higher increase than the surrounding areas—with the exception of Lakeside experiencing an increase in home ownership of 26.9%.

## HIGHER EDUCATION

After a thorough investigation of data revealing the population’s level of education in Ramona and the surrounding areas, it became evident that the most reliable and consistent data available is compiled in the 1990 U.S. Census. Although this data may seem outdated, the small increase in population over the ten year period, 1990-2000, implies that the education levels held by the population may not have changed significantly. Thus, it is logical that the interpretation of the educational attainment data provided in the Census would still be relevant in terms of developing an understanding of the Ramona area.

Table D.4 below illustrates Ramona’s population in terms of the level of education achieved in comparison to the areas and cities in the surrounding area. The unincorporated area of Ramona has the second highest percentage of citizens 25 years and older, who hold a bachelor’s degree (11.1%), trailing behind the City of Poway, where 22.6% of the population holds a bachelor’s degree. The nearby unincorporated area of Lakeside and the city of El Cajon have the least percentage of citizens 25 years and older who hold a bachelor’s degree; 8.1 percent and 9.4 percent respectively. Ramona, however, has the least percentage of its population who hold a graduate or professional degree (only 3.0%), while the other three areas have a much higher percentage. Considering all of the population who have achieved at least an associate degree or higher, Ramona has one of the largest labor pools of college graduates (23.3%) compared to Lakeside (20.3%) and El Cajon (22.6%). Poway has the most educated population of 43.9%. This data further exemplifies Ramona’s ability to supply a decent labor force, even though the community has the largest percentage of individuals not completing high school (22%).

**TABLE D.4: EDUCATION LEVEL COMPARISON, 1990**

*Citizens Age 25 and Older*

Education Level	Ramona	%	Lakeside	%	Poway	%	El Cajon	%
Total Numbers	7,389	100.0	24,806	100.0	26,792	100.0	54,154	100.0
No Diploma	1,638	22.2	4,442	17.9	2,333	8.7	11,635	21.5
High School Diploma	2,108	28.5	7,854	31.7	5,670	21.1	15,420	28.5
College, No Degree	1,925	26.0	7,480	30.1	7,040	26.3	14,861	27.4
Associate Degree	679	9.2	2,212	8.9	2,534	9.5	4,413	8.1
Bachelor Degree	817	11.1	2,010	8.1	6,054	22.6	5,077	9.4
Graduate/Prof. Degree	222	3.0	808	3.3	3,161	11.8	2,748	5.1

## WATER AND SEWER CAPACITY

Adequate water and sewer capacity are important ingredients for expanding business and residential opportunities. Predictions for water use need to take into account a wide variety of economic, climatic, and demographic factors, such as population, type of housing, and household occupancy. The study team found it difficult to obtain consistent data to compare the water and sewer capacity of Ramona, Lakeside, Poway and El Cajon since each of the water districts that service these communities maintain data in different formats. This was coupled with the challenge of getting each district to release data. Furthermore, some of the communities being examined are serviced by more than one water district (e.g., Lakeside and El Cajon). However, by using data obtained from member water districts, the study team was able to identify sufficient indicators that suggest that Ramona does not have adequate capacity for business or residential expansion. The discussion that follows details the findings on the water and sewer capacity of each community.

The San Diego County Water Authority wholesales imported water to its 23 member agencies, which in turn deliver the water to individual homes and businesses throughout the county. The county's 2.9 million residents typically rely on imported water for 90 percent of their total supply in a typical year. By 2020, water demand within the Water Authority's service area is expected to grow from about 695,000 acre feet to 813,000 acre feet. The four member agencies relevant to this competitive analysis are the Ramona Municipal Water District, the Padre Dam Municipal Water District (serving Lakeside and parts of El Cajon), the Helix Water District (serving the remaining parts of El Cajon), and the City of Poway Public Services Department.

Water is an especially acute concern for Ramona residents and business owners, who are served by the Ramona Municipal Water District, since the majority of Ramona's water (99 percent) must be imported and delivered up hill with expensive electrically powered pumps. An underlying concern for Ramona's water needs is whether the San Vicente Plan has the capacity to provide sewage treatment service for new users.<sup>38</sup> Its current capacity is about 600,000 gallons per day—enough to handle the users that already have sewer connections. But adding commercial and residential users could exceed the existing capacity. Concerns over sewer capacity have necessitated the implementation of a moratorium on additional sewer hookups to serve new commercial and residential development until additional capacity becomes available.

The price of water in Ramona is also high compared to surrounding communities. As shown in Table D.5, connection fees in Ramona for ¾ inch pipe costs \$7,000 compared to the second highest cost of \$5,190 in Poway, followed by a cost of \$2,811 to \$4,485 in the Padre Dam Municipal Water District service area, and no cost for the Helix Water District. Connection fees in Ramona increase to \$11,669 for 1 inch pipe and \$23,331 for 1 ½" pipe.

**Table D.5: Water Capacity and Cost**

	Ramona MWD	Padre Dam MWD	City of Poway	Helix WD
<b>Estimated Water Supply</b>				
Imported	99%	96.4%	98.3%	93%
Reclaimed or Local	1%	3.6%	1.7%	7%
<b>Capacity (million gallons)</b>				
Potable	26	104.8	24.3	24
Reclaimed	0	1.5	2	0
<b>Meter Service Charge</b>				
5/8"	\$15.48	\$18	\$16.80	\$22.45
3/4	\$15.48	\$20	\$16.80	\$22.45
1"	\$30.96	\$27	\$31.50	\$49.35
1 ½"	\$61.92	\$43	\$55.95	\$94.25
2"	\$92.88	\$61	\$85.35	\$148.15
3"	\$170.28	\$111	\$163.65	\$291.80
4"	\$294.12	\$168	\$251.80	\$453.40
6"	--	\$327	\$594.50	\$902.20
8"	--	\$327	\$791	\$902.20
10"	--	\$327	\$1,182.33	--
<b>Connection Fee</b>				
¾	\$7,000	\$2,811 to \$4,485	\$5,190	None
1"	\$11,669		--	None
1 ½"	\$23,331		--	None

<sup>38</sup> Based on anecdotal information gathered during local interviews and focus groups.

## **CONCLUSION**

The presence of a well-educated workforce is among the best advantages that Ramona has compared to the surrounding communities of Lakeside and El Cajon. Ramona's relatively high percentage of residents with a bachelor's degree enables the community to supplement the workforce in higher paying technology jobs in nearby Poway. However, a concern remains among some residents and planners about the migration of high paying jobs away from Ramona to nearby Poway. Ramona also ranks high in other business concerns, such as adequate housing stock and crime rates. One of the few concerns for Ramona is housing availability, although housing costs are somewhat higher than those in Lakeside and El Cajon. Related to housing is the concern about the capacity to provide sewage treatment and water for new users. Overall, Ramona is a desirable place to live and do business. With the proper policies in place, the commercial and industrial base of the community should prosper. Nonetheless, the uncertain availability of future water supplies necessary to serve new development may place additional constraints on future business and residential expansion.



## **APPENDIX E: RAMONA PROPERTY INVENTORY**

The following table is a list of 514 parcels that are included in the Ramona Commercial Core Area as defined by the Claggett Wolfe Associates Strategic Plan. This data was acquired from an assessment of SANGIS data for the Ramona area, as well as, a walking assessment conducted by the Claggett Wolfe Associates project team. The project team requested parcel data from SANGIS for all parcels zoned commercial, commercial recreational, hotel, motel, resort, and Light Industrial (please note that current Land Use maybe residential even though zoned commercial). While analyzing the data submitted by SANGIS the project team found “missing” parcels within the commercial core. For all “missing” parcels the Claggett Wolfe Associates project team identified each parcel based on San Diego County Assessor Maps and derived an associated land use based on the Ramona Community Planning Map dated 07/20/2000. For these parcels no owner information could be identified.

APN	Owners Name	Assessor 1st Digit Zoning Code	Assessor 1st Digit Zoning Description	Assessor Land Use Code	Assessor Land Use Description	Source
28106512	NA	NA	Industrial	NA	NA	CWA
28112113	NA	NA	Industrial	NA	NA	CWA
28112114	NA	NA	Industrial	NA	NA	CWA
28112115	NA	NA	Industrial	NA	NA	CWA
28112116	NA	NA	Industrial	NA	NA	CWA
28112117	NA	NA	Industrial	NA	NA	CWA
28112118	NA	NA	Industrial	NA	NA	CWA
28112119	NA	NA	Industrial	NA	NA	CWA
28112120	NA	NA	Industrial	NA	NA	CWA
28112218	NA	NA	Industrial	NA	NA	CWA
28112221	NA	NA	Industrial	NA	NA	CWA
28112222	NA	NA	Industrial	NA	NA	CWA
28113003	NA	NA	Industrial	NA	NA	CWA
28118105	NA	NA	Industrial	NA	NA	CWA
28118106	NA	NA	Industrial	NA	NA	CWA
28118212	NA	NA	Industrial	NA	NA	CWA
28118213	NA	NA	Industrial	NA	NA	CWA
28118214	NA	NA	Industrial	NA	NA	CWA
28118217	NA	NA	Industrial	NA	NA	CWA

APN	Owners Name	Assessor 1st Digit Zoning Code	Assessor 1st Digit Zoning Description	Assessor Land Use Code	Assessor Land Use Description	Source
28118218	NA	NA	Industrial	NA	NA	CWA
28119009	NA	NA	Commercial and Office	NA	NA	CWA
28119009	NA	NA	Commercial and Office	NA	NA	CWA
28119010	NA	NA	Commercial and Office	NA	NA	CWA
28119011	NA	NA	Commercial and Office	NA	NA	CWA
28119012	NA	NA	Commercial and Office	NA	NA	CWA
28119102	NA	NA	Institutions	NA	NA	CWA
28119103	NA	NA	Institutions	NA	NA	CWA
28119104	NA	NA	Commercial and Office	NA	NA	CWA
28119106	NA	NA	Commercial and Office	NA	NA	CWA
28119107	NA	NA	Commercial and Office	NA	NA	CWA
28123121	NA	NA	Communication Utilities	NA	NA	CWA
28126102	NA	NA	Undeveloped	NA	NA	CWA
28126105	NA	NA	Undeveloped	NA	NA	CWA
28126209	NA	NA	Undeveloped	NA	NA	CWA
28126210	NA	NA	Undeveloped	NA	NA	CWA
28126211	NA	NA	Undeveloped	NA	NA	CWA
28126213	NA	NA	Industrial	NA	NA	CWA
28126301	NA	NA	Commercial and Office	NA	NA	CWA
28126302	NA	NA	Commercial and Office	NA	NA	CWA
28127112	NA	NA	Industrial	NA	NA	CWA
28127201	NA	NA	Commercial and Office	NA	NA	CWA
28127202	NA	NA	Commercial and Office	NA	NA	CWA
28127213	NA	NA	Industrial	NA	NA	CWA
28127214	NA	NA	Commercial and Office	NA	NA	CWA
28127215	NA	NA	Commercial and Office	NA	NA	CWA
28127232	NA	NA	Single Family	NA	NA	CWA
28127233	NA	NA	Single Family	NA	NA	CWA
28131209	NA	NA	Single Family	NA	NA	CWA

APN	Owners Name	Assessor 1st Digit Zoning Code	Assessor 1st Digit Zoning Description	Assessor Land Use Code	Assessor Land Use Description	Land Use	Source
28131301	NA	NA	Single Family	NA	NA		CWA
28135118	NA	NA	Commercial and Office	NA	NA		CWA
28135119	NA	NA	Commercial and Office	NA	NA		CWA
28135120	NA	NA	Commercial and Office	NA	NA		CWA
28135202	NA	NA	Commercial and Office	NA	NA		CWA
28138242	NA	NA	Commercial and Office	NA	NA		CWA
28140205	NA	NA	Commercial and Office	NA	NA		CWA
28140220	NA	NA	Commercial and Office	NA	NA		CWA
28142205	NA	NA	Commercial and Office	NA	NA		CWA
28142206	NA	NA	Commercial and Office	NA	NA		CWA
28142403	NA	NA	Single Family	NA	NA		CWA
28213013	NA	NA	Commercial and Office	NA	NA		CWA
28213014	NA	NA	Spaced Rural	NA	NA		CWA
28213017	NA	NA	Undeveloped	NA	NA		CWA
28213018	NA	NA	Undeveloped	NA	NA		CWA
28213020	NA	NA	Extensive Agriculture	NA	NA		CWA
28213021	NA	NA	Extensive Agriculture	NA	NA		CWA
28213022	NA	NA	Extensive Agriculture	NA	NA		CWA
28213025	NA	NA	Extensive Agriculture	NA	NA		CWA
28214117	NA	NA	Spaced Rural	NA	NA		CWA
28214118	NA	NA	Spaced Rural	NA	NA		CWA
28214126	NA	NA	Commercial and Office	NA	NA		CWA
28214127	NA	NA	Commercial and Office	NA	NA		CWA
28214128	NA	NA	Commercial and Office	NA	NA		CWA
28214130	NA	NA	Commercial and Office	NA	NA		CWA
28214149	NA	NA	Commercial and Office	NA	NA		CWA
28215006	NA	NA	Commercial and Office	NA	NA		CWA
28215025	NA	NA	Commercial and Office	NA	NA		CWA
28219111	NA	NA	Spaced Rural	NA	NA		CWA

APN	Owners Name	Assessor 1st Digit Zoning Code	Assessor 1st Digit Zoning Description	Assessor Land Use Code	Assessor Land Use Description	Land Use	Source
28219112	NA	NA	Spaced Rural	NA	NA		CWA
28219116	NA	NA	Spaced Rural	NA	NA		CWA
28219124	NA	NA	Extensive Agriculture	NA	NA		CWA
28219125	NA	NA	Extensive Agriculture	NA	NA		CWA
28219126	NA	NA	Extensive Agriculture	NA	NA		CWA
28219127	NA	NA	Commercial and Office	NA	NA		CWA
28219128	NA	NA	Commercial and Office	NA	NA		CWA
28219133	NA	NA	Commercial and Office	NA	NA		CWA
28219134	NA	NA	Commercial and Office	NA	NA		CWA
28219135	NA	NA	Commercial and Office	NA	NA		CWA
28219137	NA	NA	Commercial and Office	NA	NA		CWA
28219222	NA	NA	Spaced Rural	NA	NA		CWA
28219225	NA	NA	Spaced Rural	NA	NA		CWA
28219227	NA	NA	Spaced Rural	NA	NA		CWA
28219231	NA	NA	Commercial and Office	NA	NA		CWA
28219232	NA	NA	Commercial and Office	NA	NA		CWA
28219236	NA	NA	Commercial and Office	NA	NA		CWA
28219237	NA	NA	Commercial and Office	NA	NA		CWA
28219238	NA	NA	Commercial and Office	NA	NA		CWA
28219239	NA	NA	Commercial and Office	NA	NA		CWA
28220103	NA	NA	Commercial and Office	NA	NA		CWA
28220104	NA	NA	Commercial and Office	NA	NA		CWA
28220105	NA	NA	Commercial and Office	NA	NA		CWA
28220201	NA	NA	Commercial and Office	NA	NA		CWA
28220204	NA	NA	Commercial and Office	NA	NA		CWA
28220205	NA	NA	Commercial and Office	NA	NA		CWA
28220304	NA	NA	Commercial and Office	NA	NA		CWA
28220510	NA	NA	Single Family	NA	NA		CWA
28221104	NA	NA	Commercial and Office	NA	NA		CWA

APN	Owners Name	Assessor 1st Digit Zoning Code	Assessor 1st Digit Zoning Description	Assessor Land Use Code	Assessor Land Use Description	Land Use	Source
28221201	NA	NA	Commercial and Office	NA	NA		CWA
28221202	NA	NA	Commercial and Office	NA	NA		CWA
28221215	NA	NA	Commercial and Office	NA	NA		CWA
28222101	NA	NA	Commercial and Office	NA	NA		CWA
28222102	NA	NA	Commercial and Office	NA	NA		CWA
28222103	NA	NA	Commercial and Office	NA	NA		CWA
28222105	NA	NA	Commercial and Office	NA	NA		CWA
28222106	NA	NA	Commercial and Office	NA	NA		CWA
28222210	NA	NA	Commercial and Office	NA	NA		CWA
28222302	NA	NA	Commercial and Office	NA	NA		CWA
28222303	NA	NA	Commercial and Office	NA	NA		CWA
28226134	NA	NA	Commercial and Office	NA	NA		CWA
28226275	NA	NA	Commercial and Office	NA	NA		CWA
27847201	MT WOODSON GOLF PARTNERS L L C	9	Special/Misc	82	Golf Course		SANGIS
27847203	MT WOODSON GOLF PARTNERS L L C	9	Special/Misc	82	Golf Course		SANGIS
27847204	MT WOODSON GOLF PARTNERS L L C	9	Special/Misc	82	Golf Course		SANGIS
27847206	MT WOODSON GOLF PARTNERS L L C	9	Special/Misc	82	Golf Course		SANGIS
27847210	MT WOODSON GOLF PARTNERS L L C	9	Special/Misc	82	Golf Course		SANGIS
27847211	MT WOODSON GOLF PARTNERS L L C	9	Special/Misc	82	Golf Course		SANGIS
28012506	RAMONA MINING+MANUFACTURING	7	Industrial (M -Zone)	41	Factory/Ligt Manufacturing		SANGIS
28110018	M S W PARTNERSHIP	7	Industrial (M -Zone)	40	Vacant Industrial		SANGIS
28112109	CHRISTIANSSEN RALPH E+BARBARA M	7	Industrial (M -Zone)	43	Warehouse-Processing/Storage		SANGIS
28112204	GROVES WILLIAM L+MONA L	7	Industrial (M -Zone)	44	Storage-Bulk (Tanks, etc.)		SANGIS
28112205	SUPERIOR READY MIX CONCRETE L P	7	Industrial (M -Zone)	11	Single Family Residence		SANGIS
28112206	SUPERIOR READY MIX CONCRETE L P	7	Industrial (M -Zone)	49	Miscellaneous/Special		SANGIS
28112207	AMERIGAS PROPANE L P	7	Industrial (M -Zone)	44	Storage-Bulk (Tanks, etc.)		SANGIS
28112220	REEDY WILLIAM J JR	7	Industrial (M -Zone)	46	Automotive Garages (Small)		SANGIS
28112221	GARA DEVELOPMENT INC	7	Industrial (M -Zone)	40	Vacant Industrial		SANGIS
28112222	SOUZA JOHN J JR+M CAROLYN	7	Industrial (M -Zone)	40	Vacant Industrial		SANGIS

APN	Owners Name	Assessor 1st Digit Zoning Code	Assessor 1st Digit Zoning Description	Assessor Land Use Code	Assessor Land Use Description	Source
28113014	BUSHEY CHESTLEY+KATHY D, MCGHEE	7	Industrial (M -Zone)	39	Radio Station/Bank/Misc.	SANGIS
28113015	AUERBACH ERNEST+LISA D TRS	7	Industrial (M -Zone)	43	Warehouse-Processing/Storage	SANGIS
28117103	ALLEN GARY B+PAMELA T	4	Multiple Residential (R-4)	11	Single Family Residence	SANGIS
28117104	HABIB JAMAL N	6	Commercial	20	Vacant Commercial	SANGIS
28117305	FINEGOLD FAMILY 1999 TRUST,	4	Multiple Residential (R-4)	15	Multiple 16 to 60 Units -Commercial	SANGIS
28117306	GREAT WESTERN BANK	6	Commercial	39	Radio Station/Bank/Misc.	SANGIS
28117307	AMERICAN STORES PROPERTIES INC	6	Commercial	37	Grocery/Drug Store - Lg. Chain	SANGIS
28117308	AMERICAN FOOD+DRUG INC <LF>	6	Commercial	37	Grocery/Drug Store - Lg. Chain	SANGIS
28117309	AMERICAN STORES PROPERTIES INC	6	Commercial	24	Community Shopping Center	SANGIS
28117310	SIERRA CONCORD INVESTORS	6	Commercial	24	Community Shopping Center	SANGIS
28117311	SIERRA CONCORD INVESTORS	6	Commercial	24	Community Shopping Center	SANGIS
28117312	BANK OF AMERICA NT+SA	6	Commercial	39	Radio Station/Bank/Misc.	SANGIS
28118203	NORTH COUNTY STORAGE CO LTD	7	Industrial (M -Zone)	43	Warehouse-Processing/Storage	SANGIS
28118204	NORTH COUNTY STORAGE CO	7	Industrial (M -Zone)	11	Single Family Residence	SANGIS
28118303	FRICKER INVESTMENT CORP	7	Industrial (M -Zone)	41	Factory/Ligt Manufacturing	SANGIS
28119006	CARNEVALE REVOCABLE TRUST	6	Commercial	35	Restaurant	SANGIS
28119008	CARNEVALE REVOCABLE TRUST	6	Commercial	20	Vacant Commercial	SANGIS
28119013	AUERBACH FAMILY TRUST 1987	6	Commercial	39	Radio Station/Bank/Misc.	SANGIS
28119105	HARTJEN LOUIS A TR, HARTJEN	6	Commercial	11	Single Family Residence	SANGIS
28121005	SCIARRETTA JOSEPH A+CAROLYN C	6	Commercial	11	Single Family Residence	SANGIS
28121006	VENGLER DANIEL W, VENGLER	6	Commercial	11	Single Family Residence	SANGIS
28121007	CHANNON EVALYN G REVOCABLE	6	Commercial	11	Single Family Residence	SANGIS
28121010	DARROUGH ZELDA J	6	Commercial	11	Single Family Residence	SANGIS
28121011	D STREET PARTNERS, D STREET	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28121012	THOMSEN DOUGLAS E+CATHY L	6	Commercial	31	Garage/Parking Lot/ Used Car Lot	SANGIS
28122218	MARKERT JIM+TRUDI	6	Commercial	27	Service Station	SANGIS
28122221	SNIDER THOMAS G+B ELAINE	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28122222	RAMONA MUNICIPAL WATER DISTRICT	0	Unzoned	0	Unzoned	SANGIS
28122230	FAY LEW II	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS

APN	Owners Name	Assessor 1st Digit Zoning Code	Assessor 1st Digit Zoning Description	Assessor Land Use Code	Assessor Land Use Description	Source
28122234	WINGTON FLOYD J+LINDA J	6	Commercial	20	Vacant Commercial	SANGIS
28122236	ABBAS WALID H+WAFFA W	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28122241	HARTJEN INVESTMENT PROPERTIES,	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28122303	HIGHWAY PROPERTIES L P	6	Commercial	27	Service Station	SANGIS
28122306	HIGHWAY PROPERTIES L P	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28122307	HIGHWAY PROPERTIES L P	6	Commercial	25	Neighborhood Shopping Center	SANGIS
28123108	HOME FACILITIES CORP <LF>	6	Commercial	20	Vacant Commercial	SANGIS
28123109	HOME FACILITIES CORP <LF>	6	Commercial	39	Radio Station/Bank/Misc.	SANGIS
28123112	DOUGLAS CLIFFORD TRUST 01-01-97	6	Commercial	35	Restaurant	SANGIS
28123113	DOUGLAS CLIFFORD TRUST 01-01-97	6	Commercial	20	Vacant Commercial	SANGIS
28123114	BURCH ROBERT+VICTORIA LIVING	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28123115	BAKER LENINE	6	Commercial	11	Single Family Residence	SANGIS
28123116	GRASSILLI STEVEN+PATTI J,	6	Commercial	11	Single Family Residence	SANGIS
28123117	HAWORTH JAMES L, HAWORTH BETTY	6	Commercial	11	Single Family Residence	SANGIS
28123119	BOTNER FAMILY TRUST 03-10-92	6	Commercial	20	Vacant Commercial	SANGIS
28123120	BOTNER FAMILY TRUST 03-10-92	6	Commercial	13	Multiple 2 to 4 Units or 2 Houses	SANGIS
28123122	BURCH ROBERT+VICTORIA LIVING	6	Commercial	20	Vacant Commercial	SANGIS
28123123	HAWORTH JAMES L	6	Commercial	20	Vacant Commercial	SANGIS
28123201	EXODUS LLC	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28123202	DOVE B CORTIE+CATHY L	6	Commercial	28	Offices/Medical/Dental/Veterinary	SANGIS
28123206	KEYSER EDWARD A+SHARON	6	Commercial	11	Single Family Residence	SANGIS
28123211	WELSH DAVID C, WELSH CHARLES E+	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28123212	WELSH DAVID C, WELSH CHARLES E+	6	Commercial	27	Service Station	SANGIS
28123213	WELSH DAVID C, WELSH CHARLES E+	6	Commercial	12	Duplex Or Double	SANGIS
28123214	WELSH DAVID C, WELSH CHARLES E+	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28123215	EXODUS L L C	6	Commercial	20	Vacant Commercial	SANGIS
28123216	EXODUS L L C	6	Commercial	20	Vacant Commercial	SANGIS
28123217	EXODUS L L C	6	Commercial	20	Vacant Commercial	SANGIS
28123218	REID KATHERINE E	6	Commercial	11	Single Family Residence	SANGIS

APN	Owners Name	Assessor 1st Digit Zoning Code	Assessor 1st Digit Zoning Description	Assessor Land Use Code	Assessor Land Use Description	Source
28123219	DS LAND TRUST 05-28-99	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28123224	TURNER RALPH E II	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28124013	DONATO DOMENICO+ROSE, DONATO	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28124014	DONATO DOMENICO+ROSE, DONATO	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28124022	WOOD DONALD S TRUST 02-08-99,	6	Commercial	28	Offices/Medical/Dental/Veterinary	SANGIS
28125101	LUNDBLADE BARBARA W TRUST	6	Commercial	20	Vacant Commercial	SANGIS
28125102	LUNDBLADE BARBARA W TRUST	6	Commercial	20	Vacant Commercial	SANGIS
28125105	NGUYEN DONG C+THUYDEE D	6	Commercial	11	Single Family Residence	SANGIS
28125106	BEN-ADERET/GORDON INTER VIVOS	6	Commercial	20	Vacant Commercial	SANGIS
28125107	BEN-ADERET/GORDON INTERVIVOS	6	Commercial	28	Offices/Medical/Dental/Veterinary	SANGIS
28125110	SWIFT EDITH G TRUST 03-07-97	6	Commercial	11	Single Family Residence	SANGIS
28125111	DESENO NICHOLAS B	6	Commercial	20	Vacant Commercial	SANGIS
28125114	BARAJAS RAFAEL+EVANGELINA	6	Commercial	35	Restaurant	SANGIS
28125115	LUNDBLADE BARBARA W TRUST	6	Commercial	20	Vacant Commercial	SANGIS
28125116	BARAJAS RAFAEL+EVANGELINA	6	Commercial	20	Vacant Commercial	SANGIS
28125118	THOMPSON JOHN P TR, MONK E M TR	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28125119	GUSTAFSON WILLIAM A TR	6	Commercial	35	Restaurant	SANGIS
28125120	PACIFIC BELL	0	Unzoned	0	Unzoned	SANGIS
28125121	CASTILLO LYDIA H	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28125204	CHRISTMAN PAULINE R	6	Commercial	12	Duplex Or Double	SANGIS
28126104	PACIFIC BELL (CORP) <LF>	0	Unzoned	0	Unzoned	SANGIS
28126105	PACIFIC BELL (CORP) <LF>	0	Unzoned	0	Unzoned	SANGIS
28126209	WILLIAMS RANDALL B	7	Industrial (M -Zone)	40	Vacant Industrial	SANGIS
28126211	GUNTER RODGER K+DONNA L 1996	7	Industrial (M -Zone)	49	Miscellaneous/Special	SANGIS
28126215	RUOPS DANIELS+WINSLOW NANCY K	6	Commercial	36	Car Wash	SANGIS
28126216	GUNTER RODGER K+DONNA L 1996	6	Commercial	20	Vacant Commercial	SANGIS
28126217	RICHARDSON RONALD	6	Commercial	20	Vacant Commercial	SANGIS
28126303	ATLANTIC RICHFIELD CO	6	Commercial	27	Service Station	SANGIS
28126304	ATLANTIC RICHFIELD CO	6	Commercial	20	Vacant Commercial	SANGIS

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28126305	BUSHEY CHESTLEY L+KATHY D	6	Commercial	35	Restaurant	SANGIS
28126306	BUSHEY CHESTLEY L+KATHY D	6	Commercial	35	Restaurant	SANGIS
28126307	ROSE WILBUR D+MCCULLOUGH-ROSE	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28126308	ROSE WILBUR D+MCCULLOUGH-ROSE	6	Commercial	20	Vacant Commercial	SANGIS
28126323	BUSHEY CHESTLEY L+KATHY D	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28127112	SOUZA JOHN+M CAROLYN	7	Industrial (M -Zone)	40	Vacant Industrial	SANGIS
28127208	DAWSON PERRY A, ALEXANDER JILL	3	Restricted Multiple (R-3)	11	Single Family Residence	SANGIS
28127209	RUOPS DANIEL+WINSLOW NANCY	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28127210	RUOPS DANIEL+WINSLOW NANCY	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28127211	BLAHA OLDRIH+MELITTA	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28127212	BASEL JEFFREY A	7	Industrial (M -Zone)	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28127213	BOOTH JOSEPH E TR	7	Industrial (M -Zone)	40	Vacant Industrial	SANGIS
28127302	R L L W INC	6	Commercial	35	Restaurant	SANGIS
28127303	R L L W INC	6	Commercial	31	Garage/Parking Lot/ Used Car Lot	SANGIS
28127308	WOODWARD RICHARD D TR, WOODWARD	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28127309	WOODWARD RICHARD D TR, WOODWARD	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28127310	WOODWARD RICHARD D TR, WOODWARD	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28127311	WOODWARD RICHARD D TR, WOODWARD	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28127312	WOODWARD RICHARD D TR, WOODWARD	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28127320	MCCUNE FAMILY TRUST 09-08-98	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28127321	MCCUNE FAMILY TRUST 09-08-98	6	Commercial	11	Single Family Residence	SANGIS
28127322	CONWAY ROYCE D	6	Commercial	71	Church	SANGIS
28128104	FISCHER DOUGLAS D, FISCHER	6	Commercial	20	Vacant Commercial	SANGIS
28128105	MELOCHE JERRY A+POLLYANNA	6	Commercial	20	Vacant Commercial	SANGIS
28128106	MCNULTY BONNIE B	6	Commercial	11	Single Family Residence	SANGIS
28128112	ZELLER TRUST 10-07-75	6	Commercial	20	Vacant Commercial	SANGIS
28128113	AMERICAN NATIONAL RED CROSS	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28128117	SHUMATE ROBERT W+ALTHEA J TRS	6	Commercial	14	Multiple 5 to 15 Units - Residential	SANGIS
28128120	CORBETT LINNIE B TRUST 7-15-80	6	Commercial	20	Vacant Commercial	SANGIS

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28128121	CORBETT LINNIE B TRUST 7-15-80	6	Commercial	27	Service Station	SANGIS
28128201	HARRIS JOHN A CHILDRENS TRUST	7	Industrial (M -Zone)	46	Automotive Garages (Small)	SANGIS
28128202	HARRIS JOHN A CHILDRENS TRUST	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28128203	BARTON FRANCEL T TR	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28128215	MUDD THOMAS L	6	Commercial	19	Miscellaneous	SANGIS
28128216	MUDD THOMAS L	6	Commercial	11	Single Family Residence	SANGIS
28129101	CHEVRON U S A INC	6	Commercial	27	Service Station	SANGIS
28129102	ROSEBERRY DALE L+CAROL J	6	Commercial	46	Automotive Garages (Small)	SANGIS
28129103	ROSEBERRY DALE L+CAROL J	6	Commercial	46	Automotive Garages (Small)	SANGIS
28129104	PIKE OSCAR J+WINNIE E, PIKE	6	Commercial	11	Single Family Residence	SANGIS
28129105	DAY ORRIN C JR+CHERYL M	6	Commercial	20	Vacant Commercial	SANGIS
28129106	DAY ORRIN C JR+CHERYL M	6	Commercial	20	Vacant Commercial	SANGIS
28129107	SANCHEZ JESUS S	6	Commercial	11	Single Family Residence	SANGIS
28129108	DAY ORRIN C JR+CHERYL M	6	Commercial	20	Vacant Commercial	SANGIS
28129109	DAY ORRIN C	6	Commercial	20	Vacant Commercial	SANGIS
28129110	LANG JOSEPH+KIM	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28129111	HENRY FAMILY TRUST 06-27-94	6	Commercial	11	Single Family Residence	SANGIS
28129112	SANTA MARIA MASONIC BUILDING	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28129113	CHANNON WAYNE N	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28129114	DAY ORRIN C JR+CHERYL M	6	Commercial	20	Vacant Commercial	SANGIS
28129115	DAY ORRIN C JR+CHERYL M	6	Commercial	20	Vacant Commercial	SANGIS
28129116	SHAMOUN ROCKY	6	Commercial	20	Vacant Commercial	SANGIS
28129117	SHAMOUN ROCKY	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28129118	DRAGO LOUIS E FAMILY 02-12-98	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28129119	CHEVRON U S A INC	6	Commercial	27	Service Station	SANGIS
28129120	CHEVRON U S A INC	6	Commercial	27	Service Station	SANGIS
28130302	BARTON FRANCEL T TR	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28130307	FEIGEL NORMAN E TR	6	Commercial	27	Service Station	SANGIS
28130308	FEIGEL NORMAN E TR	6	Commercial	27	Service Station	SANGIS

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28130309	HERALD BROOKS P, HERALD JASON	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28130319	HICKETHIER DONALD+LESLIE H,	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28130320	ALFONSI FAMILY TRUST 07-28-99	6	Commercial	26	Hotel/Motel	SANGIS
28130321	ALFONSI FAMILY TRUST 07-28-99	6	Commercial	26	Hotel/Motel	SANGIS
28131302	GMBC II, GMBC II	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28131305	HUI SAM YUEN-HON+ROWENA	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28131306	BURGER KELVIN J, BRUMFIELD	6	Commercial	11	Single Family Residence	SANGIS
28131307	KALEMKIARIAN PAUL	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28131325	RAMONA FOOD+CLOTHES CLOSET	6	Commercial	39	Radio Station/Bank/Misc.	SANGIS
28131328	RAMONA TOWN HALL INC	6	Commercial	79	Miscellaneous/Special	SANGIS
28132102	SCHWEIZER FAMILY TRUST 02-26-97	6	Commercial	11	Single Family Residence	SANGIS
28132103	SOUZA JOHN J+M CAROLYN	6	Commercial	11	Single Family Residence	SANGIS
28132104	RAMONA VALLEY MOTEL ASSOCIATES	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28132105	SS+A ENTERPRISES INC	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28132109	CATANZARO AUGUST J, TUCKER	3	Restricted Multiple (R-3)	13	Multiple 2 to 4 Units or 2 Houses	SANGIS
28132110	DILMORE SAMUEL J	6	Commercial	13	Multiple 2 to 4 Units or 2 Houses	SANGIS
28132111	LEVIN JOEL D TR, LEVIN CAROL J	6	Commercial	20	Vacant Commercial	SANGIS
28132112	LEVIN JOEL D TR, LEVIN CAROL J	6	Commercial	20	Vacant Commercial	SANGIS
28132113	LEVIN JOEL D TR, LEVIN CAROL J	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28132114	GILLESPIE ROBERT J+SANDRA P	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28132115	KATHAWA JERRY J+BARBARA L	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28132116	SULKA STEPHEN J+CHRISTINA R	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28132117	CANYON OAKS UNLIMITED INC	7	Industrial (M -Zone)	43	Warehouse-Processing/Storage	SANGIS
28132118	KIRK ALDA G TR	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28132119	KIRK ALDA G TR	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28132120	CAVERSHAM INC	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28132122	RIFFLE FREDRICK E+LYNN R	6	Commercial	13	Multiple 2 to 4 Units or 2 Houses	SANGIS
28132125	CIRCLE K STORES INC	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28132126	BORCHARDT RONALD H TR+BORCHARDT	6	Commercial	31	Garage/Parking Lot/ Used Car Lot	SANGIS

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28133101	POYNTER JUDE E TRUST 09-04-92	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28133112	HAGER DAVID C	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28133113	HAGER DAVID C	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28133114	GRAMMER JAMES R+PHYLLIS V,	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28133115	SALVATORE JAMES P TRUST	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28133116	SALVATORE JAMES P TRUST	7	Industrial (M -Zone)	43	Warehouse-Processing/Storage	SANGIS
28133117	DJEKICH MILIVOJE+JOAN	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28133119	POYNTER JUDE E TRUST 09-04-92	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28133122	D+L ENTERPRISES, D+L	6	Commercial	33	Theater	SANGIS
28133123	POYNTER JUDE E TRUST 09-04-92	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28133201	COLE LEWIS N	6	Commercial	11	Single Family Residence	SANGIS
28133221	RADCLIFFE PETER	6	Commercial	19	Miscellaneous	SANGIS
28134304	SWANSON CARL A TRUST 04-13-95	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28134305	CALVERT RICHARD W+JOAN R	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28134306	NEWELL KIRK D+TRUDIE K	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28134307	MARCO SALES INC	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28134310	ZICK GORDON R+DONNA R TRS	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28134311	ZICK GORDON R+DONNA R TRS	6	Commercial	20	Vacant Commercial	SANGIS
28134312	ZICK GORDON R+DONNA R TRS	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28134313	ZICK GORDON R+DONNA R TRS	3	Restricted Multiple (R-3)	10	Vacant Residential	SANGIS
28134316	RAMONA PIONEER HISTORICAL	3	Restricted Multiple (R-3)	11	Single Family Residence	SANGIS
28134317	PREISS 1998 TRUST	3	Restricted Multiple (R-3)	11	Single Family Residence	SANGIS
28134318	MARCO SALES INC	3	Restricted Multiple (R-3)	10	Vacant Residential	SANGIS
28134319	CALVERT RICHARD W+JOAN R	3	Restricted Multiple (R-3)	11	Single Family Residence	SANGIS
28134320	GARCIA OCTAVIANO+LUPE O	3	Restricted Multiple (R-3)	11	Single Family Residence	SANGIS
28134321	LEVY STANLEY A, LEVY LAWRENCE	3	Restricted Multiple (R-3)	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28134322	CROFT PETER	3	Restricted Multiple (R-3)	10	Vacant Residential	SANGIS
28134323	RAMONA PIONEER HISTORICAL	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28135101	RAMONA IRRIGATION+ELECTRICAL	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS

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28135102	RAMONA IRRIGATION+ELECTRICAL	6	Commercial	20	Vacant Commercial	SANGIS
28135103	NIELSEN MICHAEL P+PENNY R	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28135104	NIELSEN MICHAEL P+PENNY	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28135105	NIELSEN MICHAEL P+PENNY	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28135106	MACLEITH MARY E R TR	6	Commercial	20	Vacant Commercial	SANGIS
28135107	MACLEITH MARY E R TR	6	Commercial	20	Vacant Commercial	SANGIS
28135108	MACLEITH MARY E R TR	6	Commercial	20	Vacant Commercial	SANGIS
28135109	PLUEGER FAMILY TRUST 03-22-94	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28135111	MEADOR JAMES W+DRUSILLA TRS	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28135112	MEADOR JAMES W+DRUSILLA TRS	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28135118	KAPELCZAK EDMUND+YVONNE	6	Commercial	20	Vacant Commercial	SANGIS
28135119	NIELSEN MICHAEL P+PENNY R	6	Commercial	20	Vacant Commercial	SANGIS
28135120	NIELSEN MICHAEL P+PENNY R	6	Commercial	20	Vacant Commercial	SANGIS
28135121	PLUEGER FAMILY TRUST 03-22-94	6	Commercial	20	Vacant Commercial	SANGIS
28135122	BERENS JAMES+CYNTHIA E	6	Commercial	11	Single Family Residence	SANGIS
28135201	CAVINS FAMILY TRUST 10-26-82	6	Commercial	20	Vacant Commercial	SANGIS
28135202	CAVINS FAMILY TRUST 10-26-82	6	Commercial	20	Vacant Commercial	SANGIS
28135204	ORTEGA MARCOS+LIBRADA T	6	Commercial	11	Single Family Residence	SANGIS
28135205	PIERCE MICHAEL J+ARON M,	6	Commercial	11	Single Family Residence	SANGIS
28135206	ELIASSON FAMILY TRUST	6	Commercial	11	Single Family Residence	SANGIS
28135211	HANVEY BROS INC	6	Commercial	20	Vacant Commercial	SANGIS
28135212	HANVEY BROS INC	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28135213	HODGE CHARLES L+DAWNA M	6	Commercial	20	Vacant Commercial	SANGIS
28135215	HODGE CHARLES L+DAWNA M	6	Commercial	20	Vacant Commercial	SANGIS
28135216	BROWN NAOMI M REVOCABLE TRUST	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28135217	RAMONA WOMENS CLUB INC	6	Commercial	81	Meeting Hall, Gym	SANGIS
28135218	RAMONA WOMENS CLUB INC	6	Commercial	20	Vacant Commercial	SANGIS
28135219	HODGE CHARLES L+DAWNA M	6	Commercial	39	Radio Station/Bank/Misc.	SANGIS
28138238	LEFORS LISA A	6	Commercial	11	Single Family Residence	SANGIS

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28138239	GAMBRIOLI GAETANO	6	Commercial	10	Vacant Residential	SANGIS
28140106	SCHULMPBERGER JERRY R+SHARON L	6	Commercial	11	Single Family Residence	SANGIS
28140107	WOOD JAMES O	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28140108	SCHLUMPBERGER JERRY R+SHARON L	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28140109	BISHER TRUCK LINE INC	6	Commercial	20	Vacant Commercial	SANGIS
28140110	BISHER TRUCK LINE INC	7	Industrial (M -Zone)	43	Warehouse-Processing/Storage	SANGIS
28140111	HORRALL ALAN T+YVETTE	6	Commercial	11	Single Family Residence	SANGIS
28140112	HORRALL ALAN T+YVETTE	6	Commercial	10	Vacant Residential	SANGIS
28140113	BISHER TRUCK LINE INC	6	Commercial	20	Vacant Commercial	SANGIS
28140114	SCHULMPBERGER JERRY R+SHARON L	6	Commercial	20	Vacant Commercial	SANGIS
28140116	RAMONA MUNICIPAL WATER DISTRICT	0	Unzoned	0	Unzoned	SANGIS
28140117	RAMONA MUNICIPAL WATER DISTRICT	0	Unzoned	0	Unzoned	SANGIS
28140201	RAMONA VALLEY MOTEL ASSOCIATES	6	Commercial	26	Hotel/Motel	SANGIS
28140213	GAMBRIOLI GAETANO	6	Commercial	12	Duplex Or Double	SANGIS
28140214	GRIFFIN PAUL H+JEANETTE M	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28140217	RAMONA VALLEY MOTEL ASSOCIATES	6	Commercial	26	Hotel/Motel	SANGIS
28140218	SINGER FAMILY TRUST 09-25-90	6	Commercial	31	Garage/Parking Lot/ Used Car Lot	SANGIS
28142201	FAMOUS RAMONA WATER INC	7	Industrial (M -Zone)	11	Single Family Residence	SANGIS
28142204	FAMOUS RAMONA WATER INC	7	Industrial (M -Zone)	41	Factory/Ligt Manufacturing	SANGIS
28142306	JAGGI ALBERT J+MELYNDA 1997	7	Industrial (M -Zone)	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28142402	MACLEITH MARY E R TR	7	Industrial (M -Zone)	43	Warehouse-Processing/Storage	SANGIS
28143108	ANUFROM PATRICIA	6	Commercial	11	Single Family Residence	SANGIS
28143111	CARDENAS JOSE L+M ELISA,	1	Single Family Residential	11	Single Family Residence	SANGIS
28143113	DEGENFELDER FAMILY TRUST	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28143229	TURCO ALBERT J	6	Commercial	35	Restaurant	SANGIS
28143230	KOHORST JOYCE L REVOCABLE TRUST	6	Commercial	35	Restaurant	SANGIS
28144201	RAMONA MUNICIPAL WATER DISTRICT	0	Unzoned	0	Unzoned	SANGIS
28147102	WAGNER THOMAS W	1	Single Family Residential	44	Storage-Bulk (Tanks, etc.)	SANGIS
28148442	741 HIGHWAY 78 LAND TRUST	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS

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28154002	DEGENFELDER FAMILY TRUST	8	Agricultural	41	Factory/Ligt Manufacturing	SANGIS
28154003	SPRANGERS TRUST B 01-17-78	8	Agricultural	10	Vacant Residential	SANGIS
28213040	FARKASH JOHN+HEIDI	6	Commercial	46	Automotive Garages (Small)	SANGIS
28213041	ESTES 1999 TRUST 9-2-99 <LF>	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28213042	HABIB JAMAL N, FEGHALI PIERRE M	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28213045	HABIB JAMAL N	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28213046	HABIB JAMAL N	6	Commercial	20	Vacant Commercial	SANGIS
28213064	TROY C M B S PROPERTY L L C	6	Commercial	25	Neighborhood Shopping Center	SANGIS
28213065	K MART CORP	6	Commercial	35	Restaurant	SANGIS
28213066	THORBURN FAMILY TRUST 08-15-89	6	Commercial	38	Auto Sales/Service Agency	SANGIS
28214131	THOMAS FAMILY TRUST 12-28-89,	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28214132	VIRES ELMER W+PAULA A	6	Commercial	20	Vacant Commercial	SANGIS
28214133	PROGRESSIVE PROPERTIES INC	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28214134	MEREDITH FAMILY REVOCABLE TRUST	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28214148	MEREDITH FAMILY TRUST 09-21-92	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28214155	SINGER FAMILY TRUST 09-25-90,	6	Commercial	20	Vacant Commercial	SANGIS
28214156	SINGER MARIE P	6	Commercial	20	Vacant Commercial	SANGIS
28214157	SINGER FAMILY TRUST 09-25-90,	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28214158	SINGER FAMILY TRUST 09-25-90,	6	Commercial	20	Vacant Commercial	SANGIS
28214159	SINGER MARIE P	6	Commercial	20	Vacant Commercial	SANGIS
28215022	TIERSMA LIVING TRUST 01-04-99	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28215026	ARSHAM FREDERIC J+SANDRA S	6	Commercial	28	Offices/Medical/Dental/Veterinary	SANGIS
28219129	BUSHEY CHESTLEY L+KATHRYN D	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28219130	FAABORG ROBERT A+CHRISTINE A	6	Commercial	27	Service Station	SANGIS
28219131	FAABORG ROBERT A+CHRISTINE A	6	Commercial	20	Vacant Commercial	SANGIS
28219132	GERRATO SEBASTIAN, GREENHAUS	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28219136	LOCKYER LIVING TRUST 03-13-90	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28219230	RAMONA ASSOCIATES	6	Commercial	20	Vacant Commercial	SANGIS
28220101	BORCHARDT RONALD H+ROSEMARY E	6	Commercial	31	Garage/Parking Lot/ Used Car Lot	SANGIS

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28220102	MANN JAMES+RHONDA	6	Commercial	35	Restaurant	SANGIS
28220303	REEDY WILLIAM J JR	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28220304	BORCHARDT RONALD H+ROSEMARY E	6	Commercial	20	Vacant Commercial	SANGIS
28220306	CONKLIN FAMILY TRUST 09-12-97	6	Commercial	46	Automotive Garages (Small)	SANGIS
28220307	SOUZA JOHN J JR+M CAROLYN	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28221101	GOOCH EDMOND A TRUST 09-23-99	6	Commercial	13	Multiple 2 to 4 Units or 2 Houses	SANGIS
28221102	MARTHUR ARCHIE G P F C V F W	6	Commercial	39	Radio Station/Bank/Misc.	SANGIS
28221104	HERNANDEZ ARTHUR B JR, MCNULTY	6	Commercial	20	Vacant Commercial	SANGIS
28221105	OWENS FAMILY TRUST 08-29-91	6	Commercial	11	Single Family Residence	SANGIS
28221106	ELSTON JOHN W+NANCY L	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28221207	SWANEPOEL STEFAN, DARMSTANDLER	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28222205	SEDLACK DEVELOPMENT CO LP	6	Commercial	20	Vacant Commercial	SANGIS
28222206	SEDLACK DEVELOPMENT CO LP	6	Commercial	20	Vacant Commercial	SANGIS
28222207	GVS SYSTEMS INC	6	Commercial	27	Service Station	SANGIS
28222208	GVS SYSTEMS INC	6	Commercial	20	Vacant Commercial	SANGIS
28222209	NORMAN STEPHEN S+DANITA A <PF>	6	Commercial	46	Automotive Garages (Small)	SANGIS
28226134	MABEE JOHN C	6	Commercial	20	Vacant Commercial	SANGIS
28226143	LESSER/MOORE SOUTHCOAST LTD,	6	Commercial	25	Neighborhood Shopping Center	SANGIS
28226148	LESSER/MOORE SOUTHCOAST LTD,	6	Commercial	25	Neighborhood Shopping Center	SANGIS
28226150	STATER BROS MARKETS	6	Commercial	37	Grocery/Drug Store - Lg. Chain	SANGIS
28226155	R K F REALTY CORP	6	Commercial	25	Neighborhood Shopping Center	SANGIS
28226156	FELMUS RUTH K	6	Commercial	20	Vacant Commercial	SANGIS
28226157	FELMUS RUTH K	6	Commercial	20	Vacant Commercial	SANGIS
28226158	LESSER/MOORE SOUTHCOAST INC	6	Commercial	25	Neighborhood Shopping Center	SANGIS
28226159	THRIFTY PAYLESS INC <LF> W E C	6	Commercial	37	Grocery/Drug Store - Lg. Chain	SANGIS
28226214	GMBCIII	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28226215	FOX FAMILY TRUST B 06-06-90	3	Restricted Multiple (R-3)	10	Vacant Residential	SANGIS
28226218	GMBC III, GMBC III	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS
28226234	GMBCIII	6	Commercial	21	1 To 3 Story Misc. Store Bldgs.	SANGIS

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28226235	FRANCHISE REALTY INTERSTATE	6	Commercial	35	Restaurant	SANGIS
28226237	STRAWN FRANK W FAMILY TRUST	6	Commercial	39	Radio Station/Bank/Misc.	SANGIS
28303116	LEAHY SEAN P+NANCY J	1	Single Family Residential	39	Radio Station/Bank/Misc.	SANGIS
28305501	WAGNER THOMAS W, HETTELSATER	1	Single Family Residential	13	Multiple 2 to 4 Units or 2 Houses	SANGIS
28305502	JENNINGS MARK+DEBI TRS	6	Commercial	19	Miscellaneous	SANGIS
28308229	MURPHY FAMILY TRUST 03-15-82	1	Single Family Residential	29	Rest Home/Convalescent Hospital	SANGIS
28509023	CELAYA RICHARD G+LISA D	1	Single Family Residential	11	Single Family Residence	SANGIS
28509024	INDUSTRIAL CUSTOM CARTS+	1	Single Family Residential	10	Vacant Residential	SANGIS
28602106	W H R PROPERTIES INC	6	Commercial	32	Trailer Park	SANGIS
28602108	W H R PROPERTIES INC	6	Commercial	32	Trailer Park	SANGIS
28824001	KILBOURN KENNETH S+SYDNEE L	1	Single Family Residential	10	Vacant Residential	SANGIS
28831003	SAN DIEGO COUNTRY ESTATES ASSN	0	Unzoned	82	Golf Course	SANGIS
28831005	SOUZA JOHN J JR+M CAROLYN	6	Commercial	25	Neighborhood Shopping Center	SANGIS
28832009	SAN DIEGO COUNTRY ESTATES ASSN	0	Unzoned	82	Golf Course	SANGIS
28832009	SAN DIEGO COUNTRY ESTATES ASSN	0	Unzoned	82	Golf Course	SANGIS
28834205	SAN DIEGO COUNTRY ESTATES	1	Single Family Residential	86	Open Space Easements	SANGIS
28847107	CHAPPELL DAVID+M JEANNE	1	Single Family Residential	11	Single Family Residence	SANGIS
28861109	SAN DIEGO COUNTRY ESTATES ASSN	1	Single Family Residential	86	Open Space Easements	SANGIS
28868009	NA	NA	Commercial	NA	NA	CWA
28868010	NA	NA	Commercial	NA	NA	CWA
28868033	NA	NA	Commercial	NA	NA	CWA
28868102	NA	NA	Commercial	NA	NA	CWA
28868103	NA	NA	Commercial	NA	NA	CWA
28868104	NA	NA	Commercial	NA	NA	CWA
28868105	NA	NA	Commercial	NA	NA	CWA
28868112	NA	NA	Commercial	NA	NA	CWA
28868113	NA	NA	Commercial	NA	NA	CWA
28868114	NA	NA	Commercial	NA	NA	CWA
28868115	NA	NA	Commercial	NA	NA	CWA

APN	Owners Name	Assessor 1st Digit Zoning Code	Assessor 1st Digit Zoning Description	Assessor Land Use Code	Assessor Land Use Description	Land Use	Source
28868121	NA	NA	Commercial	NA	NA		CWA
28868122	NA	NA	Commercial	NA	NA		CWA
28868123	NA	NA	Commercial	NA	NA		CWA
28868124	NA	NA	Commercial	NA	NA		CWA
28868131	NA	NA	Commercial	NA	NA		CWA
28868132	NA	NA	Commercial	NA	NA		CWA
28868133	NA	NA	Commercial	NA	NA		CWA
28868134	NA	NA	Commercial	NA	NA		CWA
28868141	NA	NA	Commercial	NA	NA		CWA
28868142	NA	NA	Commercial	NA	NA		CWA
28868143	NA	NA	Commercial	NA	NA		CWA
28868144	NA	NA	Commercial	NA	NA		CWA
28868151	NA	NA	Commercial	NA	NA		CWA
28868152	NA	NA	Commercial	NA	NA		CWA
28868153	NA	NA	Commercial	NA	NA		CWA
28868161	NA	NA	Commercial	NA	NA		CWA
28868162	NA	NA	Commercial	NA	NA		CWA
28868163	NA	NA	Commercial	NA	NA		CWA
28868171	NA	NA	Commercial	NA	NA		CWA
28868172	NA	NA	Commercial	NA	NA		CWA
28868173	NA	NA	Commercial	NA	NA		CWA
28868181	NA	NA	Commercial	NA	NA		CWA
28868182	NA	NA	Commercial	NA	NA		CWA
28868183	NA	NA	Commercial	NA	NA		CWA
28868191	NA	NA	Commercial	NA	NA		CWA
28868192	NA	NA	Commercial	NA	NA		CWA
28868193	NA	NA	Commercial	NA	NA		CWA
32805001	UNITED STATES OF AMERICA INDIAN	0	Unzoned	0	Unzoned		SANGIS
32907002	UNITED STATES OF AMERICA INDIAN	0	Unzoned	0	Unzoned		SANGIS

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33101001	UNITED STATES OF AMERICA INDIAN	0	Unzoned	0	Unzoned	SANGIS
33108008	KETCHER CHARLENE S	1	Single Family Residential	11	Single Family Residence	SANGIS