



**THE SAN DIEGO DEFENSE ECONOMY :
STRONG . RESILIENT .
FUTURE-FOCUSED .**



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About

SDMAC

The San Diego Military Advisory Council (SDMAC) is a not-for-profit 501(c)(6) organization established in 2004 to advocate on behalf of the military, veterans, and their families living in the San Diego region. SDMAC's advocacy efforts include facilitating the partnership among our military, elected officials, civic leaders, and the business community to improve the understanding of the important contributions made by the military.

SUPPORT SDMAC and BECOME A MEMBER
www.sdmac.org

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RADY SCHOOL

The Rady School of Management at the University of California San Diego is the region's premier business school, internationally recognized for the intellectual contributions of its faculty and quality of its academic programs. The Rady School offers a full-time MBA program, a Flex MBA program for working professionals, a Ph.D. program, a Master of Finance program, a Master of Science in Business Analytics program, a Flex Master of Science in Business Analytics program, a Master of Professional Accountancy program, Executive Education, and undergraduate courses. To find out more about the Rady School, visit www.rady.ucsd.edu.

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ABOUT THE MILITARY ECONOMIC IMPACT REPORT



SDMAC's annual Military Economic Impact Report (MEIR) highlights the positive impact of federal Defense budgets, veteran benefits, and community involvement by our local military, veterans, and their families on our local economy. Through the partnership formed at the start of 2020, the 2023 MEIR report is a product of the rigorous work of MBA students at the Rady School of Management. Leveraging insights from the frontier of academic research, the team's data analysts applied tools to calculate the impact of military dollars on the San

Diego region. The team focused on continued transparency in data collection and presentation, using clear methodology again in this year's report. In addition to the data analysis in the 2023 report, the perspectives of both military servicemembers and private sector business leaders are included to measure both the quantitative and qualitative impact of the military upon the San Diego community. A separate document that details the report methodology, and the report itself, are available on the SDMAC website, www.sdmac.org, and the Rady School website, www.rady.ucsd.edu.





SAN DIEGO MILITARY ADVISORY COUNCIL

To our generous sponsors,

On behalf of the San Diego Military Advisory Council (SDMAC) Board of Directors I want to express our sincere gratitude for your invaluable support of our annual Military Economic Impact Report. Your unwavering commitment to our organization and the broader military community in the San Diego region makes this important initiative possible.

The Military Economic Impact Report is a cornerstone of our mission to advocate for the military and defense-related industries in the San Diego region. Your generous contribution allows us to gather essential data, conduct comprehensive analysis, and produce a report that not only highlights the significant economic contributions of our military community but also underscores the critical role it plays in our local economy.

We also want to thank the UC San Diego Rady School of Management for their incredible work on this report. The generous support and engagement by Dean Lisa Ordóñez, Assistant Dean Jon Masciana, and Professor Michael Meyer and his team bring the rigorous analysis to the project that is so important in helping our community understand the numbers.

Your support enables us to continue providing policymakers, community leaders, and the public with accurate and up-to-date information that informs decision making and strengthens our region's ties to the military. As a result, we are better equipped to advocate for the needs and interests of our service members, veterans, and defense-related businesses.

Once again, thank you for your generous support of SDMAC and our annual Military Economic Impact Report. We look forward to continuing our collaboration and achieving even greater successes together in the future.

With warmest regards,

Mark Balmert
President and CEO
San Diego Military Advisory Council

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Executive Summary



In our 2022 Military Economic Impact Report we highlighted how local Defense activities foster resiliency within the San Diego economy. Defense spending provided stability for our region in that volatile and uncertain period, while the economic recovery from the pandemic battled with inflationary pressures damping down that recovery.

This stabilizing effect comes in large part because defense-related spending tends to be programmatic, intended to build and maintain over the long term the force required to deter aggression and counter foreseeable threats. Two major elements compose this baseline: payroll and contracting, and in times of crisis, either may surge to meet the challenge. Indeed, we identified the impact of this in previous reports, with outsized increases in contract spending, to include additional medical equipment, services, and consumables, throughout the pandemic.

More than 111,000 active-duty service men and women call San Diego home; they work alongside 7,000 military reservists, and 26,000 civilians directly employed in federal defense jobs. Payroll to support these employees rose by 4.7% in FY23, to \$13.5 billion.

In contracting, we see a shift in activity as the emergency procurements of 2020 to 2022 expire, and spending soldiers on with more normal, programmatic investment. For FY23, direct contract spend was \$19.0 billion, funding nearly 206,000 civilian jobs. This represents a slight decline of -1.5% from FY22, but an overall increase of 17.6% from pre-pandemic FY19 levels.

Defense funds flow through the San Diego economy via many different channels: pay and benefits for

Exhibit 1. Defense Spending and Jobs in San Diego Steady in FY 2023

	DIRECT SPENDING	JOBS	GROSS REGIONAL PRODUCT (GRP)
FY 2023 (%Δ from FY22)	\$36.1 Billion (+0.4%)	354,439 (-0.5%)	\$56.4 Billion (+0.4%)
% of SD Economy	N/A	22.9%	23.6%

military personnel and federal employees along with defense contracts for more than 1,700 local businesses, also retirement and veteran benefits, government purchase cards, and a significant multiplier effect as all these people and companies generate additional economic activity living, shopping, and doing business within San Diego. The net effect is total defense contribution to our Gross Regional Product (GRP) of \$56.4 billion, a 0.4% increase from FY22 that is responsible for more than 354,000 jobs. With San Diego's GRP growing by 4% in current dollars through 2023, the fraction that defense spending contributes to total GRP dips slightly to 23.6%.

As we quantify and report on the current economy, our 2023 report also takes up a view to the future,



highlighting unique aspects of San Diego that set us up for long-term growth, supporting both established industries and technologies at the early edge of their potential.

One of these areas is the Defense Innovation Economy, which is a spotlight in this year's report. Populating a spectrum of activities from research at the leading edge of scientific understanding to ingenious applications of existing technologies,

these enterprises are the seeds of investment that grow into the mainstream of future defense-related spending and yield spinoff technologies to fuel our non-military regional economy. Individual innovation initiatives tend to live at a scale that is easily obscured by normal operations and infrastructure funding, so over the next few reports, we will illuminate the landscape of defense innovation in our region and how our region can maximize the long-term value this sector drives.

Strong, resilient, and future-focused; the Defense economy is vital to our local economy.

FROM OUR MAYOR TODD GLORIA



San Diego is proud of our history and the sustained strength of the partnership we enjoy with the United States military. Not only does the military and defense sector bring tens of billions of dollars into our region's economy, but being home to the largest installation of military personnel in the nation means our communities are bolstered by people who dedicated themselves to service to our nation. We will always be honored and grateful to be a military town.

Military Spending & Job Creation

MILITARY SPENDING



San Diego's economy historically flourishes thanks to several key sectors including tech, travel, tourism, and defense. As our economy recovers from the shock of the pandemic, individual sectors and businesses have experienced uncertainty in demand, constraints in supply, and fluctuating pressures of growth and inflation. Defense spending, in contrast, tends to change more predictably due to the military's large investment in personnel and infrastructure, and its duty to maintain a constancy of service to the nation.

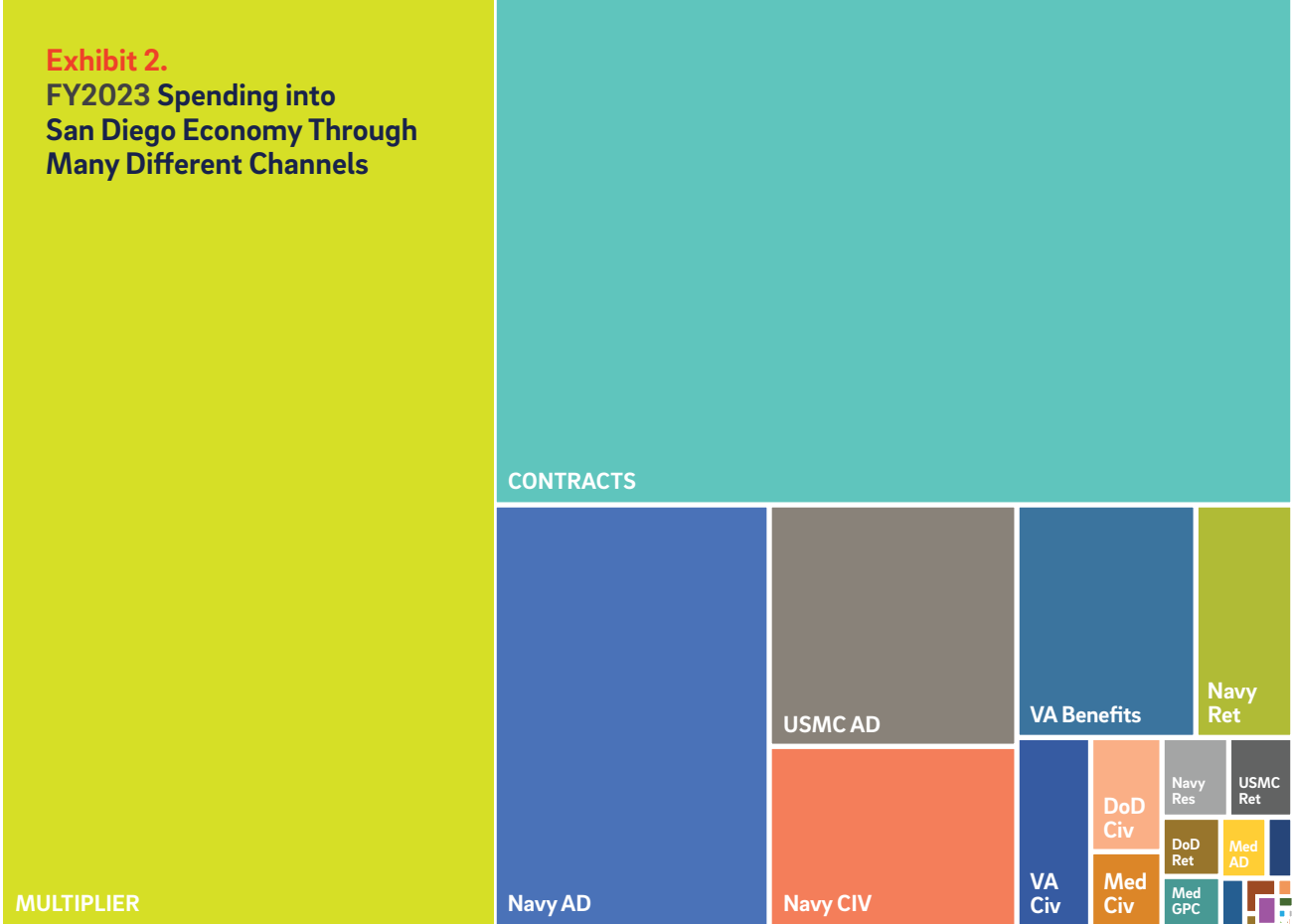
The diverse components of FY 2023 defense spending in our region help strengthen other economic sectors, through small business targeted contract awards,

spending by active duty and retired military families, and direct purchases of products through government charge cards. Employee compensation includes the direct wages and benefits provided to active-duty military personnel, federal civilian employees, and military reservists in the region across the U.S. Navy (USN), U.S. Marine Corps (USMC), U.S. Coast Guard (USCG), and other DoD organizations. Military branches distribute retirement funds to previous military employees across the entire San Diego County. The Veterans Affairs (VA) office distributes key resources to San Diego veterans, including education benefits and health care. Exhibit 2 depicts the multiple different sources of spending and the relative size of different groupings of funding within each branch's contribution. Another major contribution to the local economy is the estimated \$19.0 billion in defense contracting dollars across more than 1,700 different companies in San Diego County during FY 2023. Exhibit 3 depicts the companies in receipt of the greatest percentages of these dollars and Exhibit 4 shows what types of programs these defense contracting dollars are funding in the area.





Exhibit 2.
FY2023 Spending into San Diego Economy Through Many Different Channels



- | | | | |
|----------------------|----------------------|----------------------|---------------------|
| ● Navy Active Duty | ● USMC Active Duty | ● USGC Active Duty | ● Med Active Duty |
| ● Navy Civilian | ● USMC Civilian | ● USGC Civilian | ● Med Civilian |
| ● Navy Reserves | ● USMC Reserves | ● USGC Reserves | ● Med Purchase Card |
| ● Navy Retired | ● USMC Retired | ● USGC Retired | ● VA Civilian |
| ● Navy Purchase Card | ● USMC Purchase Card | ● USGC Purchase Card | ● VA Purchase Card |

Exhibit 3.
Funds Obligated in San Diego by Company

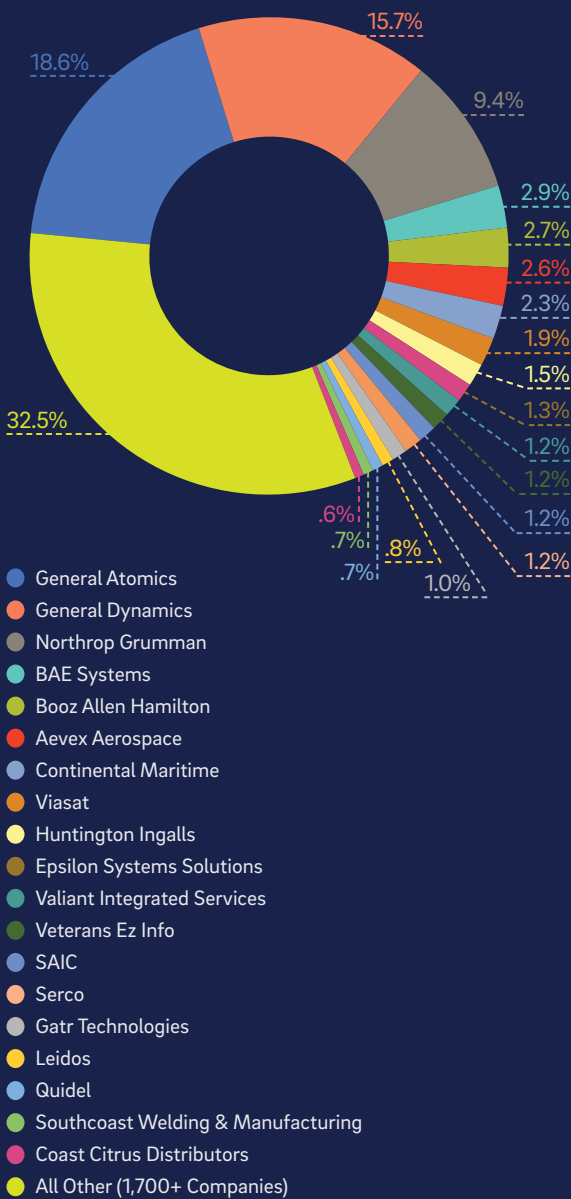
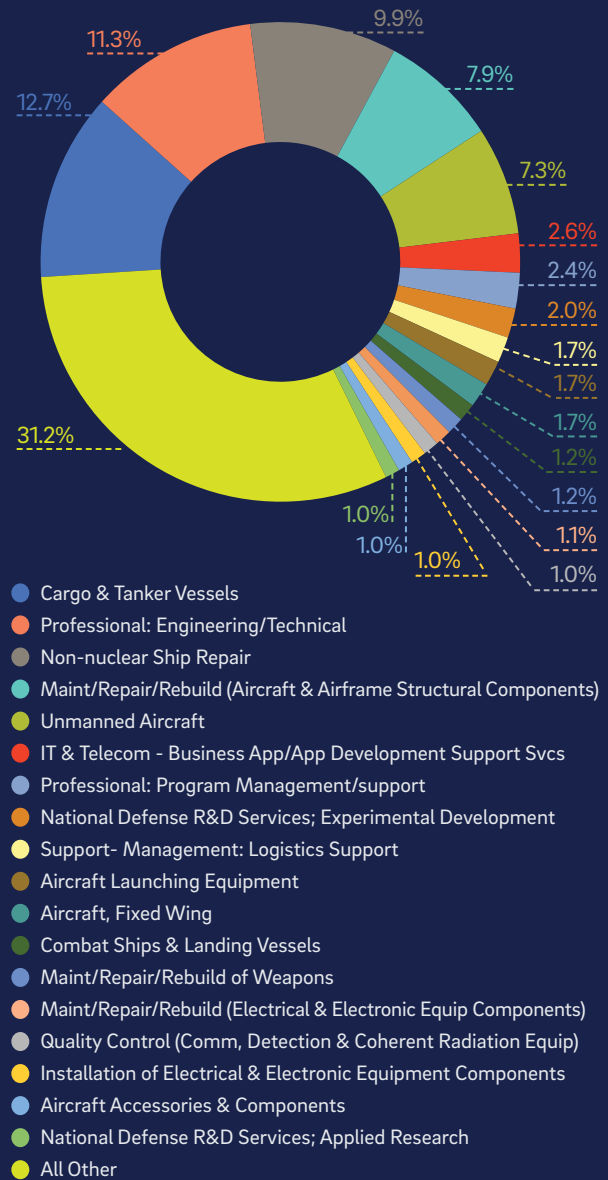


Exhibit 4.
Funds Obligated in San Diego by Program Type



In addition to direct spending, defense spending in the San Diego region also has indirect spillover effects on the gross regional product (GRP) and job creation. Defense spending supports development, which can then be leveraged for alternative revenue, creating a multiplier effect. A first-of-its-kind study of local fiscal multipliers found that \$1 of defense spending contributes up to \$1.56 to GRP and every \$100,000 creates 1.08 jobs per year (FN1). Research also indicates the impact of defense spending is even greater during economic downturns, suggesting a conservative estimate with the application of the Auerbach study results (FN2). As a result of the multiplier effect, the total economic impact of the military in San Diego in 2023 is \$56.4 billion (Exhibit 5). Because of the rise of inflation through 2023, and the delay inherent in measurements of GRP, we compare the defense contribution to San Diego's GRP to a credible estimate of 4% growth in current-year dollars, which shows that the defense contribution shrinks slightly to 23.6% of total GRP (FN3), but remains above its pre-pandemic level of 22.3% (FY 2019). Throughout the report, the indirect job impact and GRP multiplier are applied to determine full economic impact.

Exhibit 5. \$56.4 Billion Impact to San Diego GRP

(\$ in millions)	FY2019	FY2020	FY2021	FY2022	FY2023	%Δ OVER FY22
Employee Compensation	\$11,929	\$12,341	\$13,094	\$12,852	\$13,452	4.7%
Retirement & VA Benefits	\$3,577	\$3,688	\$3,568	\$3,507	\$3,482	-0.7%
Contracts & Procurement	\$16,194	\$17,474	\$18,594	\$19,338	\$19,050	-1.5%
Government Purchase Cards	\$65	\$67	\$85	\$267	\$166	-37.8%
TOTAL DIRECT	\$31,765	\$33,570	\$35,341	\$35,964	\$36,092	0.4%
Multiplier Impact	\$17,789	\$18,799	\$19,862	\$20,211	\$20,284	0.4%
GRP IMPACT	\$49,554	\$52,369	\$55,203	\$56,176	\$56,375	0.4%

JOB CREATION

The military, through the DoD, DHS, and the VA, directly employed 148,704 San Diego residents in FY 2023. Approximately 75% of those are active duty (AD) military personnel, 20% civilians (CIV), and 5% reserve military personnel (Exhibit 6). In addition to direct employment, the \$19.0 billion in government contract and procurement dollars generate approximately 205,735 more jobs in San Diego, given estimates that \$100,000 creates 1.08 jobs per year (FN1). Together the total direct and indirect employment make up 22.9% of the current labor force in San Diego (FN4).

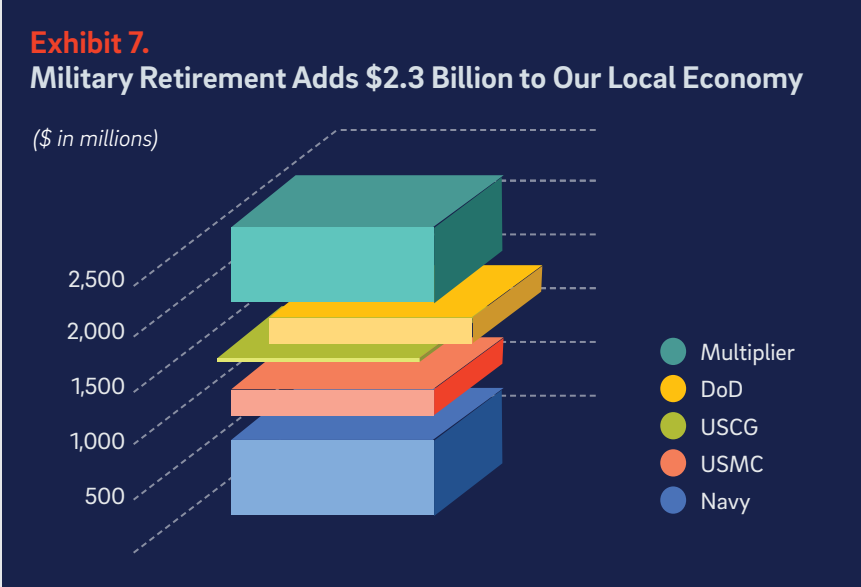
Exhibit 6. 354k Jobs Supported in San Diego

	FY2019	FY2020	FY2021	FY2022	FY2023
USN (AD)	51,850	57,937	59,071	63,747	59,670
USMC (AD)	46,189	48,240	46,680	46,063	46,453
USCG (AD)	927	927	916	916	823
Medical (AD)	5,391	5,513	4,806	4,439	4,622
CIV	28,498	30,430	29,699	29,290	26,194
Reserve	5,352	5,831	2,950	2,745	7,181
VA	4,175	4,193	4,177	4,142	3,761
TOTAL DIRECT	142,382	153,071	148,299	151,342	148,704
Indirect (Result of DoD contracts)	175,617	189,426	200,813	208,858	205,735
TOTAL JOBS	317,999	342,497	349,112	360,200	354,439



RETIREES

San Diego remains home to many long after their orders are complete. FY 2023 sees 41,038 retired military personnel deciding to stay for the long term (FN5). The net effect of these men and women choosing to make America’s Finest City their long-term home is a bolstering \$1.5 billion dollar impact on San Diego’s economy from retirement dollars alone (Exhibit 7).



SPOTLIGHT

SAN DIEGO'S INNOVATION ECONOMY

San Diego is home to a vibrant and growing innovation economy. With its strategic location, world-class research institutions, and proximity to major military installations, San Diego has become a hotbed for pioneering advancements in defense technology. It is no surprise that several mid-size dual-use companies such as Qualcomm, Viasat, Kratos, General Atomics, and Cubic originated in San Diego. Whether it is incorporating commercial technology capabilities or leveraging technology transfer, San Diego brings a history of successful use cases in alignment with priorities emphasized in FY 2024's National Defense Authorization Act. As the need for DoD innovation grows, it is clear that San Diego is primed to be the city to bring forth those innovative solutions.

As the city with the third largest military presence, San Diego offers several advantages for both established companies and start-ups. The first is the proximity to dozens of military installations. Whether companies are developing solutions or seeking out problems to solve, San Diego's unique location offers access to resources not found elsewhere. One example is the Technology Transfer Program (T2) through the Navy Information Warfare Center Pacific (NIWC PAC) (FN6, FN7). The T2 program allows for the intentional sharing of knowledge, expertise, facilities, equipment, and other resources that benefit the DoD and/or non-DoD entity. Cooperative Research and Development Agreements (CRADA) have enabled efforts in autonomous vehicles, microgrids, and 5G. In a virtuous cycle of development, these agreements have led to innovations supporting NIWC PAC technologies as well.

There is no short supply of local talent. The proximity of top-tier academic institutions, such as the University of California San Diego (UCSD), the University of San Diego, San Diego State University, and the Scripps Institution of Oceanography creates a funnel for talented individuals. These institutions are home to world-class research centers and programs focused on defense-related technologies, including cybersecurity, unmanned systems, and materials science. The Jacobs School of Engineering,

for example, is ranked top 5 in the U.S. and top 9 in the world. These institutions not only provide a funnel of talent but also serve as incubators. Within UCSD is the Innovating for National Security Program (i4NS) where students partner with leaders from the Department of Defense to develop innovative solutions to their most pressing national security problems (FN8). Through student teams, the DoD is provided an avenue to connect with problem-solvers from academia, the private sector, and other non-traditional DoD partners.



San Diego's prime location also facilitates unique partnerships not found elsewhere. The Coast Guard Blue Technology Center of Expertise

(BTCOE), located on the Scripps Institute of Oceanography campus, educates and connects industry, academia, and government partners with the Coast Guard (FN9). Through its partnership with Scripps, BTCOE integrates innovative tools and capabilities to support operational mission needs. A notable collaboration is the partnership between Project Recover and researchers at the Scripps Institution of Oceanography. Their work combines historical data with advanced technologies like scanning sonars, high-definition and thermal imaging, underwater robotics, and unmanned aerial systems to optimize underwater search areas. The information is then shared with the Defense POW/MIA Accounting Agency (DPAA) for identification and repatriation purposes. In August 2021, Project Recover announced its first recovery and identification of a U.S. Air Force pilot from offshore Vietnam, highlighting the significance of this partnership (FN10).

Whether it is our location, local talent, or the combination of it all, San Diego's innovation economy brings together the best to support both the present and the past.



United States Navy

San Diego Harbor, designated a National Strategic Port by the Department of Defense because of its location, transportation hubs, and cargo handling capacity, is vital for our Nation's military readiness. San Diego is the homeport for nearly 70 of the Navy's ships (Exhibit 8), including Aircraft Carriers (CVN), Amphibious Ships (LHA, LHD, LPD, and LSD), Cruisers (CG), Destroyers (DDG and DDG-1000), Littoral Combat Ships (LCS), Mine Countermeasure Ships (MCM), and Fast Attack Submarines (SSN). Additionally, several classes of ships owned by Military Sealift Command and manned by Civilian Mariners are homeported in San Diego.

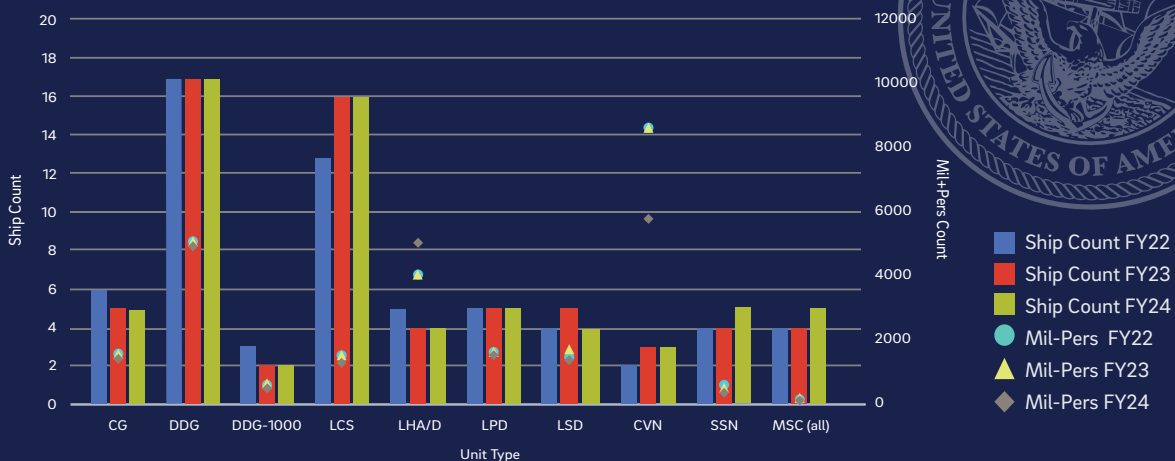
San Diego is also home for one of every six Sailors in the Navy and the home base for numerous operational

and administrative commands, including Naval Special Warfare Command (oversight and training of SEALs), the Navy's Third Fleet (operational control of all Navy activities in the Eastern Pacific Ocean), Naval Surface Force (responsible for manning, training, and equipping all surface ships), Naval Air Forces (responsible for manning, training, and equipping all aircraft and aircraft carriers in the Navy), Navy Region Southwest (oversight of Base Operating Shore Support for 10 Naval Installations across six states), Naval Information Warfare Systems Command (headquarters for the development and production of all Naval command and control systems), Naval Medical Forces Pacific (oversight of Navy Medicine's Western U.S. and Pacific operational medical capability within hospitals and Navy Medicine's medical research and development laboratories), and Naval Surface and Mine Warfare Development Command (training and doctrine headquarters). San Diego is also the operational home to Carrier Strike Group headquarters and Expeditionary Strike Group, each led by an Admiral.

The Navy organizes activities under operational or administrative commands, and locates these commands at several Navy Bases in our region, with the bases under the oversight of a Navy Regional Commander.

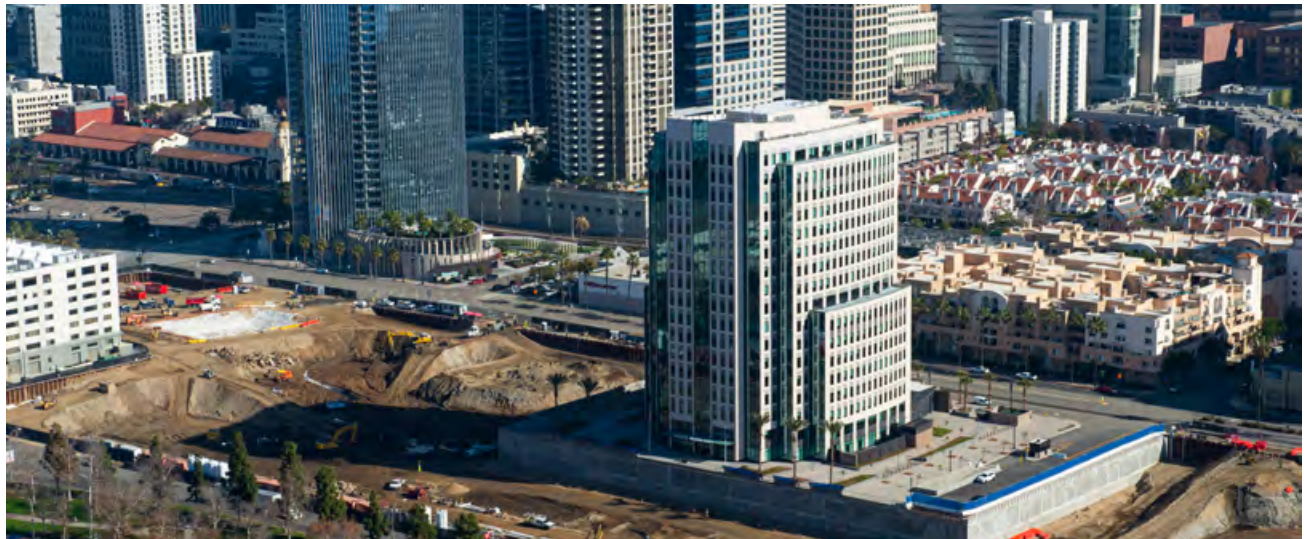


Exhibit 8.
San Diego Grows to Homeport 68 Ships



NAVY REGION SOUTHWEST

Navy Region Southwest (NRSW) headquarters (HQ) is located in downtown San Diego across from the Broadway Pier and is responsible for the oversight of 10 Navy shore installations and various special areas within the six southwest states. The installations under the NRSW Area of Responsibility (AOR) include Naval Base San Diego (NBSD); Naval Base Point Loma (NBPL); Naval Base Coronado (NBC) (Which is comprised of Naval Air Station North Island (NASNI) and Naval Amphibious Base (NAB); Naval Air Facility El Centro (NAFEC); Naval Air Station Lemoore (NASL); Naval Air Weapons Station China Lake (NAWSCL); Naval Base Ventura County (NBVC); Naval Air Station, Fallon (NASF), Naval Support Activity Monterey (NSAM) and Naval Weapons Station Seal Beach (NWSSB) (including detachments at Fallbrook and Corona).



NRSW is the naval shore installation management headquarters, and provides base operating support (BOS) for the fleet and family throughout the region. NRSW continuously seeks innovation efforts, new technologies, and business practices to optimize service costs while continuing to meet the Fleet's demand. Services include providing administrative and operational force tenants with family services, housing, bachelor quarters, medical, security, port services, air services, supply, maintenance, logistics, and environmental support. These services are provided for hundreds of tenant commands that occupy the installations and for thousands of active-duty, reserve and retired military members and their families. Additionally, NRSW ensures environmental compliance actions with local, state and federal regulatory agencies, and provides

oversight for Department of the Navy response to civil emergencies.

NAVAL BASE CORONADO

Supporting complex operations, Naval Base Coronado (NBC) oversees a consortium of eight Navy installations: Naval Air Station North Island, Coronado (NASNI); Naval Amphibious Base, Coronado (NAB); Naval Outlying Landing Field, Imperial Beach (NOLF IB); Naval Auxiliary Landing Field, San Clemente Island (NALF SCI); Silver Strand Training Complex-South, Coronado (SSTC-South), formerly known as the Naval Radio Receiving Facility; Camp Michael Monsoor Mountain Warfare Training Center, La Posta; Camp Morena, La Posta and the Remote Training Site, Warner Springs (RTSWS).

Naval Base Coronado provides a shore-based platform for helicopters, aircraft carriers, SEAL Teams, and other ashore and afloat commands for access to a comprehensive quantity of ground, sea, air, and undersea operational and training space. NBC accommodates the requirements of 16 helicopter squadrons, 2 fixed-wing squadrons, three aircraft carriers, four SEAL Teams, Navy Expeditionary Combat Command squadrons, and other air, surface, and subsurface commands.

NAVAL BASE SAN DIEGO

Homeport to the Pacific Fleet Surface Navy with 56 U.S. Navy ships and two auxiliary vessels, Naval Base San Diego is also home to more than 200 tenant commands, each having specific and specialized fleet support purposes. The base is comprised of over 1,600 land acres and 326



acres of water along the San Diego Bay and is divided into the wet-side, dry-side, and the Fleet and Family Complex. Other areas of responsibility include Commander, Navy Region Southwest and Naval Facilities Engineering Command Southwest headquarters, Naval Medical Center San Diego, and Admiral Baker Golf Course. The base is a workplace for approximately 26,000 military, government civilian, and contract personnel. Additionally, the base has rooms to house more than 4,000 men and women in modern apartment-like barracks.

NAVAL BASE POINT LOMA

Located in the Point Loma neighborhood of San Diego, Naval Base Point Loma consists of seven facilities: Submarine Base, Naval Mine and Anti-Submarine Warfare Command (previously Fleet Anti-Submarine Warfare Command), Fleet Combat Training Center Pacific, Naval Information Warfare Systems Command (NAVWAR), Naval Information Warfare Center (NIWC) Pacific, the Fleet Intelligence Command Pacific and Naval Consolidated Brig, Miramar. These close-knit commands form a diverse and highly technical hub of naval activity. The on-base population is around 22,000 Navy and civilian personnel.

NAVAL INFORMATION WARFARE SYSTEMS COMMAND

Naval Information Warfare Systems Command (NAVWAR) is one of five major Department of Navy acquisition commands. While other Navy acquisition commands, like Naval Air Systems Command (NAVAIR) and Naval Sea Systems Command (NAVSEA), focus on specific platforms, NAVWAR

focuses on capable and secure communications and networks that span platforms and facilities. NAVWAR provides research and development, systems engineering, testing and evaluation, technical, in-service and support services to its three affiliated acquisition program executive offices (PEOs) during all phases of a program's lifecycle. The PEO for Command, Control, Communications, Computers, and Intelligence (PEO C4I), headquartered at NAVWAR's Old Town Campus in San Diego, includes eleven program offices responsible for acquiring, fielding, and supporting C4I systems across Navy, joint, and coalition platforms. The PEO for Digital and Enterprise Services (PEO Digital), headquartered in the Washington, DC area, delivers modern, secure, and effective Information Technology and business systems and services. PEO for Manpower, Logistics and Business (PEO MLB), headquartered in the Washington, DC area, delivers the tools and business systems that enable the daily operations of the Navy in staffing, training, organizing, and equipping Navy and Marine Corps forces around the globe.

NAVWAR consists of bicoastal reporting Naval Information Warfare Centers (NIWCs), which collectively account for more than 11,000 civilian, active duty and reserve professionals located around the world. NIWC Atlantic is located in Charleston, SC, and NIWC Pacific is located in San Diego, and



includes facilities in Japan, Guam, and Hawaii. NIWC Pacific conducts research, development, prototyping, engineering, test and evaluation, installation, and sustainment of integrated information warfare



capabilities and services across all warfighting domains with emphasis on Basic and Applied Research and Tactical Systems Afloat and Ashore to drive innovation and warfighter information advantage.

NAVAL SPECIAL WARFARE COMMAND

Located in Coronado at the Special Warfare Coastal Campus' Silver Strand Training Complex, Naval Special Warfare (NSW) Command leads the Navy's maritime special operations force and is the Navy component of the U.S. Special Operations Command, headquartered in Tampa, Florida.

NSW is the premier maritime full-spectrum special operations force uniquely positioned to defend U.S. national interests in the maritime domain. NSW specializes in a broad range of tactical areas, including unconventional warfare, direct action, counterterrorism, special reconnaissance, and personnel recovery. NSW is organized primarily around eight Navy SEAL teams, three Special Boat Teams, and various supporting commands, totaling approximately 10,000 personnel. Units can operate independently, as part of Navy carrier battle groups and amphibious ready groups, or integrated with other US special operations forces. By utilizing the United States Navy's ships, submarines, and overseas facilities, NSW forces can be deployed rapidly around the world.

NAVAL MEDICAL FORCES PACIFIC

Navy Medicine has an extensive presence in San Diego headed up by its regional command, Naval Medical Forces Pacific (NMFP), located on Naval Base San Diego. In a collaborative relationship with the Defense Health Agency (DHA) which oversees the delivery of health care in military treatment facilities (MTF), NMFP

provides command and control of all subordinate Navy Medicine Readiness Training Commands (NMRTC), Readiness Training Units (NMRTU), and assigned operational platforms in the Western U.S. and Pacific regions. Additionally, NMFP oversees eight Navy Medicine Research and Development Commands around the globe, including the Naval Health Research Center in Point Loma.

In the San Diego Region, NMFP oversees the Naval Medical Center San Diego (NMCS) and Naval Hospital Camp Pendleton (NHCP), along with their 24-branch medical and 11 dental clinics that, when coupled with DoD's TRICARE health insurance program, are responsible for 357,000 eligible beneficiaries locally. Military medicine employs over 7,000 in San Diego, including nearly 5,000 active duty servicemembers (FN11).

Navy Medicine conducts extensive research and development activities in San Diego at NHRC. NHRC's team is a mix of active-duty service members, federal civil service employees, and contractors and includes researchers and scientists whose expertise ranges across physiology, microbiology, biomedical engineering, psychology, epidemiology, and software engineering. NHRC science conducted in both field and laboratory settings spans the spectrum from physical readiness to joint medical planning to wounded warrior recovery and behavioral health needs. The focus is on research that is operationally relevant, driven by fleet requirements, and essential to the health, readiness, and well-being of our nation's military members and their families. NHRC's core research divisions include Operational Readiness and Health, Military Population Health, and Operational Infectious Diseases.



SPOTLIGHT

NAVY PRIORITIES ARE IN SAN DIEGO

DEFENSE INDUSTRIAL BASE EXPANSION

Drawing on our long-standing foothold in the ship repair industry, San Diego stands to benefit from the Navy's demand for increased fleet capacity and an expanded industrial base. DoD and defense community initiatives include: Industrial Base Analysis and Sustainment Program (IBAS), Advancing San Diego initiative, Shipbuilding Regional Industrialization Pilot (SHIP) program, and San Diego's increasing role in the expanding Submarine Industrial Base.



The IBAS program is an element of the DoD tasked to support the monitoring and expansion of the industrial base, address urgent operational needs, and address supply chain vulnerabilities. To that end, the IBAS will nationally contribute \$850M to workforce development. This is a critical element of strategic sourcing of components and subcomponents of America's fighting fleet. As the top fleet concentration and Naval ship repair region in the eastern Pacific, San Diego's human capacity must grow. Taylor Dunn of the San Diego Economic Development Council (EDC), stated that the primary talent acquisition requirements to support the shipbuilding industrial base were in the electrical, fabrication and metalwork, machinist, and pipefitting fields.

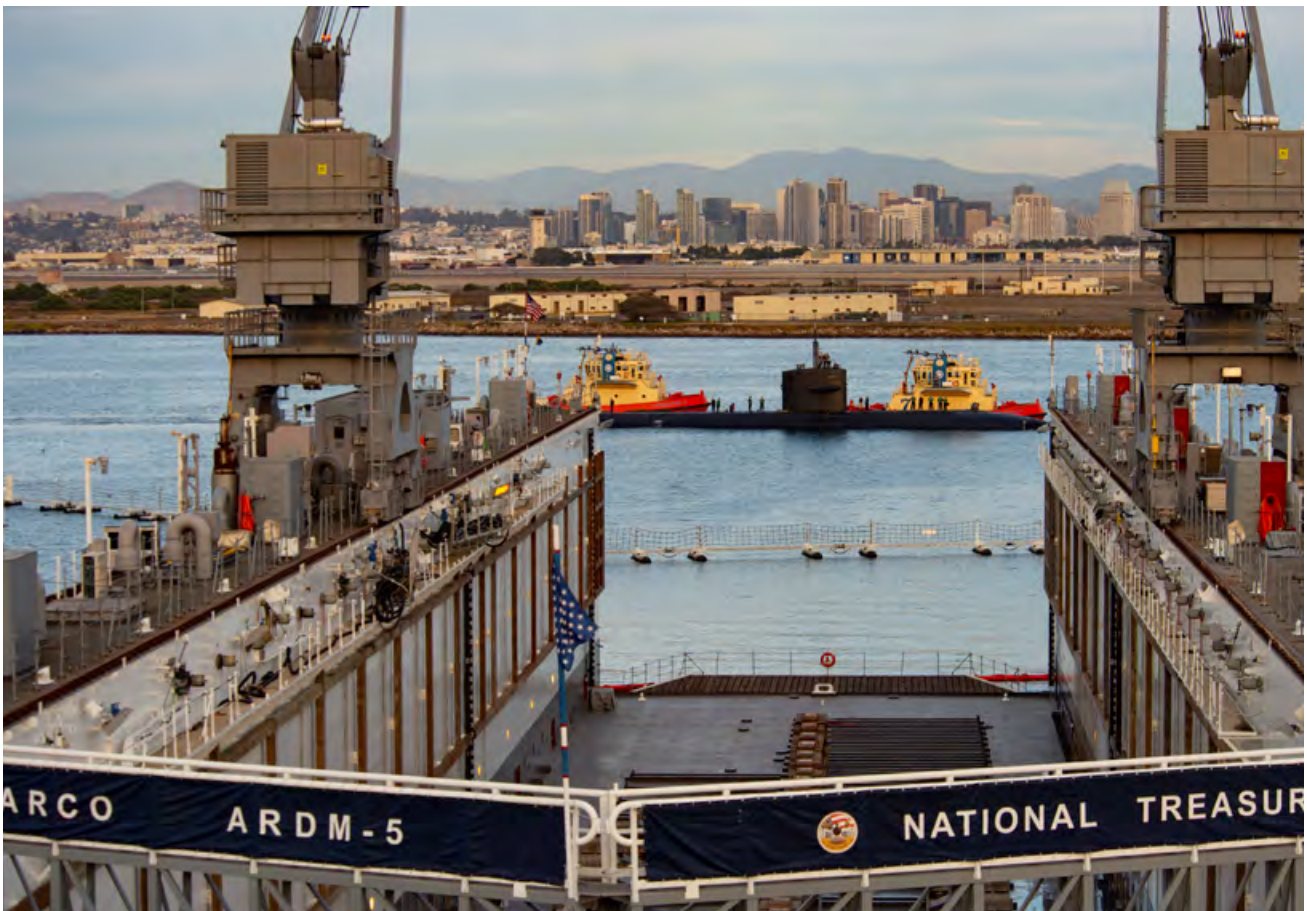
San Diego EDC's Advancing San Diego is "a collaborative effort to prepare San Diegans for quality jobs via locally-serving education institutions, and [to] expand access to diverse, qualified talent for San Diego companies." (FN12) In the manufacturing sector, this initiative focuses on placement to jobs

that require some formal training post-high school diploma and a starting wage of \$19 an hour. Training opportunities are sourced from San Diego's myriad community colleges and vocational institutions. San Diego is well-positioned to increase its manufacturing and technical capability as an existing leader in the innovation and education space.

To meet critical Department of the Navy objectives of delivering one Columbia Class and Two Virginia Class submarines a year, the national Submarine Industrial base will need to grow. While San Diego County does not have the capability to build submarine hulls, the existing ship repair industries can make substantial contributions towards component production and lifecycle support. San Diego's central position in this growth was highlighted by its selection for President Biden's multilateral announcement of the AUKUS partnership in March of this year.

San Diego Regional EDC and its partners hosted the Shipbuilding Regional Industrialization Pilot (SHIP) Regional Visioning event in April 2023, gathering diverse industry, education, policymakers, and civic leaders' perspectives on critical priorities for the shipbuilding industrial base (FN13). The workshop was the first part of a multi-state effort that also included New England and the Great Lakes regions to understand unique regional challenges facing the nation's defense industrial base. As the SHIP team paves the way forward and presents investment recommendations based on the data collected, the





San Diego Regional EDC will continue to support regional defense employers in strengthening their talent pipelines to meet the demands of new regional investments. These efforts will translate to significant regional economic investment and continued meaningful opportunities for San Diego.

PROJECT OVERMATCH

Project Overmatch is another high-priority Department of Navy effort that resides here in San Diego. Project Overmatch is the Navy's contribution to the Joint Force's Joint All Domain Command and Control (JADC2). It will connect platforms, weapons, and sensors together across a widely distributed force to achieve decision advantage over adversaries, and will support carrier strike group deployments in Fiscal Year 2024.



San Diego's Shipbuilding Industrial Base is critical to national security and building our innovation economy.

Representative Scott Peters
United States Congressman

Project Overmatch is working alongside partners and allies, and collaborating with System Commands and Warfare Centers, as well as a consortium of industry experts from large and small businesses, to exploit the most advanced capabilities and technologies available. Its first service contract is currently open for competition, a five-year Engineering Support Services contract as a Small Business Set Aside with more than 130 FTE per year and a market survey estimated value range of \$100-250M. Naval Information Warfare Command (NAVWAR) in San Diego is largely supporting Project Overmatch by focusing on the development of networks, infrastructure, data architecture, tools, and analytics that support the operational and developmental environment to enable sustained maritime dominance for years to come.

United States Marine Corps



The San Diego region hosts the largest concentration of Marine Corps operational and support commands in the United States. With access to the interconnected sea, land, and air ranges our terrain and climate create ideal conditions to prepare Marines for deployed operations including combat. One of every four Marines is stationed in the San Diego Region and even more significantly, 95% of all Marines train in the Southwest (predominantly Southern California) before deploying.

Nearly 150,000 acres of San Diego County are part of the Marine Corps' most important installations, including Marine Corps Base Camp Pendleton, Marine Corps Air Station Camp Pendleton, Marine Corps Air Station Miramar, and Marine Corps Recruit Depot San Diego. San Diego's active-duty Marines total over 69,000 service men and women, and local Marines are active partners with the San Diego community through school volunteer programs while also training alongside and supplementing the San Diego Fire Departments during wildfire and rescue operations.

MARINE CORPS INSTALLATIONS WEST

Located at Camp Pendleton, Marine Corps Installations (MCI) West provides oversight of seven Marine Corps installations on the West Coast. MCI West implements strategies and prioritizes resources to support the operating forces and tenant commands located on these installations. As a regional command, MCI West standardizes support actions across installations and can allocate funding where it is most effective. This support includes building, maintaining, and protecting the infrastructure for utilities;

procuring, distributing, and conserving power and water; providing housing for Marines and their families; and maintaining installation security. MCI West strives to make utilities reliable, secure, and efficient. This includes seeking and developing sufficient and diverse sources of energy and bringing innovative technologies through partnership with state, industry, and academia.



MARINE CORPS BASE CAMP PENDLETON

Encompassing 125,000 acres, Marine Corps Base (MCB) Camp Pendleton is home to the I Marine Expeditionary Force (I MEF), 1st Marine Division, 1st Marine Logistics Group, and major tenant commands including Marine Corps Installations West, Marine Corps Air Station Camp Pendleton, School of Infantry (SOI) West, Naval Hospital Camp Pendleton, and the Marine Corps Tactical System Support Activity. MCB Camp Pendleton's vast acreage, varied terrain, and 17 miles of coastline provide the Marines superb pre-deployment training including combined arms, amphibious operations, and direct air support by rotary and fixed-wing aircraft. MCB Camp Pendleton has more than 41,000 Marines and nearly 3,000 civilian government workers.

MARINE CORPS AIR STATION CAMP PENDLETON

Marine Corps Air Station (MCAS) Camp Pendleton is a critical ship-to-shore training facility covering over 450 acres. The nearly 4,500 Marines assigned operate the air station and aircraft support equipment during all-weather operations that replicate forward-deployed amphibious and combat operations. MCAS Camp Pendleton is also home to Marine Aircraft Group 39 composed of AH-1Z Cobra and UH-1Y Venom light attack helicopter squadrons and two MV-22 Osprey squadrons that are under the 3rd Marine Aircraft Wing command. The aircraft based here provide

combat-ready naval expeditionary capabilities for combat aviation support, aviation ground support, and aviation logistics.

MARINE CORPS AIR STATION MIRAMAR

With over 23,000 acres, Marine Corps Air Station (MCAS) Miramar, located about 14 miles north of downtown San Diego, is home to the 3rd Marine Aircraft Wing (MAW), the aviation element of the I Marine Expeditionary Force. 3rd MAW is comprised of F-35/C Lighting II, F/A-18C/D Hornet, and KC-130J Hercules fixed wing aircraft; and CH-53E Super Stallion and MV-22B Osprey rotary wing aircraft. The nearly 10,000 Marines stationed here base and support aircraft conducting training operations over water and at the inland ranges, including air-to-air and air-to-ground operations.

MARINE CORPS RECRUIT DEPOT SAN DIEGO

Marine Corps Recruit Depot (MCRD) San Diego is located in the Point Loma area of San Diego and is home to the Recruit Training and Western Recruiting Region Headquarters. One of two MCRDs in the United States, MCRD San Diego is responsible for recruiting and providing basic training for 18,000 young men and women recruits who come from states west of the Mississippi River and the Western Pacific. The thirteen weeks of Recruit training transitions young men and women from civilians to United States Marines and includes the development of mental, moral, and physical strength, along with self-discipline, initiative, and decision-making skills. It includes rigorous training in marksmanship, field skills, martial arts, physical fitness, and simulated combat operations.



SPOTLIGHT

MARINE CORPS RECRUIT DEPOT: 100 YEARS OF MAKING MARINES

2023 marks the centennial of Marine Corps Recruit Depot's recruit training in San Diego. MCRD opened its doors in 1921, originally as the Marine Advanced Expeditionary Base San Diego. Two years later, the Marine Recruit Depot for the West Coast relocated from Mare Island, CA to San Diego's newest Marine base, which was soon after renamed Marine



Corps Base San Diego, and so began the 100-year history of making Marines right here in San Diego. Although the base has welcomed several formidable tenants, its main focus has always been the making of Marines. Marine Corps Base San Diego was officially renamed Marine Corps Recruit Depot San Diego in 1948.

Today, seasonal variations place anywhere from 2,300 to 7,000 Marine recruits in the training pipeline at MCRD at one time. These recruits, all of whom raised their right-hand west of the Mississippi, spend 13 weeks training in one of 12 rotating companies, each of which can hold up to 645 young men and, as of 2021, women. The base produced 14,035 basically trained United States Marines in fiscal year 2022. To date, over 1.5 million Marines have graduated from recruit training at MCRD (FN14).

Completion of training culminates in three days of family events, ending with the Graduation Ceremony on Fridays. Families and friends travel to San Diego to witness their loved ones emerge from

a grueling few months of training as proud United States Marines. In fiscal year 2022, 66,709 civilian family members and friends of graduates attended the 41 ceremonies, many staying in San Diego for several days before and after the graduation ceremony to spend time with their Marine and enjoy popular San Diego attractions (FN14). With an average daily hotel rate of \$205 and assuming double occupancy and a four-night stay, 66,709 MCRD graduation attendees spent an estimated \$27M in hotels alone during their stays in San Diego in 2022. MCRD has been a fixture of downtown San Diego for over 100 years and will continue to consistently attract visitors from across the country through the relentless pursuit of its mission to make United States Marines.



SPOTLIGHT

AMERICA'S AIRSHOW 2023



San Diego's annual Miramar Air Show, renowned as the largest and most exciting military airshow in the United States, returned for another spectacular year of thrills and family entertainment. Now rebranded America's Airshow, this free annual event featured thrilling aerial displays and demonstrations by some of the world's most advanced military aircraft, all gathered at Marine Corps Air Station (MCAS) Miramar in San Diego County, California.

Since its establishment in 1953, the airshow has grown into a significant event, providing visitors with access to one of the world's most strategically important and advanced military installations. It has consistently attracted hundreds of thousands of attendees from across the United States and around the world. In the most recent edition, the event drew an estimated 450,000-500,000 attendees. Many of these visitors traveled from outside San Diego County, contributing to the local economy by spending on hotel accommodations, entertainment, transportation, shopping, and dining within the county. America's Airshow continued to underscore MCAS Miramar's commitment to the community, and its planning involved months of effort, thanks in large part to the 5,000 Marines who welcomed a remarkable 100 times the average number of visitors onto the base.

While the influx of tourists and associated spending benefited numerous businesses in the county, it also served as a platform to showcase San Diego County's aerospace and defense industry. This demonstration highlighted the impressive capabilities within the local aerospace sector, resulting in ongoing contracts, investments, and partnerships with economic impacts ranging from millions to billions of dollars.

The promotion of the aerospace and defense industry through the airshow offered additional long-term benefits. For a civilian population increasingly distant from the military, it provided a chance to connect with the local military, gain a deeper understanding of advanced technologies, and inspire the imaginations of the next generation. Local universities offering programs in aerospace, computer science, electrical engineering, and related fields benefited from students witnessing potential careers post graduation. In the last two years, the airshow also hosted an Innovation and Tech Expo, which demonstrated how MCAS Miramar was at the forefront of advancing technologies in data sciences, communications, and energy.

Each year, the team at MCAS Miramar devotes well over twelve months of planning and coordination to ensure all visitors have the memorable experience they come to expect from America's Airshow. MCAS Miramar's Commanding Officer, Colonel Thomas M. Bedell, expressed his excitement about the event, his commitment to delivering an outstanding show, and his gratitude to the community for attending and experiencing the unique atmosphere of the base.

Since its inception in 1953, the enduring legacy of America's Airshow has captivated families. It continues to make a positive impact on San Diego County and will remain a cherished tradition for generations to come.

United States Coast Guard

The U.S. Coast Guard operates under the U.S. Department of Homeland Security during peacetime. During times of war, it can be transferred in whole or in part to the U.S. Department of the Navy under the Department of Defense by order of the U.S. President or by act of Congress. As a branch of the U.S. Armed Forces, a law enforcement organization, a regulatory agency, a member of the U.S. Intelligence Community, and a first responder, the Coast Guard employs a unique mix of authorities, broad jurisdiction, flexible operational capabilities, and a network of partnerships. The Coast Guard is the principal Federal agency responsible for maritime safety, security, and environmental stewardship in U.S. ports and inland waterways.

COAST GUARD SECTOR SAN DIEGO

Coast Guard Sector San Diego provides marine safety, security, and environmental protection to our major seaport and throughout the region. The Sector's Area of Responsibility encompasses more than 150,000 square miles including 60 linear miles of international boundary with Mexico and 114 coastal border miles along the Pacific Ocean. The Coast Guard Sector provides for rapid, coordinated response to emergencies, whether natural or man-made, along with integrated daily operations to enforce regulations governing marine safety, security, and environmental protection. Sector San Diego is responsible for all Coast Guard missions including Search and Rescue, Ports Waterways and



Coastal Security, Waterways Management, Maritime Homeland Security, Marine Science Activities, Aids to Navigation, and Command and Logistical Support.

San Diego is one of few locations that integrate aviation into a Coast Guard sector, operating several MH-60T Jayhawk helicopters. The Sector also houses several patrol boats, utility boats, and special-purpose crafts for law enforcement. Its prime location gives these "Guardians of the Southwest" immediate access to guard and protect the Southwest Maritime border. In addition, the Coast Guard's Joint Harbor Operations Center includes officers from the Department of Homeland Security, the Navy, and the Harbor Police. This unique arrangement strengthens partnerships and allows for rapid coordination that ensures effective emergency response services (FN15).

EACH YEAR, COAST GUARD SECTOR SAN DIEGO:

- » Performs safety inspections on 620 domestic vessels
- » Oversees the safety of ~1.2M commercial maritime passengers
- » Maintains 97 aids to navigation
- » Participates in approximately 250 Search and Rescue cases
- » Saves approximately 150 lives
- » Seizes over \$2.5 million worth of illegal narcotics
- » Assists approximately 250 mariners in distress
- » Apprehends approximately 1,200 undocumented migrants
- » Responds to and investigates over 230 pollution cases



SPOTLIGHT

SKILLBRIDGE

According to a 2017 report by the San Diego Regional Chamber of Commerce, approximately 15,000 service members transition out of the military in San Diego each year (FN16). Of those, 50% leave the county to pursue new opportunities elsewhere. The top destinations include Texas, Arizona, and Nevada. Several factors contribute to this high rate of out-migration. Some veterans leave San Diego because they find it difficult to find employment in their desired fields. Others leave because they find the cost of living in San Diego to be too high.

The loss of veterans to out-migration is a significant concern for San Diego. Veterans are a valuable asset to the local economy. According to LinkedIn's Veteran Opportunity Report, veterans are 39% more likely to be promoted than their peers and 8.5% more likely to remain at their initial company than their peers (FN17). Veterans are also 160% more likely to have a graduate degree or higher. Combined with the leadership, strong problem-solving skills and domain knowledge gained while in service, the loss of this talent comes at a high cost for the county.



It's common for veterans to face certain challenges as they navigate their transition. These can include translating their experience into civilian roles, establishing new professional networks, or even navigating common stereotypes. However, programs like Skillbridge help to bridge that gap and allow employers to identify non-traditional talent for their companies.

An initiative launched by the U.S. Department of Defense and Department of Labor, Skillbridge helps transitioning service members gain civilian work experience and skills through internships and

apprenticeships (FN18). During the last 180 days of their military service, service members can participate in training and work experiences with participating employers, allowing them to explore career fields, acquire new skills, and make connections with potential employers. The program facilitates a smoother transition into the civilian workforce by providing practical training, valuable work experience, and industry-specific skills.

Locally in San Diego, the benefits of the program have been reaped by Corient, which was at the time known as Dowling & Yahnke. When Billy Walsh was looking to transition from the Navy after serving 23 years as a helicopter pilot, his desire to leverage his leadership experience and passion for working with teams to achieve goals led him to his Skillbridge program at Dowling & Yahnke. After meeting with Mark Wernig, the co-CEO, and Will Beamer, the President (both fellow Navy veterans), Billy became their first Skillbridge participant. Throughout the program, Billy gained experience and added value in portfolio analysis, prospect meetings, research projects, and presentation support for Lead Advisors. He grew his network through professional development and charity fundraisers. It was through these experiences that Billy was able to explore two roles that aligned with his goals: Wealth Advisor and Financial Planner. Today Billy works full-time at Corient as a high-performing Wealth Advisor.

Each year thousands of veterans begin their transition into civilian life. The best way we can thank our veterans for their service is to offer meaningful employment opportunities post-military service. Programs like Skillbridge not only bring in non-traditional talent into companies but also help to keep our nation's brightest in America's Finest City.

U.S. Department of Veterans Affairs

The Department of Veterans Affairs runs programs benefiting Veterans, their families, their caregivers, and their survivors. It offers educational opportunities and rehabilitation services and provides compensation payments for disabilities or death related to military service, as well as home loan guaranties, pensions, burials, and health care that includes the services of nursing homes, clinics, and medical centers. In the San Diego region, there are more than 225,000 veterans, about 16% of our local population.



VETERANS BENEFITS ADMINISTRATION SAN DIEGO REGIONAL OFFICE

The San Diego Veterans Affairs Regional Office (VARO) administers a wide array of benefits to Veterans living in San Diego. These Veterans have served the nation in various conflicts, dating back to World War II. The Veteran's Benefits Administration, part of the VA, aids servicemembers in their transition from active duty to civilian life and supports them and their families through education benefits, home loans, life insurance, and much more. (FN19)

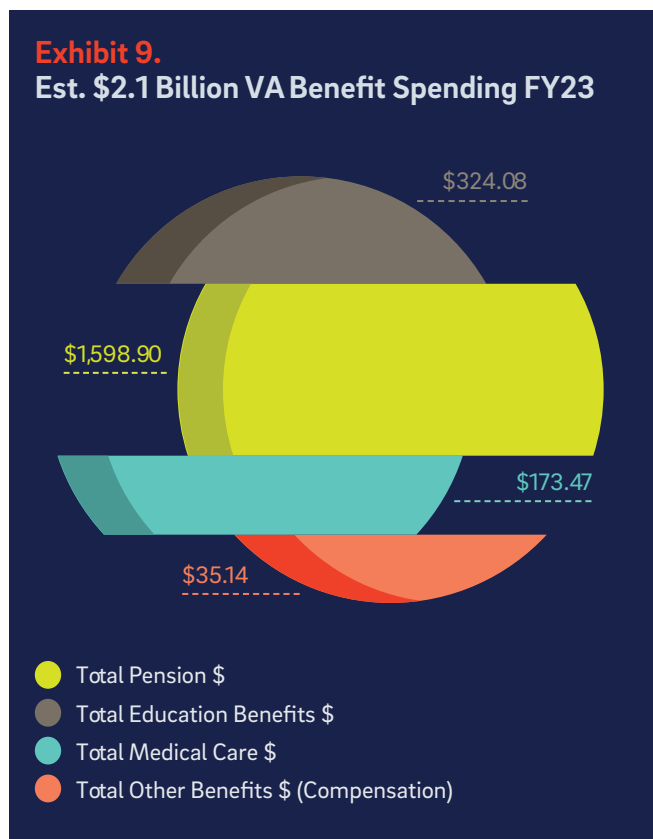
During Fiscal Year 2023, the San Diego VA Regional Office administered approximately \$35 million in VA for non-service-connected pension benefits for Veterans and survivors based on wartime service. \$324 million in total education benefits, \$173 million in total medical care in San Diego County alone, and \$1.6 billion in VA Compensation benefits (Exhibit 9). The San Diego VA Regional Office's approximate \$2.1 billion spending in FY 2023 is down 6.3% from last year.

VETERANS HEALTH ADMINISTRATION SAN DIEGO

VA San Diego Healthcare System provides comprehensive medical inpatient and outpatient

services through their facility in La Jolla and outpatient services in six different clinics across the county, through the nation's largest integrated healthcare network, employing over 3,700 people in San Diego in FY 2023 (FN5).

Exhibit 9.
Est. \$2.1 Billion VA Benefit Spending FY23





Summary



This past year marks a return to normal for the San Diego regional economy, as it does for most of the United States. Earlier in this cycle, we noted that defense spending tends to rise during periods of distress. Our compilation of military economic activity in the region from 2019 to the present clearly illustrates this arc, quantifying the stability provided by long-term defense infrastructure and operations commitments along with the boost provided by rapid response emergency commitments. Together, these two drivers preserve and fuel the economic engine of resilience, which has propelled San Diego into a smoother and more predictable recovery than much of the US.

As we look ahead to more normal economic times, we stand to benefit from another aspect of our regional military activities, that federal commitments tend to be indexed to inflation. With military pay rising by 4.6% in 2023 and 5.2% in 2024, defense dollars are already poised to buffer the effects of our nation's economic uncertainties and will continue to invest in the long-term drivers of regional prosperity like our innovation economy.

Acknowledgments

SDMAC and the UC San Diego Rady School of Management would like to thank our local Marine Corps, Navy, Coast Guard, and VA and San Diego community for their enormous support in making this report possible. In particular, members of the following organizations provided data used in this report: Commander Navy Region Southwest, Commander Marine Corps Installation West, Commander

Naval Medical Forces Pacific, Sector Commander Coast Guard Sector San Diego, Marine Corps Air Station Miramar, Marine Corps Recruit Depot San Diego, the San Diego Department of Veterans Affairs Regional Office (VARO), the VA San Diego Healthcare System (VASDHS), Blue Star Families, and the San Diego Association of Governments (SANDAG).





Footnotes

FN1 – Auerbach, Alan J., Yuriy Gorodnichenko, and Daniel Murphy. Local Fiscal Multipliers and Fiscal Spillovers in the USA. *IMF Economic Review* (2020) 68:195-229.

FN2 – Chodorow-Reich, Gabriel. Geographic CrossSectional Fiscal Spending Multipliers: What Have We Learned? *American Economic Journal: Economic Policy* (2019), 11(2): 1-34

FN3 – Bureau of Economic Analysis data. See the supplementary document for more detail on calculations.

FN4 – Bureau of Labor Statistics; San Diego Labor Force https://www.bls.gov/regions/west/ca_sandiego_msa.htm#eag_ca_sandiego_msa1.f.p

FN5 - Data provided directly from military sources. See supplementary documentation for more detail

FN6 – Navy T2
<https://www.navytechtransfer.navy.mil>

FN7– NIWC PAC
<https://www.niwcPacific.navy.mil/About>

FN8 – Innovating for National Security (i4NS)
<https://innovation.ucsd.edu/about-oic/programs/innovating-for-national-security.html>

FN9 – Coast Guard Blue Technology Center of Expertise <https://www.dcms.uscg.mil/Portals/10/CG-9/Acquisition%20PDFs/Factsheets/BTCOE.pdf?ver=05GqHBS17662XHElbSndWA%3D%3D>

FN10 – Project Recover <https://www.projectrecover.org/dpaa-accounts-for-aom1c-anthony-di-petta/>

FN11 – Naval Medical Center San Diego
<https://sandiego.tricare.mil/About-Us>

FN12 – Advancing San Diego <https://www.sandiegobusiness.org/about-edc/our-initiatives/advancing-san-diego/>

FN13 – Talent Flow Analysis released at the SHIP Regional Visioning event <https://www.sandiegobusiness.org/blog/talent-flow-analysis-released-at-the-ship-regional-visioning-event/>

FN14 - Data provided from Marine Corps Community Services (MCCS) and MCRD Community Liaison

FN15 – Coast Guard Sector San Diego <https://www.pacificarea.uscg.mil/Our-Organization/District-11/District-Units/Sector-San-Diego/>

FN16 – San Diego Regional Chamber Foundation - Veteran Employment in San Diego <https://sdchamber.org/wp-content/uploads/2017/11/Veteran-Employment.pdf>

FN17 – LinkedIn Veteran Opportunity Report <https://socialimpact.linkedin.com/content/dam/me/linkedinforgood/en-us/resources/veterans/LinkedIn-Veteran-Opportunity-Report.pdf>

FN18 – DOD Skillbridge
<https://skillbridge.osd.mil/program-overview.htm>

FN19 - SD population <https://www.census.gov/quickfacts/fact/table/sandiegocitycalifornia/PST045219>



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