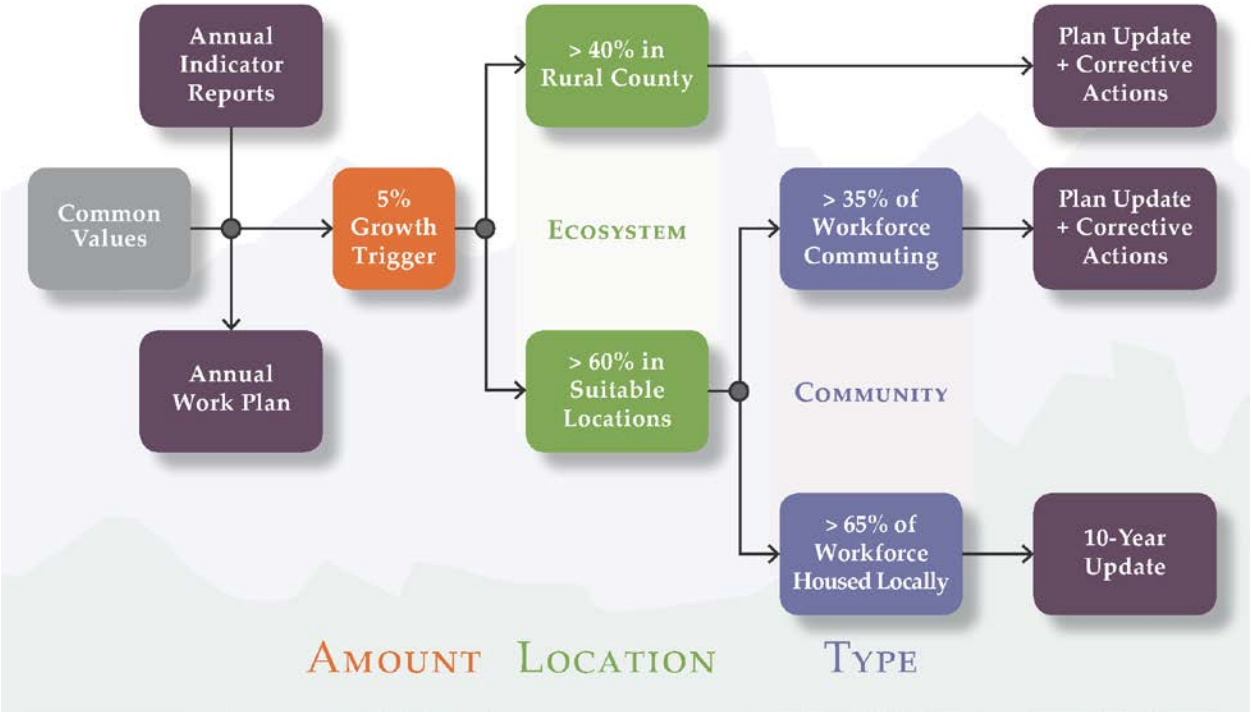
2013 Annual Indicator Report (DRAFT 4/18/13)

The Jackson/Teton County Comprehensive Plan includes a Growth Management Program – a quantitative review structure that provides the measurability and accountability needed to ensure the community will achieve our Vision. The Growth Management Program allows the community to be adaptive, responsible and decisive in addressing the amount, location and type of growth. A trigger, targets, and feedback mechanisms provide a structure to continuously verify the path the community is on and correct course when necessary to ensure our desired community character is realized.



The Annual Indicator Report and Annual Work Plan are not a part of the Growth Management Program directly, but work in conjunction with the Growth Management Program as illustrated above. If the targets of the Growth Management Program are the community's final exam, the indicator report is the annual quiz. The indicators monitor not only the Growth Management Program targets but other measures of the amount, location and type of growth to better inform the community's implementation decisions on how best to achieve our Vision. Each spring the community reviews the indicators listed below and other appropriate indicators to inform budgets and set an implementation work plan that will promote success when the Growth Management Program is triggered.

The following table lists the annual indicators the community considers as part of the annual monitoring of the Plan. While indicators not listed below can be measured, in this first report only those indicators listed in the Comprehensive Plan were evaluated.

Annual Indicator	Goal	Measurement Method
AMOUNT		
1. Buildout • Number of dwellings • Non-residential (sf)	< 1994 Levels	Town/ County
2. Growth by Type: • Dwelling Units • Visitor Retail (sf) • Non Profit (sf) • Lodging Units • Government/ Civic (sf) • Private Office (sf) • Local Retail (sf)	Monitor	Town/ County
3. Effective Population	Monitor	JHCA
4. Traffic Growth	Reduce	WYDOT/Town/County
5. Energy Load	Maintain	Lower Valley Energy
6. Annual Monitoring and Implementation	Complete	Town/County
LOCATION		
7. Rural Area vs. Complete Neighborhoods • By Character District	40/60	Town/ County
8. Permanently Conserved Land • Habitat • Agricultural • Scenic	Increase	Town/ County
9. Redevelopment vs. New Construction • By Character District	Monitor	Town/ County
10. Wildlife Vehicle Collision	Decrease	JH Wildlife Foundation
TYPE		
11. Workforce Housing %	≥ 65%	TCHA
12. Affordability of Housing	Monitor	TCHA
13. Workforce Housing Stock	Monitor	TCHA
14. Jobs, Housing Balance	Monitor	Town/ County
15. Lodging Occupancy by Season	Increase	Chamber
16. Employment • By sector	Monitor	State
17. Population served by START	Increase	START
18. % of Transportation Network "complete streets"	Increase	Pathways
19. Level of Service • By Service	Monitor	Town/ County

Staff has worked to gather 2012 data on each indicator as well as past data to show trends that put the past years data in context. Each indicator below is organized to show the past year's data first with the trend data to follow. Staff has provided limited analysis of each indicator, however anticipates adding additional analysis prior to the May review of the annual work plan based on questions and comments received on this draft.

Part of the process of developing this first indicator report has been to establish methodologies and mine data for the information desired. In the future this process will be easier as data entry will be modified so the desired data is easy to retrieve. However the effort this draft of the indicator report is

incomplete, and in other cases less accurate than desired. Staff has attempted to note these instances and will refine the report in the future. Given the work being done to update the LDRs Staff felt that it was important to report the available numbers.

Amount of Growth

1. Buildout

Buildout is the total amount of development allowed on a property. As a result, it is a function of zoning and other development restrictions. The only way to change buildout is through a zone change or deed restriction on the development of a property. Such deed restrictions most often take the form of Conservation Easements or sale of land to a Federal land manager. In 2012 there were no rezones that resulted in a change in potential units or allowed nonresidential development. At this time Staff has not been able to review all of the conservation easements from 2012 to determine the number of units that have been eliminated. However, a number of the easements reserved no building envelope so it is safe to assume that **buildout decreased in 2012**.

While Staff is working to fill the data gap between 2007 and 2012, below is the trend from 1994 to 2006 as determined by Staff in 2007. As mentioned above, Staff will continue to refine this number so that a full picture of any changes to buildout can be understood as the LDR Update continues

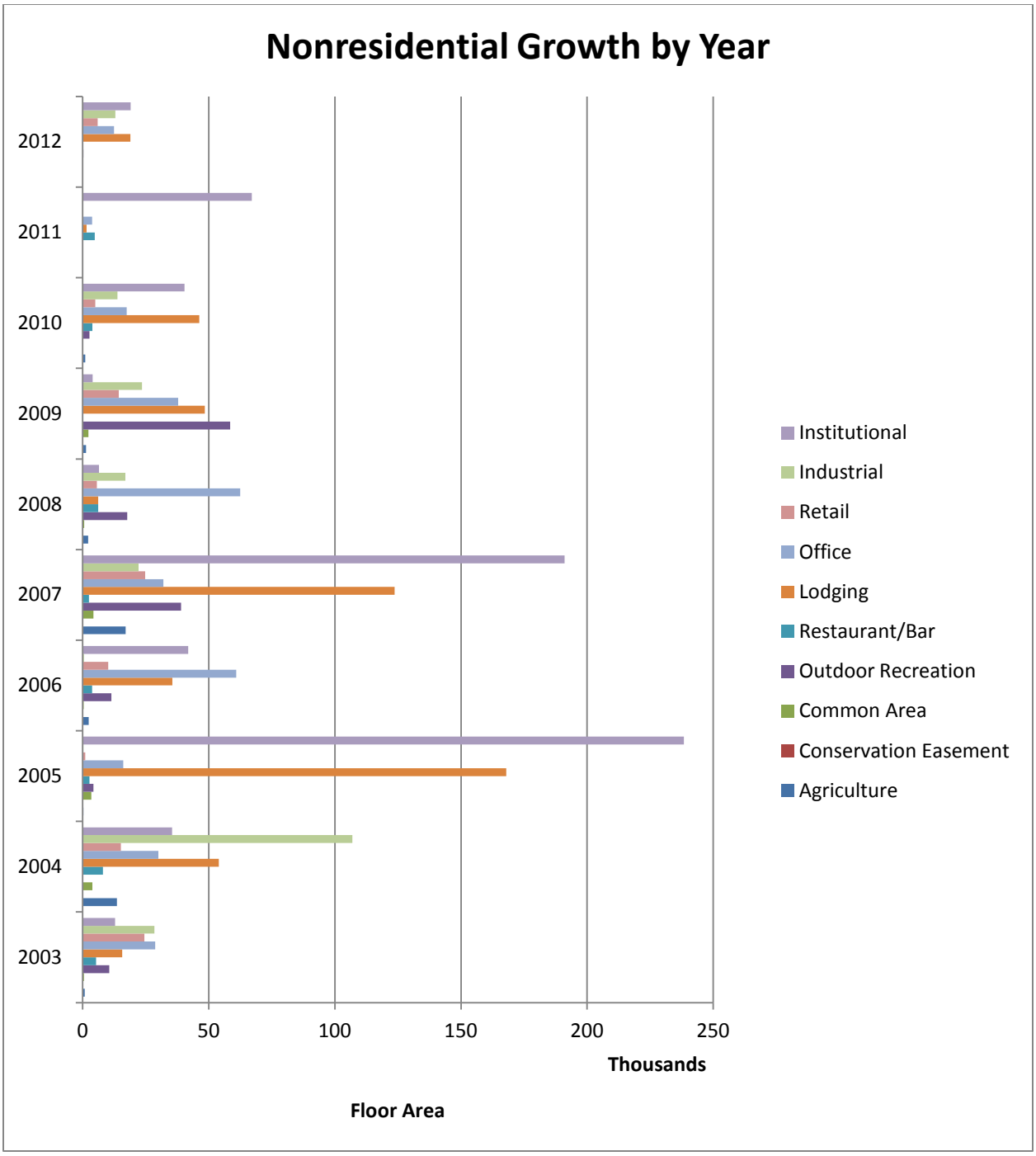
1994-2006 Net Change in Development Potential		
Zone Changes	Conservation Easements	Total
325	-906	-581

2. Amount of Growth by Use

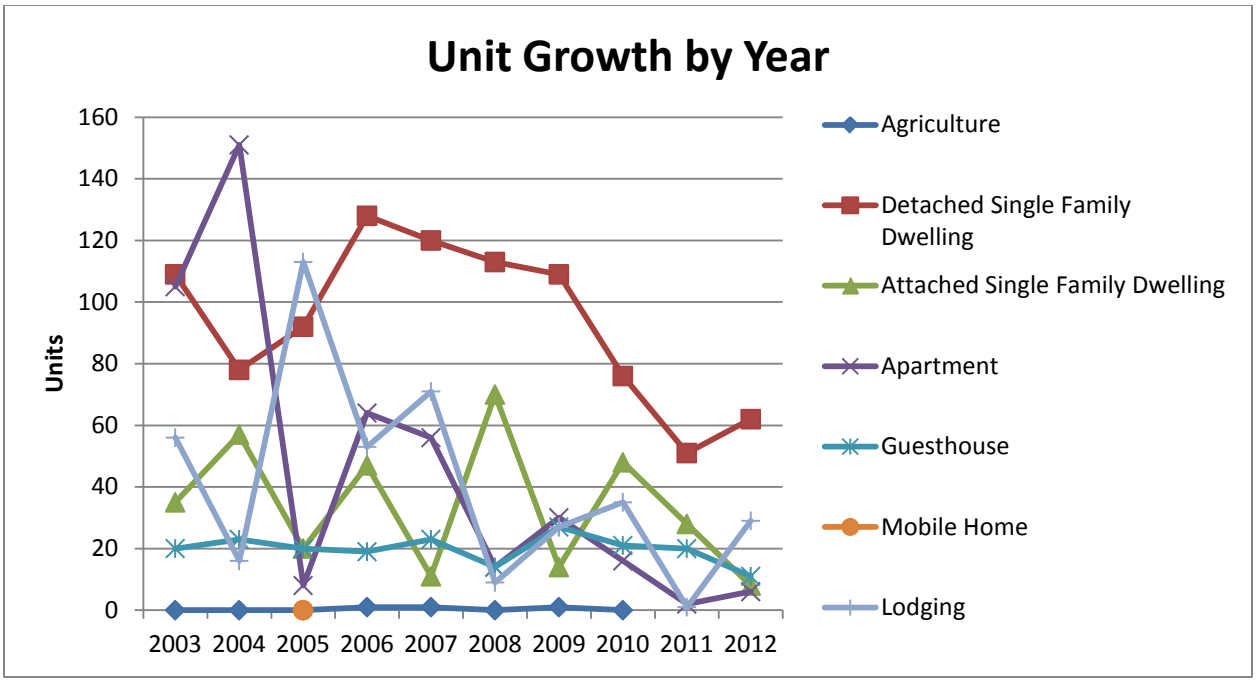
Residential growth is the trigger of the Growth Management Program. When growth since adoption reaches 5% the Growth Management Program review is required. Residential growth since adoption is represented by the lower-right corner in the below table. Since adoption, we have grown about 0.8%. This number is likely a little high. Staff is working to refine the building permit data to ensure that instances where a unit was demolished and a new unit built in its place was not counted as a new unit for the purposes of analyzing growth. The date of January 1, 2012 was used as the date of comparison because Assessor data was used to establish the baseline and Assessor data represents the development on a property as of the first of the year. Guesthouses and lodging units are not counted as residential units.

Growth by Use			
Use	Existing 1/1/12	2012 Growth	Growth Since 1/1/12
Floor Area			
Agriculture	1,019,446		0.0%
Conservation Easement	15,943		0.0%
Common Area	59,403		0.0%
Outdoor Recreation	338,135	221	0.1%
Detached Single Family Dwelling	21,990,121	294,872	1.3%
Attached Single Family Dwelling	2,631,716	14,014	0.5%
Apartment	1,256,768	9,663	0.8%
Guesthouse	736,363	8,735	1.2%
Mobile Home	535,728		0.0%
Restaurant/Bar	408,470		0.0%
Lodging	5,270,931	18,899	0.4%
Office	1,267,425	12,414	1.0%
Retail	1,582,368	5,933	0.4%
Industrial	1,417,546	12,951	0.9%
Institutional	1,931,522	18,958	1.0%
NonResidential Floor Area	13,235,843	69,376	0.5%
Units			
Agriculture	211		0.0%
Detached Single Family Dwelling	5,917	62	1.0%
Attached Single Family Dwelling	1,853	8	0.4%
Apartment	1,541	6	0.4%
Guesthouse	758	11	1.5%
Mobile Home	348		0.0%
Lodging	5,875	29	0.5%
Residential Units	9,870	76	0.8%

The trend in nonresidential growth over the past ten years shows development of institutional floor area and lodging floor area generally outpacing growth of other nonresidential uses. Nonresidential growth in 2012 was low compared to other years, but the trend data does illustrate the impact a single large building can have on the data.



While the construction of all residential and lodging unit types other than guesthouses has dropped over the since the peaks from 2004 to 2006, it appears growth of detached single family homes, lodging units, and apartment units may again be on the rise. Attached dwelling units are not as consistent as detached units, but remained off in 2012 as other unit types began growing again.



3. Effective Population

Effective population is a measure of the number of people actually in the community including full-time residents, seasonal residents, and visitors. The Jackson Hole Conservation Alliance is still working on a replicable methodology for measurement of effective population. When a methodology is developed and the data is available it will be added to the report.

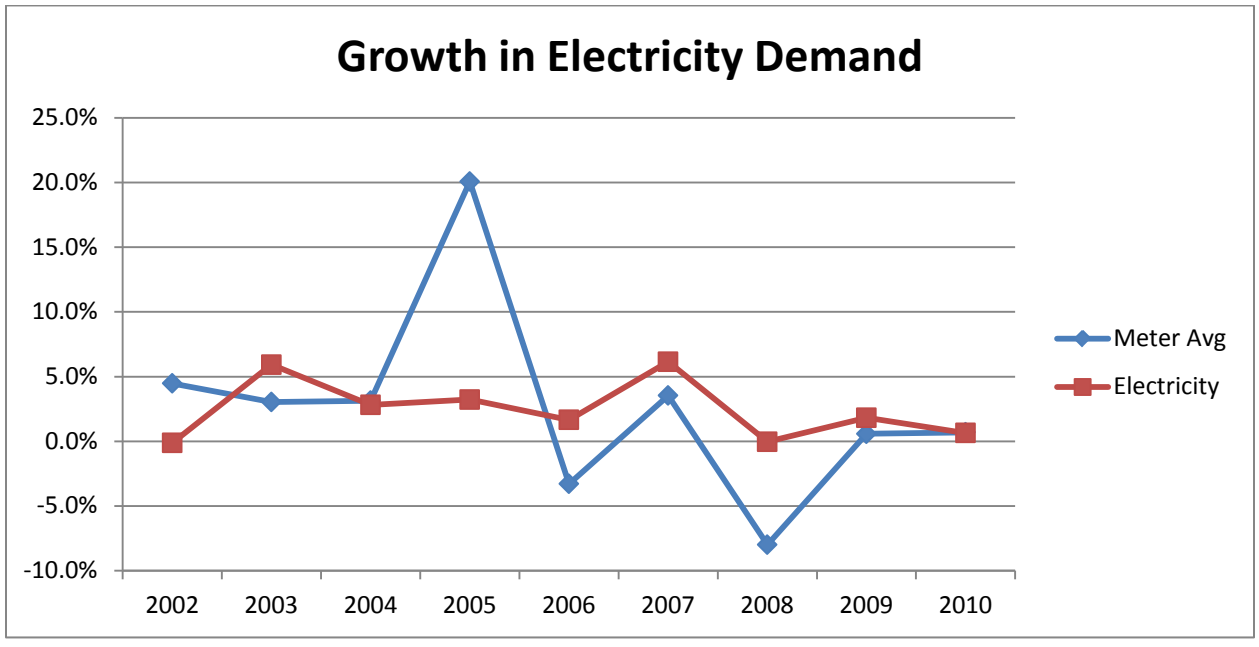
4. Traffic Growth

The most recent traffic data we have from WYDOT is for 2010. The below table shows traffic growth from year to year. The large swings likely indicate gaps in data especially when they follow years that show no growth or decline. The data appears to show that in 2010 traffic decreased on Highway 22 and Highway 390. The trend also shows that traffic south of Town has grown the most and the most steadily over the past 10 years. Data for in Town roads may also be available and will be included if possible. The Integrated Transportation Plan to be developed will establish indicators and monitoring methods better suited to the policies of the Comprehensive Plan.

Traffic Growth by Year											
Highway	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2001-2010
89 @ Astoria	1.4%	1.1%	0.3%	2.7%	4.5%	-1.8%	2.6%	-7.0%	53.4%	0.0%	**58.5%**
89@ South Park	8.1%	4.0%	0.5%	-0.2%	2.0%	8.0%	0.2%	8.7%	12.1%	0.0%	**51.7%**
89 @ High School Rd.	3.6%	1.0%	0.5%	-0.2%	0.3%	31.0%	0.3%	0.0%	5.3%	0.0%	**45.5%**
89 @ the Y	9.1%	1.0%	0.5%	-0.2%	0.0%	5.0%	0.2%	0.0%	13.2%	0.0%	**31.6%**
Broadway @ the 5-way	0.7%	28.9%	0.5%	-0.2%	0.0%	1.6%	0.3%	0.0%	-16.5%	0.0%	**10.9%**
Broadway and Cache	5.0%	-4.5%	0.5%	-0.2%	0.0%	-1.7%	0.2%	0.0%	15.5%	0.0%	**14.3%**
Cache @ Town Limit	-2.6%	16.6%	0.5%	-0.2%	0.0%	-7.6%	0.3%	0.0%	1.1%	0.0%	**6.7%**
89 @ Park Boundary	4.4%	17.3%	0.5%	-0.2%	0.0%	-13.8%	0.3%	0.0%	49.0%	0.0%	**58.3%**
22 @ the Y	6.4%	-0.2%	0.8%	1.0%	-0.8%	-5.9%	0.3%	-4.2%	0.6%	-1.2%	**-3.7%**
22 @ Hwy 390	7.3%	-0.2%	-2.1%	2.0%	-1.4%	1.1%	3.2%	-0.9%	10.2%	-9.9%	**8.1%**
22 @ Wilson	-3.8%	2.6%	0.7%	1.1%	-1.1%	14.4%	0.6%	1.9%	16.9%	-1.2%	**34.6%**
390 @ Hwy 22	6.3%	4.9%	-6.3%	-3.2%	1.4%	1.9%	3.1%	1.3%	-4.6%	-6.0%	**-2.0%**
390 @ Teton Village	-0.4%	26.8%	0.2%	-3.2%	2.5%	-11.5%	0.6%	0.9%	0.6%	-1.2%	**12.0%**

5. Energy Load

The most recent data available from Lower Valley Energy was through 2011. The below table shows growth in electricity demand. Staff is still working to show propane and natural gas demand numbers accurately. Meter average represents the average number of active meters for the year. The growth in electricity demand over the past 10 years was steady in 2004 through 2008 at 3% - 6% but over the past three years growth has been fairly minimal. While this may appear to indicate we are achieve our goal of maintaining energy usage even as population grows, in fact the growth in electricity demand has equaled or outpaced growth in number of meters in each of the last five years indicating a lack of electricity conservation.



6. Annual Monitoring and Implementation

This report represents the desired annual monitoring. The second annual work plan will review the implementation slated for Fiscal Year 12-13 and establish a work plan for the fiscal year beginning July 1, 2013. As discussed in the introduction, this first annual indicator report is not complete and some indicator data sources are still being developed. However the purpose of this indicator was to monitor whether time and resources were being made available for long-range planning in the community. Other work being completed parallel with the indicator report such as the overall LDR Diagnosis and Updates to the Lodging Overlay and tools available in Rural Areas are complementary to the intent of monitoring the annual indicators.

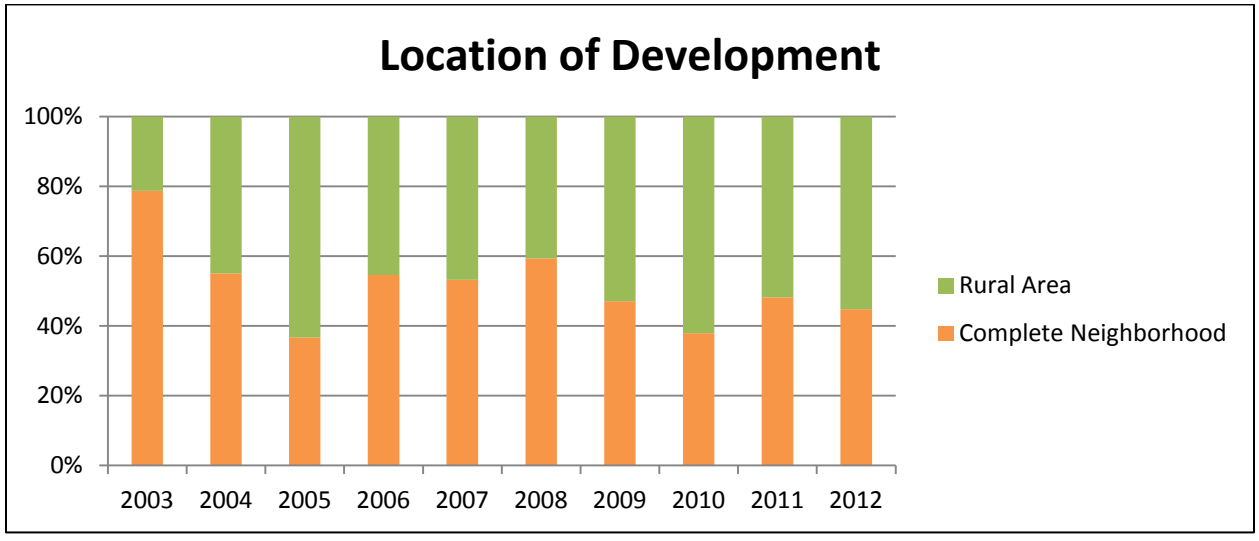
Location of Growth

7. Location of Growth

The location of growth – in complete neighborhoods or rural areas – is the first target of the Growth Management Program. The goal is for 60% of growth to occur in Complete Neighborhoods. In 2012 only 45% of growth occurred in Complete Neighborhoods. As discussed above there may actually have been less growth in Complete Neighborhoods than initially thought because of scrape and rebuild projects. As the building permit data is refined, comparison to the location of growth target will be updated. The Character District with the most growth was the County Valley accounting for 37% of growth by itself.

Growth by District		
	2012 Growth	
District	Nonresidential Floor Area	Residential Units
Complete Neighborhoods		
1: Town Square	-	-
2: Town Commercial Core	26,694	2
3: Town Residential Core	-	9
4: Midtown	4,606	7
5: West Jackson	15,476	2
6: Town Periphery	3,000	6
7: South Highway 89	12,951	1
8.4: Hoback	-	-
11: Wilson	-	3
12: Aspens/Pines	-	-
13: Teton Village	993	4
14.2 & 14.3: Alta Core & Targhee	-	-
Complete Neighborhoods	92%	**45%**
Rural Areas		
8: River Bottom	-	4
9: County Valley	3,089	28
10: South Park	221	4
14: Alta	-	2
15: County Periphery	2,346	4
Rural Areas	8%	**55%**

The trend over the past ten years shows that in only two years (2003 and 2008) have we met our goal of having 60% of growth occur in Complete Neighborhoods.

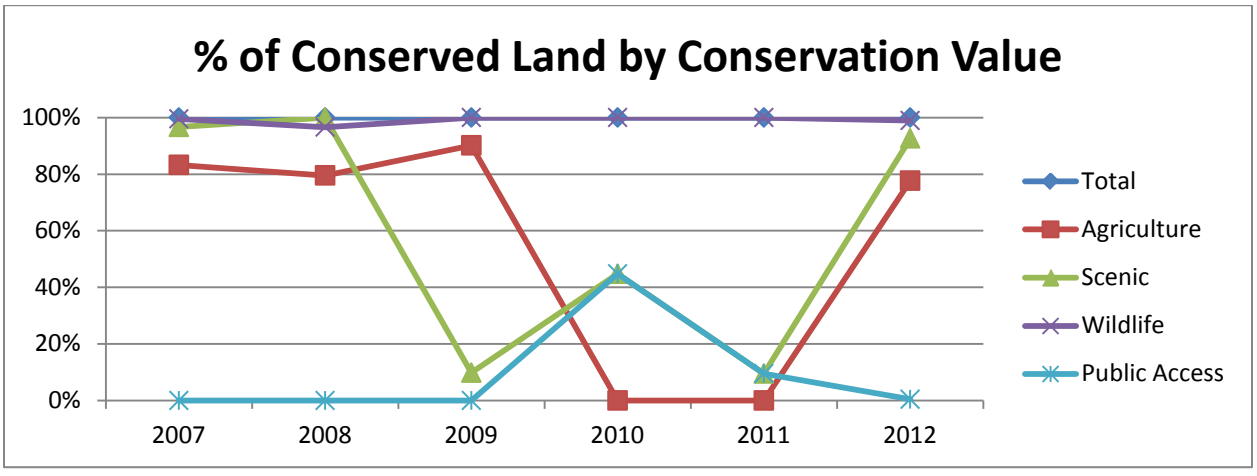


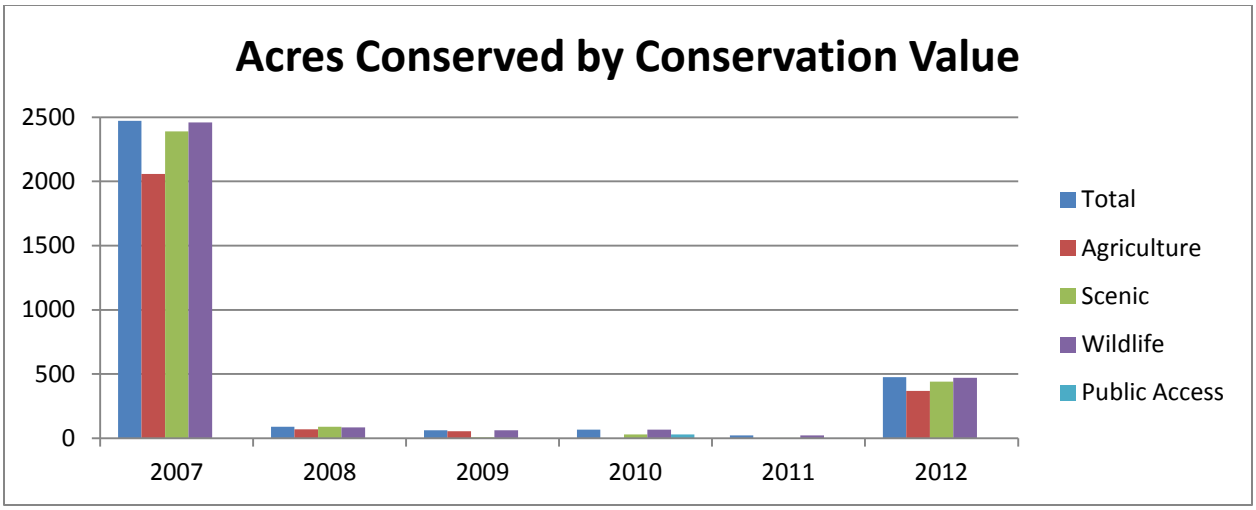
8. Permanently Conserved Land

In 2012, 475 acres were placed under conservation easement. Much of that land has multiple conservation values so the columns in the table below do not add up to the totals. The conservation values of all conservation easements is not available at this time, however Staff will work to establish that data so that future indicator reports will include a picture of the values we have conserved in the community.

2012 Land Conserved by Conservation Value		
	Easements	**Acres Conserved**
Agriculture	4	369
Scenic	7	440
Wildlife	7	470
Public Access	1	2
2012 Total	8	475

Conservation Easement data from the past has not been consolidated into a single format in order to give a full report on trends. At this time the only trend that we can report is the Jackson Hole Land Trust's work over the past 5 years. Their work represents the majority of the conservation easements, but other easements were put in place as well. Staff will continue to refine the available data and update the report to include all conservation easements. Nearly all land conserved over the past 5 years includes the preservation of wildlife values. The large fluctuations in the 2008 through 2011 data have to do with the fewer number of easements in the period.



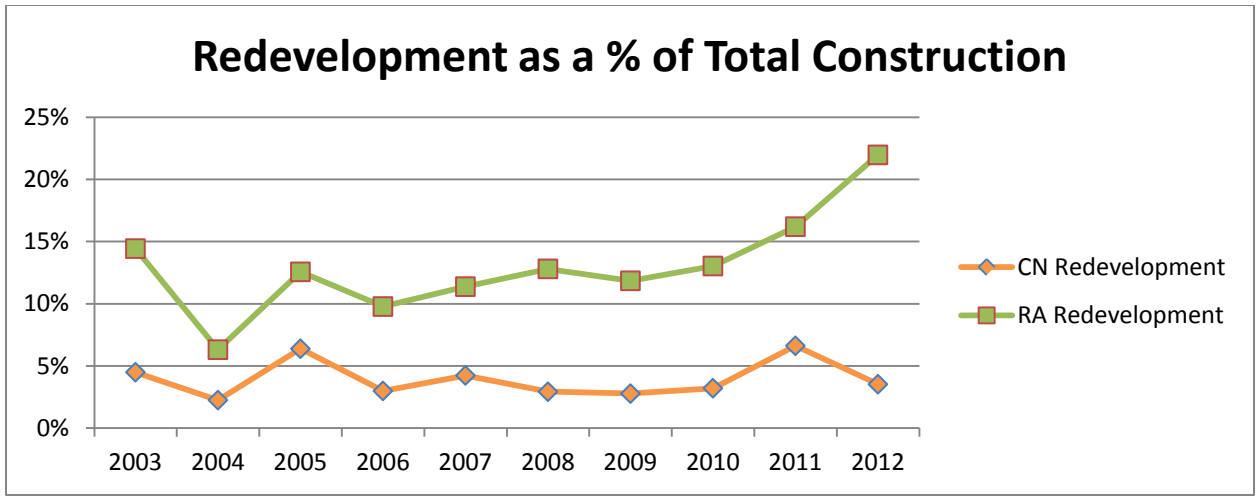


9. Redevelopment vs. New Construction

The goal of the Comprehensive Plan is to develop the most appropriate places for development (Complete Neighborhoods) into the desirable places to live. In addition to looking at the location of new growth the community also wants to monitor the amount of redevelopment that is occurring. The below table is based on the total floor area, whether new or remodeled, in building permits for the Town and County. The table shows the percentage of that total construction activity was redevelopment. The remaining work was new construction. The numbers for 2012 are not as accurate as future data will be as the Town and County data entry will better track this indicator in the future. Also, remodels and other minor construction activities that do not require building permits are not included as redevelopment or included in the total.

2012 Redevelopment as % of Total Construction		
	Nonresidential Floor Area	Residential Floor Area
Total Construction	**69,376**	**343,232**
Complete Neighborhood Redevelopment	3%	4%
Rural Area Redevelopment	5%	22%
Total Redevelopment	8%	26%

While the numbers are not entirely accurate, they do indicate that he community is not achieving the desired level of redevelopment. While this conclusion is likely true, the data set used to measure redevelopment is not the most accurate. The 10 year trend shows that residential redevelopment in the rural areas is trending up as a percentage of construction. This is good news for the community's goals to limit growth in number of units, however it does indicate an increase in the size of residences in Rural Areas which impacts character, workforce generation, and housing affordability. Only residential trends are shown because the nonresidential trends are so volatile. For example a single large remodel could represent 70% of all nonresidential construction in a given year as it did in 2011 for Rural Areas.



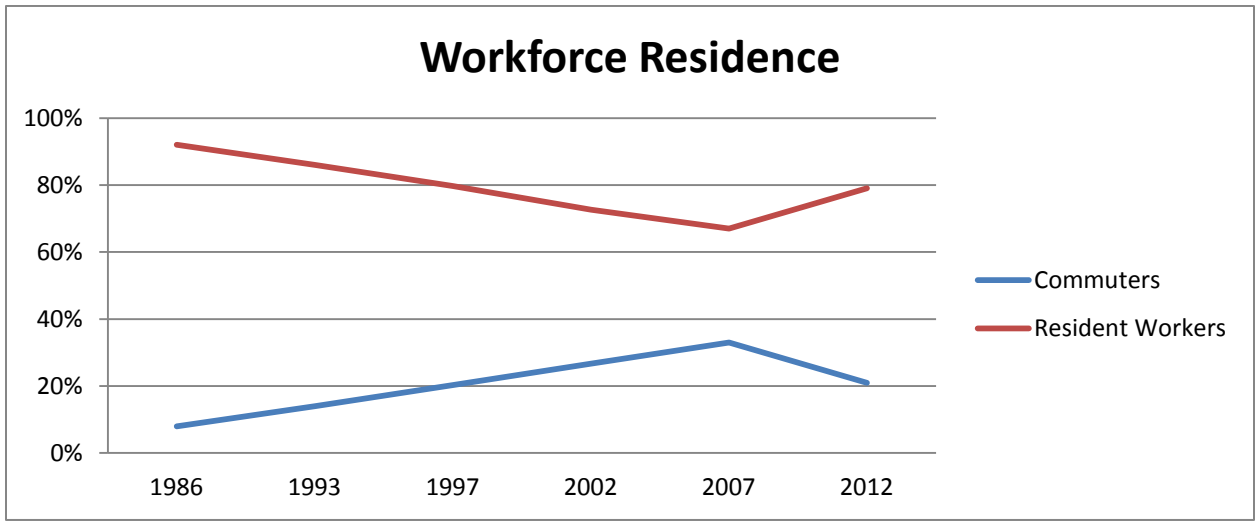
10. Wildlife Vehicle Collisions

Data for wildlife vehicle collisions is available from a number of sources; however Staff has not compiled the data at this time. When the data is compiled it will be added to the report.

Type of Growth

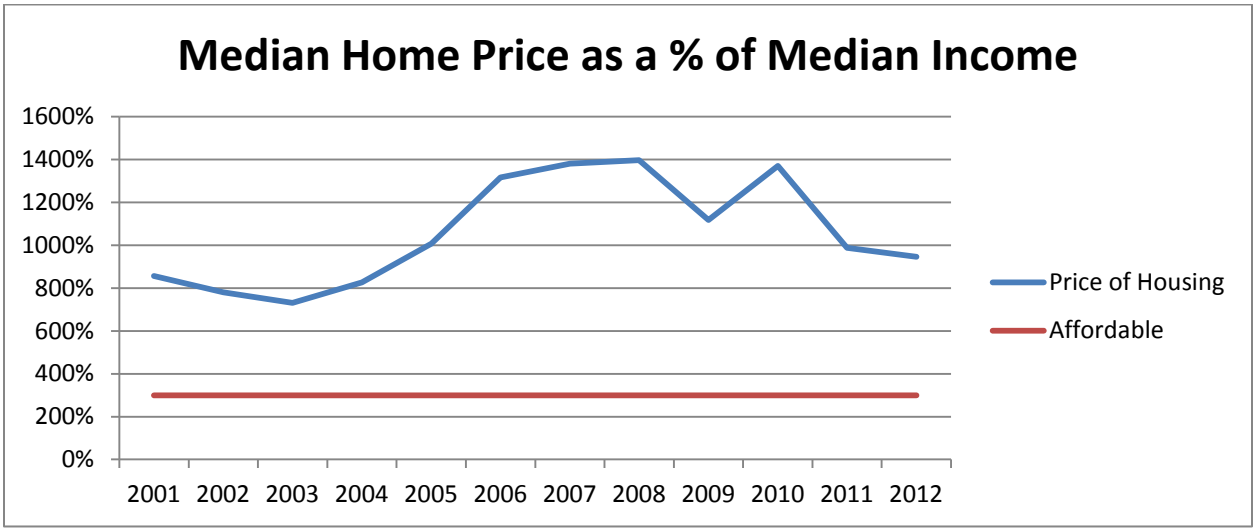
11. Workforce Housing Percentage

The Growth Management Plan target to ensure that growth is of the type desired by the community is maintenance of 65% of the local workforce living locally. According to an employer survey conducted in the fall of 2012, **79% of the workforce lives in Teton County**. This bodes well for the community. Although, challenges will arise as the housing market rebounds and the community begins to address the retirement of the aging workforce. As the long-term trend shows, commuting steadily increased as housing affordability decreased throughout the early nineties. The current decrease in commuting coincides with the adjustment of the housing market, but commuting is still at a higher level than it was in 1993 when the community first identified the potential loss of a resident workforce as an issue.



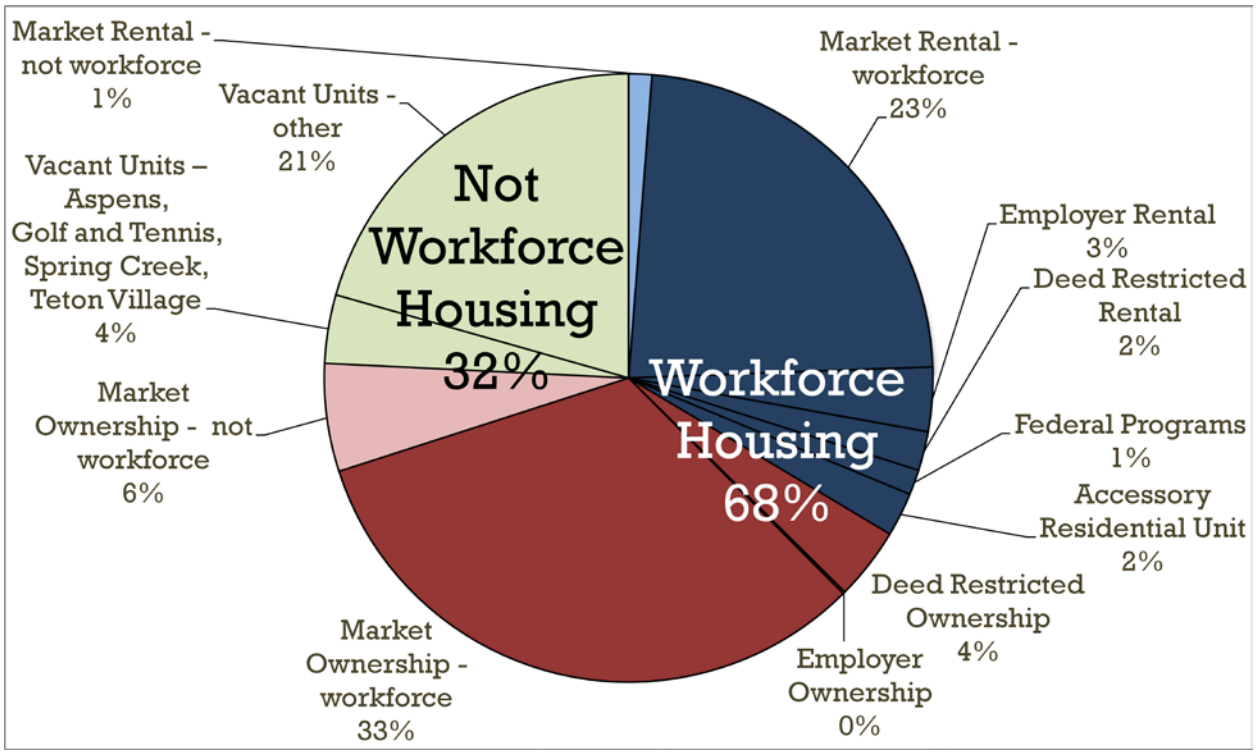
12. Affordability of Housing

In 2012 the **median home sale was 944% of median income**. Generally speaking a home that is 300% of income is considered affordable. This means that the median home sold in 2012 was only affordable to a family making over 3 times the median income. The trend over the past ten years shows that the affordability of housing did improve with the burst of the housing bubble. However, that improvement does not mean that housing is affordable. The question for 2013 will be whether the trend will continue to fall or weather the price of housing will again begin to outpace the increase in median income.



13. Workforce Housing Stock

The most recent workforce housing stock estimate we have is from 2009. This estimate should be updated based on 2010 Census data and 2012 Employer Survey data. However that analysis has not been done at this time. As additional American Community Survey information is made available by the Census Bureau such as data on commuting and whether householders are retired, Teton County Housing Authority will be able to further refine future estimates. The 2009 estimate is below.



14. Jobs, Housing Balance

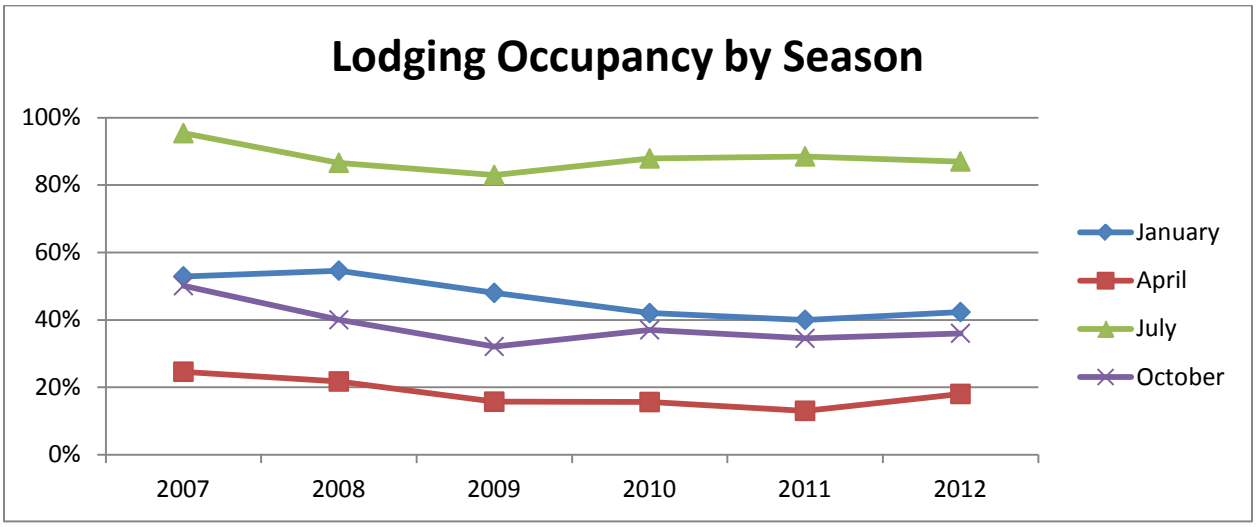
At this time staff has not compiled jobs or employment data. That data will be added to the report once it is compiled.

15. Lodging Occupancy by Season

The Jackson Hole Chamber of Commerce tracks reservations from its lodging members on a monthly basis to project occupancy in various regions of the valley. These numbers do not necessarily represent actual occupancy because they do not account for no-shows or walk-ins. The Rocky Mountain Lodging Report looks at lodging throughout the region at provides numbers on actual occupancy for the entire County. The difference in the numbers might indicate that reservations are a better predictor of lodging occupancy in the winter when travel is more difficult than other seasons when travelers can be more flexible.

2012 Lodging Occupancy				
	January	April	July	October
Chamber				
Downtown	41%	19%	91%	38%
Outlying Jackson	26%	12%	87%	25%
Teton Village	55%	15%	82%	20%
Vacation Rentals	49%	8%	64%	15%
Parks/Moran	closed	closed	88%	40%
Chamber Total	43%	15%	84%	27%
Rocky Mountain Lodging Report				
	42%	18%	87%	36%

Looking at the 5 year trend in the Rocky Mountain Lodging Report data shows that peak summer occupancy seems to have rebounded and leveled from a dip in 2009, but it has not reached 2007 levels. Winter occupancy seems to have stopped decreasing, but has not rebounded. Fall occupancy fell more sharply than winter, but seems to be back to winter levels. Spring occupancy has remained the lowest and steadiest over the past 5 years.



16. Employment by Sector

At this time staff has not compiled jobs or employment data. That data will be added to the report once it is compiled.

17. Population Served by START

In 2012 **42% of dwelling units** and **68% of lodging units** were within a ¼ mile radius of a START bus stop. Historical data is not available to analyze how the 2012 START Bus service compares to past years.

18. Percentage of Transportation Network "Complete Streets"

A "Complete Street" is a corridor that is safely accommodates all modes of travel. As part of the Character District exercise in 2011 Jackson Hole Community Pathways reviewed the State Highways, County Roads and Town Roads to identify which road corridors (including separated pathways if applicable) were safe for all modes. For the purposes of this analysis roads in Grand Teton National Park were included as highways, however roads in Yellowstone were not.

2012 Street "Completeness"		
	Total Mileage	**% Complete**
State/Park Hwy	147	25%
County Road	159	11%
Town Road	36	11%

In addition, there are 357 miles of private roads in the County that were not analyzed. There are different ways to achieve a complete street and the requirements depend on the context so some of

these private roads may safely accommodate all roads of travel as well. Historic data is not available to analyze trends in improvement of the "completeness" of the street network.

19. Level of Service

While the Town and County continue to transition toward budgeting that is based on level of service, a standard metric for defining level of service by service and monitoring the change over time has not yet been developed.