



# JOINT PLANNING COMMISSION MEETING TOWN OF JACKSON & TETON COUNTY AGENDA DOCUMENTATION

**PREPARATION DATE:** March 16, 2020  
**MEETING DATE:** March 23, 2020

**SUBMITTING DEPARTMENT:** Long-Range Planning  
**DEPT DIRECTORS:** Tyler Sinclair & Chris Neubecker  
**PRESENTER:** Kristi Malone

**SUBJECT:** 2020 Annual Indicator Report and Fiscal Year 2021 Implementation Work Plan  
(MSC2020-0005)

## PURPOSE/REQUESTED ACTION

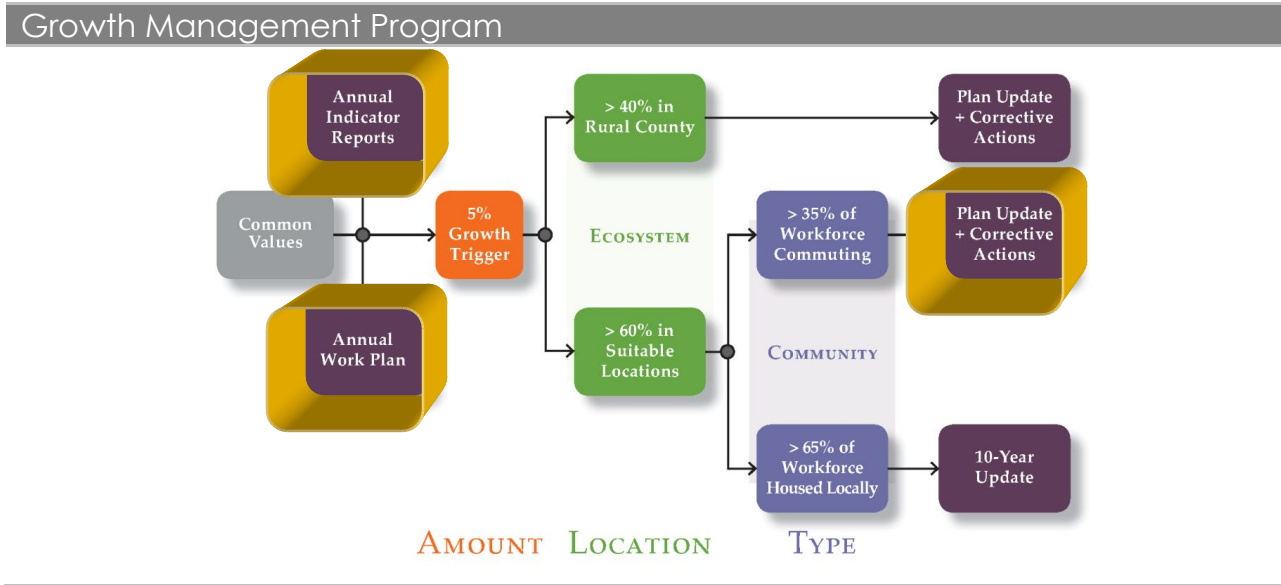
This item will be broken up into two tasks to be addressed over the course of two joint Planning Commission meetings:

1. March 23, 2020 meeting: Commissioners should review the 2020 Indicator Report and come prepared to ask questions and discuss the report in the context of setting the Work Plan for Fiscal Year 2021. No recommendation is required at this time.
2. April 27, 2020 meeting: Commissioners should review the proposed Work Plan and make recommendations that include changes or amendments proposed by the Commissions based upon review of the Indicator Report, the Growth Management Program Review and 2020 Comprehensive Plan Update, and Commission priorities for the upcoming fiscal year. Each Planning Commission's recommendation should focus on prioritizing specific LDR Update and Comprehensive Plan Administration tasks for the coming fiscal year (July 2020-June 2021) and beyond.

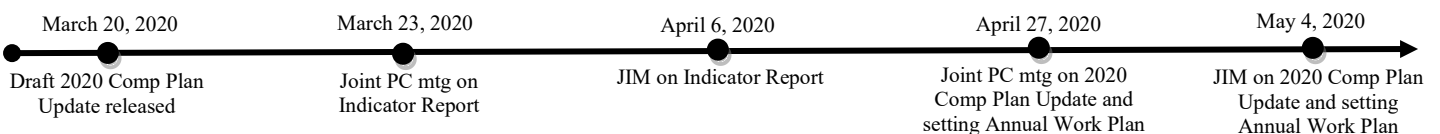
Based on feedback from the community, discussion of the Fiscal Year 2021 Work Plan (FY21) will be continued to the April 27<sup>th</sup> 2020 joint Planning Commission meeting to capture the value of including the ongoing Growth Management Program review and Comprehensive Plan Update in the Work Plan recommendation. Reasonably, if the Growth Management Program review and Comprehensive Plan Update results in new or amended strategies to achieve our Comprehensive Plan goals, setting of the Work Plan for the coming fiscal year should allow for consideration and incorporation of those strategies. Since this item spans two meetings to include both the Indicator Report and Work Plan, your motion for this meeting will just be to continue the item to the April 27, 2020 joint PC meeting so that a FY21 Work Plan recommendation can be made.

## BACKGROUND

The Annual Indicator Report and Work Plan operate in conjunction with the Growth Management Program to adaptively implement the Comprehensive Plan. The Annual Indicator Report facilitates evidence-based planning and consistent data trend records as our community seeks to achieve the Comprehensive Plan Vision. It informs the scope and prioritization of the projects in the Annual Work Plan. The Work Plan identifies and prioritizes the Comprehensive Plan implementation efforts to be undertaken in the next fiscal year. The Work Plan includes Teton County projects, Town of Jackson projects, and projects that will be carried out jointly by both jurisdictions.



In addition to the Indicator Report informing prioritization of Work Plan tasks as it does every year, we are also nearing completion of our first Comprehensive Plan Update triggered by the Growth Management Program. The Growth Management Program is a quantitative review structure that provides the measurability and accountability needed to ensure the community will achieve the Comprehensive Plan Vision. The Growth Management Program (GMP) is made up of four parts: a trigger (amount of residential growth), two targets (location and type of growth), corrective actions, and a 10-year regular Plan update. Referencing the chart above, the Annual Indicator Report and Work Plan occur every year as a basis for evaluating and implementing the Comprehensive Plan's Common Values. In 2017, when our community reached the 5% growth trigger that sent us into evaluation of the location and type of growth metric targets, we confirmed that greater than 35% of our local workforce are commuting from outside of the community which required a Comp Plan Update to address corrective action. That GMP Review and Comp Plan Update began last year and is nearing completion as a draft of recommended updates is being prepared for review and adoption. The anticipated timeline for coordination between the Annual Indicator Report, Annual Work Plan and completion of the GMP Review/Comp Plan Update is below:



## STAFF ANALYSIS

**Purpose:** The purpose of this item is to review the data and analysis presented in the 2020 Indicator Report. At the April 27, 2020 joint Planning Commission meeting you will provide input from the Planning Commissions concerning recommendations and priorities for LDR Updates and Comprehensive Plan Administration projects for fiscal year 2021. The recommendations of the Town and County Planning Commission will then be forwarded to the Town Council and Board of County Commissioners when they set the Work Plan for FY21. A FY21 Work Plan proposed by Staff will be made available in packet materials prior to the April 27, 2020 meeting.

**Scope:** The 2020 Annual Indicator Report compiles data available as of January 2020 to provide trend analysis of the 20 indicators related to the 3 Common Values of Community Character outlined in the Comprehensive Plan.

**Recommendation:** None; the 2020 Indicator Report is meant for presentation of data analysis, discussion, and reflection. A recommendation from Staff will come at the time of the Work Plan discussion at the April 27, 2020 meeting.

### ATTACHMENTS

- 2020 Annual Indicator Report

### STAKEHOLDER ANALYSIS

The entire Town of Jackson/Teton County community is a stakeholder and staff invites feedback from any community member or organization.

### PUBLIC COMMENT

No public comment has been received by Planning Staff up to the date this staff report was released.

### FISCAL IMPACT

Not applicable.

### STAFF IMPACT

Not applicable.

### LEGAL REVIEW

Graham.

### SUGGESTED MOTIONS

**Town Planning Commission:** I move that the Town of Jackson Planning Commission continue this item to the April 27, 2020 joint Planning Commission meeting where a recommendation on the Fiscal Year 2021 Implementation Work Plan will be made.

**County Planning Commission:** I move that the Teton County Planning Commission continue this item to the April 27, 2020 joint Planning Commission meeting where a recommendation on the Fiscal Year 2021 Implementation Work Plan will be made.



# 2020 Annual Indicator Report

March 16, 2020

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The Jackson/Teton County Comprehensive Plan, adopted in 2012, sets a community vision based on 3 Common Values of Community Character: Ecosystem Stewardship, Growth Management, and Quality of Life. It also establishes an adaptive management program that requires the community to regularly ask: are we living our values?

An Indicator Report is produced every year as a check-in on the community’s progress toward achieving our Vision. Through the annual presentation and analysis of 20 indicators tied to our Common Values, we can better understand how we are measuring up to Comprehensive Plan goals and inform annual Work Plans to direct progress where it is most needed.

This report begins with Planning Staff’s overall perspective on the data analyzed. Next, each of the three Common Values is assessed by analyzing its associated indicator data. Each section concludes with suggestions for next steps to improve our performance in each Common Value.

## Are We Living Our Values?

The 2020 Indicator Report is unique in that it is being released at the same time the community is finalizing its first Growth Management Program (GMP) Review and Comprehensive Plan Update. As part of this project, in October 2019 the Town of Jackson and Teton County released a detailed analysis of the community’s implementation of the Comprehensive Plan from 2012 to 2019 entitled, “The Comp Plan Seven Years Later: Are We on Track?” Since release of that analysis, the community has been developing and considering Comprehensive Plan updates to address the trends identified in that analysis. In continuity with that effort, the trends and discussion in this report echo the key trends identified in the October 2019 analysis.

**Greenhouse Gas Emissions are Increasing.** Climate change is one of the major threats to the health of our ecosystem and our quality of life. Our greenhouse gas emissions contribute to climate change and have increased 17% since 2008. This growth rate is less than our effective population growth rate but does not support our goal of reducing emissions community-wide. Travel and home energy consumption choices are some of the day-to-day things we can change to reduce emissions. Other goals, like housing the workforce locally, will also limit travel-related emissions.

**Demand for Housing Continues.** Regarding workforce housing, the community both acknowledges progress made and identifies increasing housing options as the most needed action in the community. Continued 3.4% annual job growth and the reduction in number of workforce units as locals retire mean housing that is affordable to a local wage-earner remains in high demand. Public sentiment is that the Town and County do not need to invent new

## The Community in 5 Trends

Since Comp Plan Adoption in 2012:

- Greenhouse gas emissions grew 17% from 2008 to 2019
- In 2019 the community added 218 residential units (3<sup>rd</sup> highest growth year since 2002), 62 of which are deed restricted rentals
- Yet, the percentage of the workforce living locally remains in slow decline (57% to 56% since 2017)
- Since 2012 the median market home sale price has grown at an annual rate of 7.9% while median income has only grown at 0.9%
- 65% of new residential units built in 2019 are in Complete Neighborhoods (with 58% located in Town), bringing the total since 2012 up to 61% of new units in Complete Neighborhoods

tools—they just need to direct resources toward using the tools that exist. That sentiment is embodied in the recent trends showing housing opportunities produced under new Town zoning at a rate that hasn’t been seen since the early 2000s. Also, analysis shows that the Town workforce housing bonus tool currently in place allows for 5-times more units than could ever be permitted under the community’s growth cap. The zoning and tools we have in place provide market flexibility, guarantee that 1/3 to 1/2 of additional units will be workforce restricted, and locate those units in Town to utilize existing infrastructure. The next step is removing barriers and catalyzing development in existing high-density zones through impact infrastructure investment and support for projects that utilize housing incentives.

**Inequality is Increasing.** Another concern identified by the data analysis and public outreach efforts in October 2019 is the growing inequality in the community. The indicator trend illustrating this is the increasing cost of housing relative to median income. The October 2019 analysis identified that, while median income is only growing 0.9% annually, average income is growing 2.7% annually—which suggests that income disparity is increasing. We have long been a relatively wealthy community. However, inequality issues beyond housing cost (which is a foundational issue) are rising in the public consciousness. The next step to address these issues is defining the community’s equity and inclusion ethic in the Comprehensive Plan as a foundation for action.

**Development Pattern Success.** Another threat to ecosystem health is the development and fragmentation of wildlife habitat—which is why the community has committed to directing development into areas of existing disturbance and infrastructure instead of relying on development of open space. Our greatest success since 2012 has been in achieving that direction. Since 2012 only 39% of new residential units have been built in rural areas, meeting the community target of less than 40%. The outlook is strong as well. Prior to 2015, 65% of future residential units were slated to be built in areas of priority habitat, scenery, and open space; today that number is only 38%. Such a shift in actual construction and potential future construction is a policy success that many communities throughout the west strive to achieve. This conservation and ecosystem stewardship achievement adds to our community’s long list of such achievements.

A component of the GMP review and Comprehensive Plan update will be adoption of some new indicators, but this database of information that has been built over the past seven years will remain invaluable in both tracking and guiding the community’s continued implementation of the Comprehensive Plan. This Indicator Report adds 2019 data and analysis to our database. However, in cases where 2019 data for indicators is not available, it is noted in the indicator graphs in this report.

## Common Value 1: Ecosystem Stewardship

Preserving and protecting the area’s ecosystem is the core of our community character. Monitoring our impacts on the ecosystem annually is an important way to ensure our growth does not compromise the health of the ecosystem. These indicators are intended to help us monitor whether we are growing as a community in a way that still preserves the abundant wildlife, quality of natural resources and scenery, open space, and climate long into the future.

- Location of Growth
- Permanently Conserved Land
- Energy Load
- Wildlife Vehicle Collisions

### 2018 Ecosystem Stewardship Takeaways

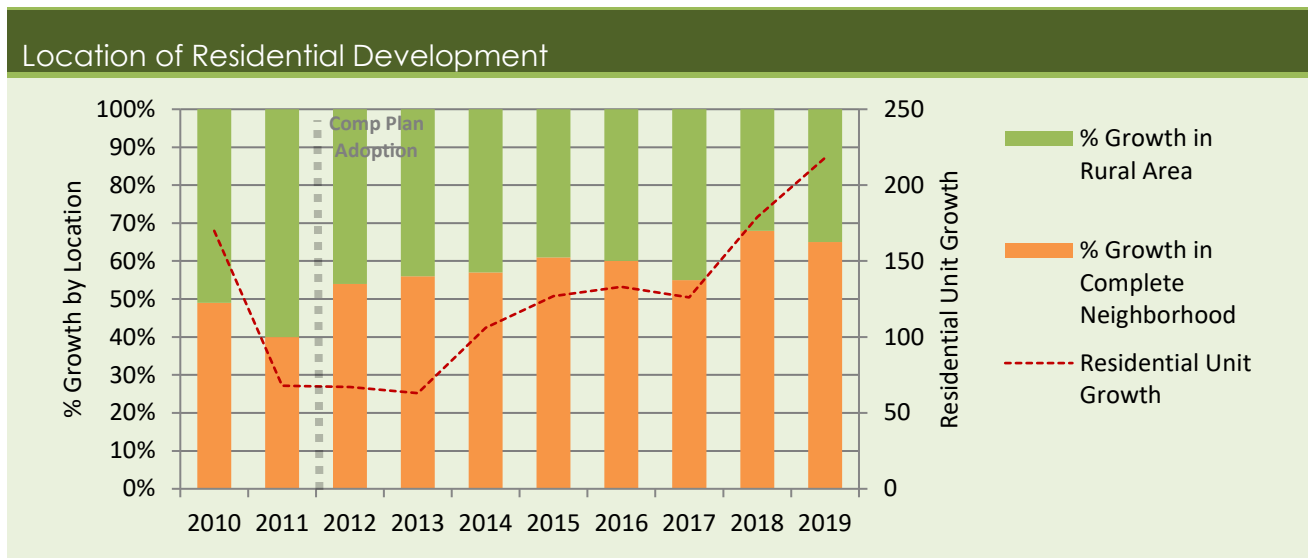
- 65% of residential units built in 2019 were in Complete Neighborhoods. 58% of 2019 units were built in Town, a single-year high going back to 2002. Since 2012, 61% of new units have been built in Complete Neighborhoods, exceeding our Comprehensive Plan target of 60% of growth occurring in previously developed areas.

- The 218 units built in 2019 is the 3<sup>rd</sup> highest annual growth number since 2002 (257 in 2006, 321 in 2004). The limiting factor in the number of units built is the construction labor force (as evident by rising construction cost). When we build multifamily housing the same construction labor force can build more units that meet our growth location goals and tend to be more affordable.
- 62% of future residential growth can be expected in Complete Neighborhoods. This is a significant accomplishment in the long-term success of the Comprehensive Plan.
- 2019 was a slow year for added conservation areas, but not because land was being subdivided and developed instead. Since 2012, growth in acres of land under conservation has been growing almost as fast (0.9% per year) as residential development (1.2% per year); and as identified above, the residential development is happening in Complete Neighborhoods not rural areas.
- Emissions from electricity have gone down due to decreases in consumption and increases in the renewable sources in Lower Valley Energy’s (LVE) portfolio. Unfortunately, those decreases were offset by increases in natural gas consumption and travel emissions. Future indicator reports will estimate overall greenhouse gas emissions based on the methodology of the 2009 and 2019 Jackson Hole Inventory of Greenhouse Gas Emissions (Heede; September 8, 2019).
- Wildlife Vehicle Collisions (WVC) are trending up, but at a slower rate than vehicle miles traveled. WVC are also highly correlated with snowfall. It will be important to continue to monitor WVC to measure the impact of implementation of the Wildlife Crossings Master Plan.

### Ecosystem Stewardship Indicators

#### Location of Growth (Goal: ≥ 60% in Complete Neighborhoods)

Locating growth in Complete Neighborhoods indicates the community’s ability to direct growth out of areas of habitat, scenery, and open space and into areas of infrastructure, amenities, and vitality. Location of Growth is the primary target established in the Comprehensive Plan at this time to indicate Ecosystem Stewardship. The goal is for at least 60% of growth to occur in Complete Neighborhoods.



Source: Teton County and Town of Jackson Building Permits

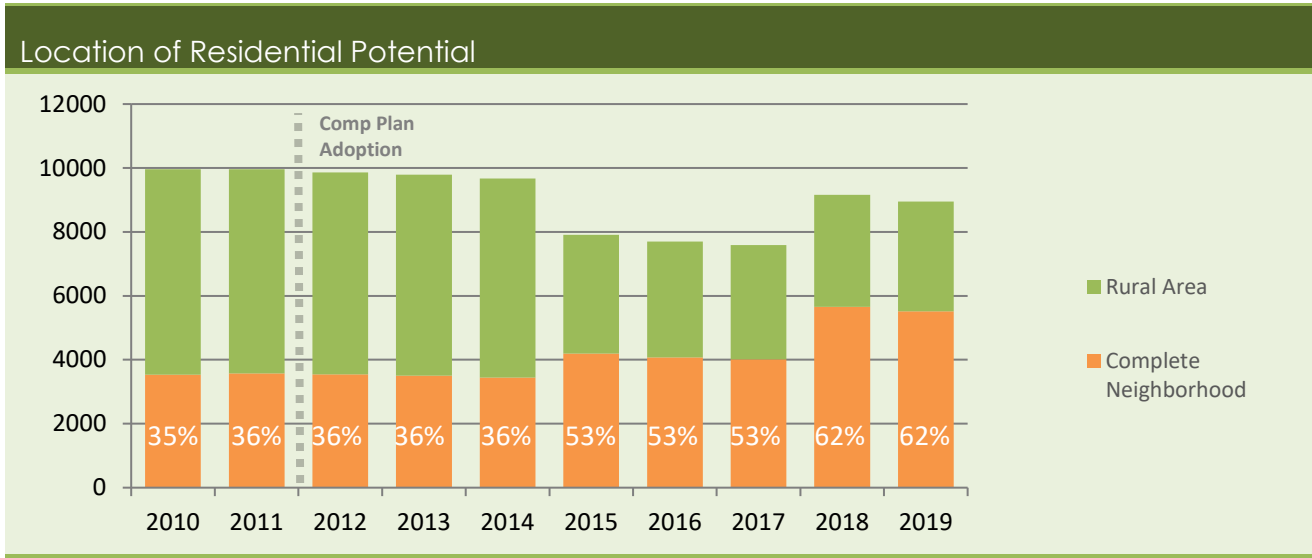


The location of growth *potential* (defined as buildout minus what is already built) projects where future growth will occur, rather than past development patterns. Growth potential decreases as units are built. Potential is also impacted if buildout allowance is increased or decreased. The way to shift the location of growth potential is to reduce buildout in one area and increase it in another.

**Definition of Potential**

Potential = Buildout - Built

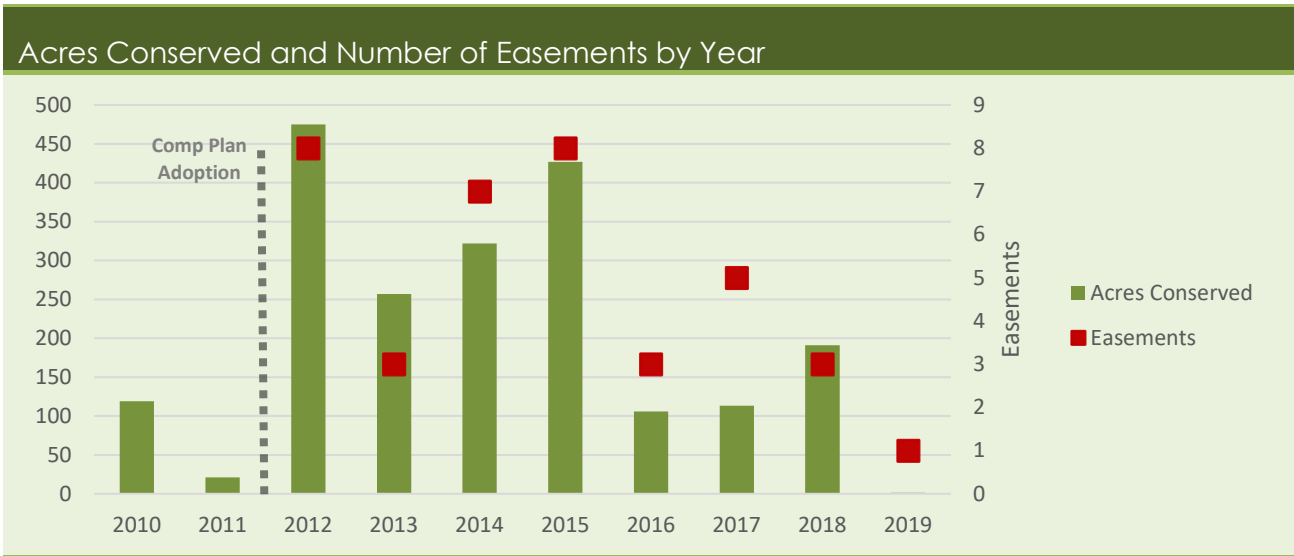
*(LDRs applied to all parcels as if vacant)*      *(What is actually on the ground)*



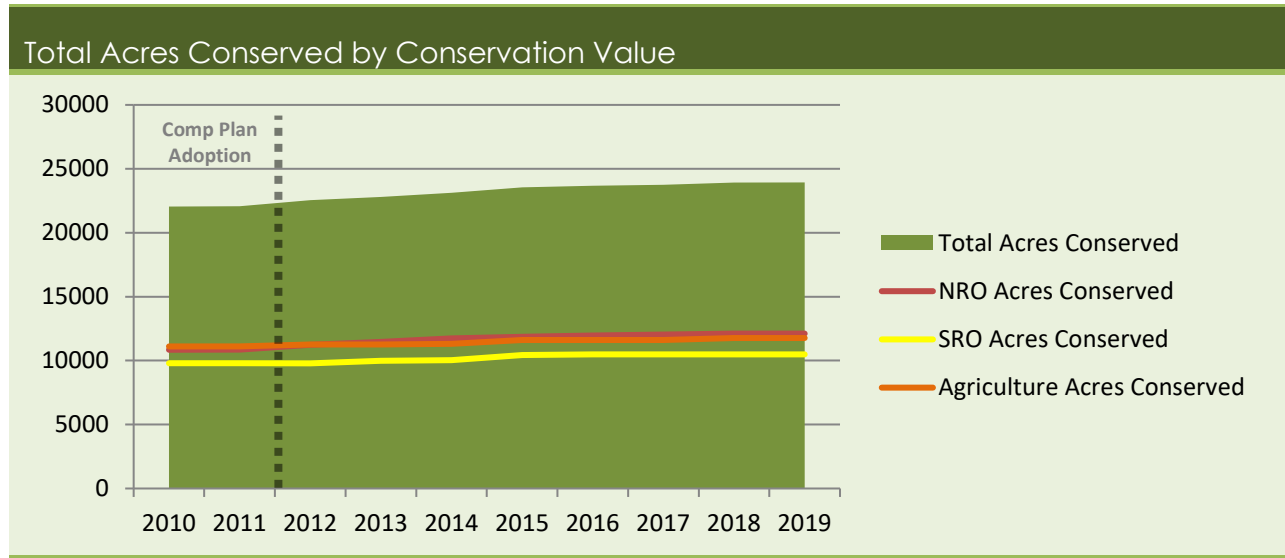
Source: Teton County and Town of Jackson

### Permanently Conserved Land (Goal: Increase)

Monitoring permanently conserved land is an indicator of the community’s progress in preserving areas of wildlife habitat, natural resources, scenic resources, and agricultural character. The goal of the Comprehensive Plan is to increase such conservation, although no specific conservation targets are identified.



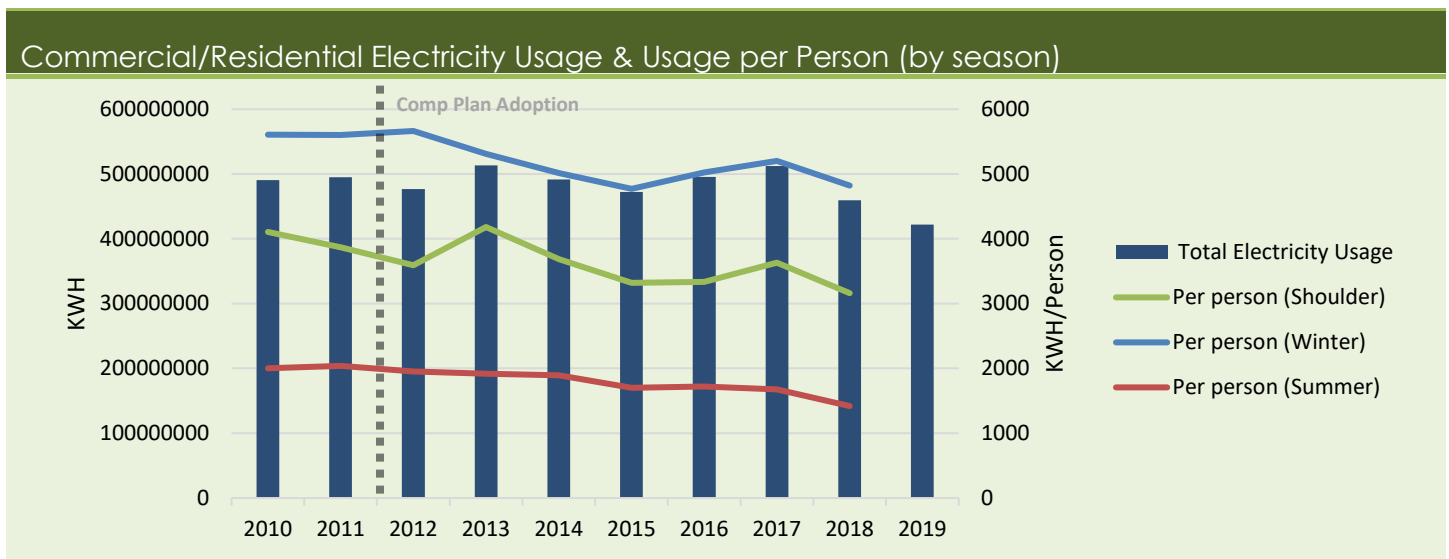
Source: Teton County; Jackson Hole Land Trust; Teton Regional Land Trust



Source: Teton County; Jackson Hole Land Trust

### Energy Load (Goal: Maintain)

Energy Load measures the electricity used annually in Teton County. The Comprehensive Plan establishes an objective to maintain the community's overall energy load at the 2011 level even as we grow in population.

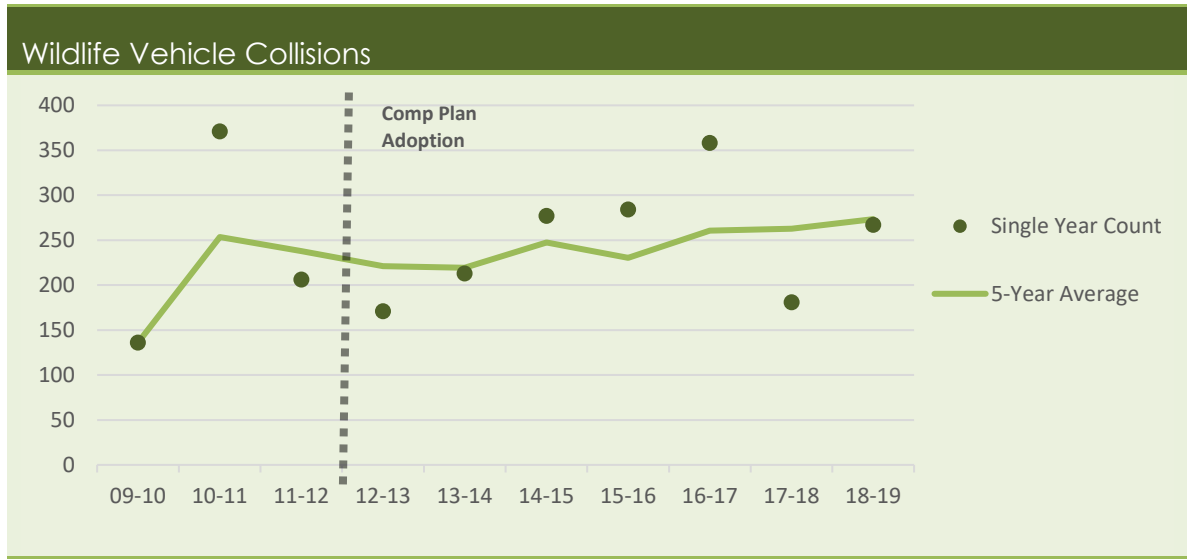


Source: Lower Valley Energy



### Wildlife Vehicle Collisions (Goal: Decrease)

Wildlife vehicle collisions are an indicator measuring the impacts of physical development and transportation growth on wildlife movement. It is also a measurement of the community’s ability to provide safe wildlife crossings. The WVC Indicator follows the biological year (May through April) rather than the calendar year. This better captures the effects of weather patterns on wildlife.



Source: Jackson Hole Wildlife Foundation

### Ecosystem Stewardship Next Steps

The next steps in ecosystem stewardship are being identified through the GMP update to the Comprehensive Plan. A draft of the updated Comprehensive Plan will be released March 20, 2020. See also the proposed 2020 Work Plan for the steps that will be taken in the next year.

## Common Value 2: Growth Management

Responsible growth management means proactively planning for the community we want – with rural open spaces and high quality Complete Neighborhoods that enhance walkability and vitality. It also means proactively adapting to population growth in a way that preserves our community vision. The following indicators monitor types of development, our day-to-day population, whether we are achieving goals to keep buildout levels below 1994 buildout levels, and what initiatives are being undertaken to address growth in our community.

- Growth by Use
- Effective Population
- Buildout
- Comp Plan Implementation
- Redevelopment

### Growth Management Takeaways

- The 78 apartments built in 2019 marked the 2<sup>nd</sup> highest single year increase in apartments since 2002 (147 in 2004). It is notable that the years in which we build apartments are the years with the most units added and the highest percentage of units located in Complete Neighborhoods.
- The amount of institutional floor area continues to grow faster than the amount of commercial floor area. Institutional floor area growth continues to be largely a function of construction of schools and additions to the airport.
- The fastest growing commercial use (in terms of floor area) is industrial. Industrial use is adding the most floor area of any commercial use and growing the fastest relative to the previously existing floor area.

- Summer effective population appears to be plateauing. The effective population estimate methodology is due for an update. The current methodology is likely underestimating seasonal residents and overestimating shoulder season seasonal employees.
- There are still a lot of units (2,190) in the incentive pool. Eleven units (6 market, 5 workforce) were approved using the workforce housing bonus in 2019. This number is expected to be much higher in 2020 as there are several Housing Department and private development projects in the works that will utilize the Town’s workforce housing bonus.

### Growth Management Indicators

#### Amount of Growth by Use (Goal: Monitor | GMP Trigger: 5% Residential)

Growth by Use measures the different types of development occurring in Teton County. It illustrates, for example, whether the development that has occurred in the last several years has primarily consisted of residential unit growth, lodging unit growth, or non-residential floor area growth. Residential unit growth is particularly important in the Comprehensive Plan. 5% growth in residential units from adoption of the Comprehensive Plan triggers the Growth Management Program—which our community triggered in 2017 and which is why we are currently engaged in a Growth Management Program and Comprehensive Plan Update.

Growth by Use					
Use	2019 Growth	Growth Since 1/1/12		10-Year Growth	
		Amount	%	Amount	%
<b>Non-Residential Floor Area</b>					
Agriculture	2,520	8,058	0.8%	9,066	1%
Outdoor Recreation	4,233	34,601	10.2%	37,235	11%
Restaurant/Bar	547	38,241	9.4%	46,793	12%
Office	18,066	65,148	5.1%	82,786	7%
Retail	-2,945	76,221	4.8%	81,241	5%
Industrial	32,115	141,586	10.0%	155,332	11%
Institutional	63,676	234,205	12.1%	330,483	18%
<b>Non-Residential Floor Area</b>	<b>118,212</b>	<b>598,060</b>	<b>7.5%</b>	<b>742,932</b>	<b>10%</b>
<b>Residential Units</b>					
Agriculture	0	2	0.9%	2	1%
Detached Single Family Dwelling	103	632	10.7%	773	13%
Attached Single Family Dwelling	37	152	8.2%	231	13%
Apartment	78	233	15.1%	251	16%
Mobile Home	0	0	0.0%	0	0%
<b>Residential Units</b>	<b>218</b>	<b>1,019</b>	<b>10.3%</b>	<b>1,257</b>	<b>13%</b>
Guesthouse	38	169	22.3%	210	29%
<b>Lodging Units</b>					
Conventional Lodging Units	3	322	5.5%	358	6%
<b>Lodging Units</b>	<b>3</b>	<b>322</b>	<b>5.5%</b>	<b>358</b>	<b>6%</b>

Source: Teton County and Town of Jackson

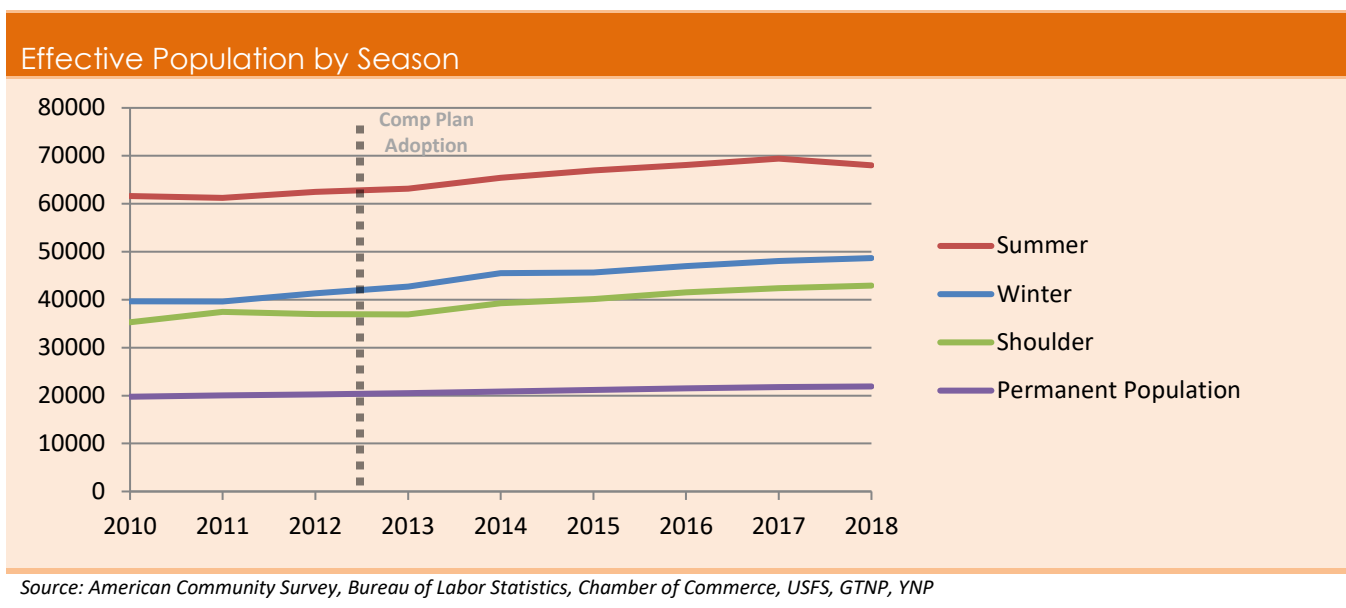
#### Effective Population (Goal: Monitor)

Effective population indicates the true, day-to-day number of people in Teton County, considering not only permanent residents, but also commuters, seasonal residents, seasonal workers, and visitors. Effective

population is an important indicator to monitor because it more accurately represents the number of people who are impacting community facilities and resources in Teton County, and is the number used when calculating per capita energy use and START ridership.

2018 Effective Population			
	Summer	Winter	Shoulder
Permanent Residents	21,906	21,906	21,906
Daily Commuters	7,863	7,863	7,863
Seasonal Residents	3,890	2,646	1,465
Seasonal Workers	12,231	6,854	5,947
Visitors	22,118	9,407	5,756
<b>Effective Population</b>	<b>68,007</b>	<b>48,677</b>	<b>42,936</b>

*Source: American Community Survey, Bureau of Labor Statistics, Chamber of Commerce, USFS, GTNP, YNP*



### Buildout (Goal: <1994 Levels)

Buildout measures the change in the maximum amount of development permitted on a property. Change in buildout is determined by:

- Changes to Jackson/Teton County zoning regulations;
- Conservation easements and other deed restrictions on the development of a property;
- Transfers of property ownership from a private party to federal ownership and vice versa; and
- Use of the Workforce Housing Bonus (2-for-1 Bonus) and Planned Residential Development (PRD) incentives.

In order to maximize use of the incentives, units produced using incentive tools only get counted as an increase in buildout upon project approval. The last row of the table is the number of units that are available for future use of the incentives. The incentives cannot be used if their use would make the last row greater than zero.

Changes in Buildout			
Year	Residential Units	Lodging Units	Nonresidential Floor Area
1994-2011	-564	?	?
2012	-31	0	0
2013	-12	0	0
2014	-14	0	0
2015	-2,201	0	0
2016	-76	89	94,379
2017	13	0	-30,651
2018	127	0	30,099
2019	4	-22	-9,339
2012-2019	-2190	67	84,489

*Source: Teton County and Town of Jackson*

### Annual Comprehensive Plan Monitoring and Implementation (Goal: Complete)

Annual monitoring and implementation of the Comprehensive Plan is included as an indicator to ensure that adequate time and resources are being dedicated to Comprehensive Plan implementation. It also ensures the community is taking the time to monitor these indicators. Each year the Town and County adopt a Work Plan to allocate resources toward implementation of the Comprehensive Plan. Below is a review of all the tasks undertaken to implement the Comprehensive Plan since it was adopted in 2012.

Comprehensive Plan Implementation		
Task	Date Complete	Comp Plan Strategies Implemented
<b>Land Development Regulation Updates/Studies</b>		
Housing Nexus Study	October 2013	5.3.S.1
Vegetation Mapping	December 2013	1.1.S.1
Joint LDR Restructure	December 2014	3.3.S.2, 3.3.S.3
County Rural LDRs Updates	December 2015	1.4.S.1, 1.4.S.2, 1.4.S.3, 3.1.S.1, 3.1.S.2, 3.3.S.2, 3.3.S.3
Town District 2 and LO Zoning	November 2016	4.1.S.1, 4.2.S.2, 4.2.S.4, 4.2.S.6, 4.4.S.3, 4.4.S.4
Focal Species Study	April 2017	1.1.S.2
Nonconformities LDRs Cleanup	May 2016	3.3.S.2, 3.3.S.3
County Nuisance LDRs	July 2016	3.1.S.1, 3.2.S.2
Town Adult Entertainment LDRs	March 2017	3.2.S.1
Exterior Lighting LDRs Update	September 2016	1.3.S.2
Town ARU Allowance	November 2016	5.2.S.2
Wildland Urban Interface LDRs	December 2016	3.4.S.2, 3.4.S.3
2016 LDR Cleanup	January 2017	3.3.S.2, 3.3.S.3
Housing Mitigation LDRs	July 2018	5.1.S.1, 5.2.S.2, 5.3.S.2, 5.4.S.3, 5.4.S.4
Town District 3-6 Zoning	July 2018	4.1.S.1, 4.1.S.2, 4.2.S.4, 4.3.S.1, 4.4.S.3, 5.2.S.1, 5.4.S.3, 5.4.S.4
County Natural Resource LDRs	75% complete	1.1.S.3, 1.1.S.4, 1.1.S.5, 1.1.S.6, 1.1.S.7, 1.2.S.1, 1.2.S.2
Joint Comprehensive Plan Review (GMP)	90% complete	Policy 9.1.a and 9.1.d
LDR Cleanup	75% complete	3.3.S.2, 3.3.S.3

## Comprehensive Plan Implementation

Task	Date Complete	Comp Plan Strategies Implemented
<b>Comprehensive Plan Administration</b>		
2012 Work Plan	June 2012	Principle 9.2
2013 Indicator Report & Work Plan	May 2013	Principle 9.2
Standardize Data Collection	70% complete	Policy 9.2.a
2014 Indicator Report & Work Plan	May 2014	Principle 9.2
2015 Indicator Report & Work Plan	August 2015	Principle 9.2
2016 Indicator Report & Work Plan	April 2016	Principle 9.2
2017 Indicator Report & Work Plan	April 2017	Principle 9.2
2018 Indicator Report & Work Plan	April 2018	Principle 9.2
2019 Indicator Report & Work Plan	April 2019	Principle 9.2
Joint Comprehensive Plan Review (GMP)	90% complete	Policy 9.1.a and 9.1.d
Joint Public Engagement	Continuous	3.3.S.1
Other Coordination	Continuous	
<b>Integrated Transportation Plan (ITP) Implementation</b>		
ITP	September 2015	7.1.S.1, 7.1.S.4, 7.1.S.6, 7.1.S.8, 7.1.S.9
Town Community Streets Plan	April 2015	7.2.S.1
Town District 3-6 Parking Study	December 2017	4.1.S.1, 4.1.S.2, 5.4.S.3, 7.3.S.1
Joint Regional Traffic Model	January 2019	7.2.S.6
Downtown Parking Study	July 2019	4.1.S.1, 4.1.S.2, 5.4.S.3, 7.3.S.1
ITP Update	75% complete	7.1.S.1, 7.1.S.4, 7.1.S.6, 7.1.S.8, 7.1.S.9
<b>Housing Action Plan Implementation</b>		
Housing Action Plan (HAP)	November 2015	5.4.S.1, 5.4.S.2
Housing Authority Restructure	December 2016	HAP: 1
2016 Housing Supply Plan	October 2016	HAP: 2
Housing Rules and Regulations	July 2018	HAP: 3B
2017 Housing Supply Plan	November 2017	HAP: 2
2018 Housing Stock Portfolio	75% complete	HAP: 2F
Online Intake Form	February 2018	HAP: 2F, 3C, 4B
2018 Housing Supply Plan	June 2018	HAP: 2
2019 Housing Supply Plan	April 2019	5.4.S.1
2020 Housing Supply Plan	January 2020	5.4.S.1
Update Nexxus Study	10% Complete	5.3.S.1

## Redevelopment vs. New Construction (Goal: Monitor)

Redevelopment vs. New Construction is an indicator intended to measure the balance between redevelopment of existing, developed sites and new construction on vacant sites. This indicator was intended as measure of whether redevelopment in Town and other Complete Neighborhoods is being achieved and for what purpose. However, a reliable methodology has not been developed and the GMP Review recommends replacing this indicator.

## Growth Management Next Steps

The next steps in growth management are being identified through the GMP update to the Comprehensive Plan. A draft of the updated Comprehensive Plan will be released March 20, 2020. See also the proposed 2020 Work Plan for the steps that will be taken in the next year.

## Common Value 3: Quality of Life

The first two Common Values of the Comprehensive Plan – Ecosystem Stewardship and Growth Management – work to protect the natural character and the physical character of the community. The third Common Value – Quality of Life – works to protect the emotional aspect of our character. We identify as a diverse community with many different lifestyles and employment opportunities. We value the ability for all residents to have access to a spectrum of employment opportunities, affordable housing, and safe, efficient transportation. The indicators below evaluate our progress towards achieving the Quality of Life vision outlined in the Comprehensive Plan.

- Local Workforce
- Housing Affordability
- Workforce Housing Stock
- Jobs, Housing Balance
- Lodging Occupancy
- Employment by Sector
- Vehicle Miles Traveled
- START Ridership
- Trips by Walk/Bike
- Level of Service

### Quality of Life Takeaways

- After 4 years (from 2014-2017) of 57% of the workforce living locally, the percentage dropped in 2018 to 56%. This decline was due to the continued 3.4% annual job growth that was not matched by equivalent growth in local workers. In the GMP review it was identified that the Housing Action Plan uses a different benchmark estimate of the local workforce than the indicator report. Using the Housing Action Plan benchmark the percentage of the workforce living locally is 60%. But, importantly, the trend is the same – jobs are growing faster than employees that live locally and therefore the percentage of the workforce living locally is declining. The Housing Nexus Study update to be completed in 2020 will identify an updated methodology for use in next year’s Indicator Report to alleviate the discrepancy so that we can produce a more robust and reliable methodology.
- The price of a single-family home (as reported by David Viehman in the 2019 Year End Hole Report) hit an all-time high relative to income in 2019 with the average sale price at \$2.62 million and the median sale price at \$1.74 million.
- The median price of all home sales (as reported by the Teton County Assessor) is approaching the all-time high relative to income that was achieved at the peak of the housing bubble in 2008.
- Jobs continue to grow far faster (3.4% annually) than housing units (1.2%), lodging units (0.7%), commercial floor area (0.9%), institutional floor area (1.4%). While the term “growth” tends to be synonymous with physical construction in the Comprehensive Plan and community conversation, the growth that is driving change in the community is less physical and more of an increasing demand for service—i.e. the type of growth we may feel more than we see.
- Job growth is also far outpacing wage growth – median income has only grown 0.9% annually.
- Vehicle Miles Traveled have grown overall and per capita. There will be spikes and regressions over the years, but if the trends continue, it does not bode well for the community’s emissions goal.
- The increase in traffic is being driven by increases in winter and shoulder season driving. This is consistent with increasing lodging occupancy and effective population in the winter and shoulder seasons.
- After years of START ridership increases correlating with effective population increases, there has been a notable increase in winter per capita START ridership. If the trend continues, we will get closer to the community’s transportation goals.



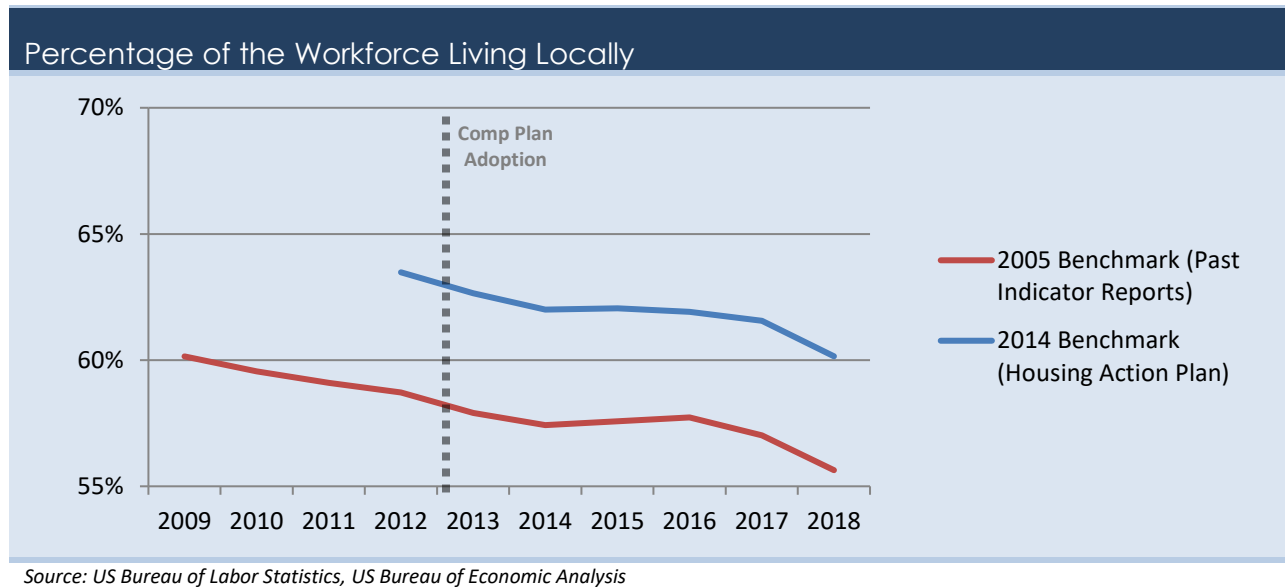
- The other good news in terms of the community’s mode shift goal away from single-occupancy vehicle travel is the continued increase in the number of trips made by walking or biking. This trend has shown consistent progress since 2012.

### Quality of Life Indicators

#### Local Workforce Percentage (Goal: ≥ 65%)

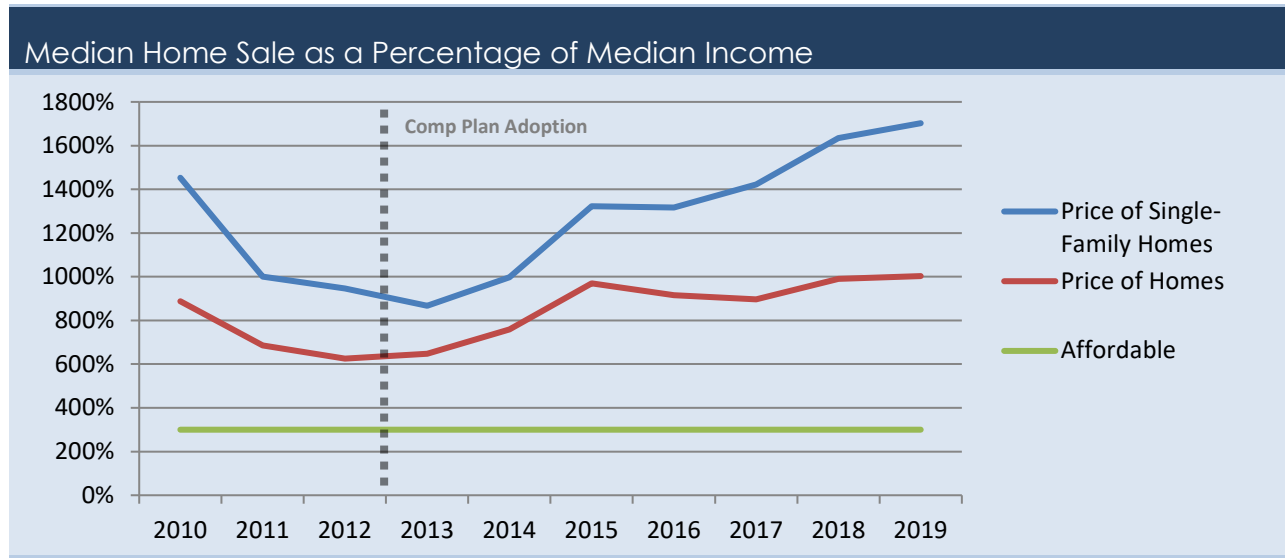
The Comprehensive Plan establishes a goal of ensuring at least 65% of the workforce lives locally to maintain the “community first, resort second” character of the valley. When the community identified loss of local workforce as an important issue in the early 90s, over 85% of the workforce lived locally. The percentage of the workforce living locally is the primary target for achieving the Quality of Life envisioned in the Comprehensive Plan.

In 2019 it was identified that the Housing Action Plan uses a different benchmark (2014 regional housing needs assessment) than the past indicator reports (2007 local housing needs assessment). The benchmark used does not affect the trend but does affect the reported percentage. The trend is based on the relationship between job growth and local worker growth. A “local worker” is defined as a member of our workforce that lives within the boundaries of Teton County, as opposed to a commuter from Alpine, Driggs or another neighboring community. Part of the purpose of the upcoming 2020 Housing Nexus Study is to rectify the benchmark discrepancy and make any necessary updates to the trend analysis. Next year’s indicator report will use the method identified in the 2020 Housing Nexus Study so that we can report a reliable single percentage.



#### Affordability of Housing (Goal: Monitor)

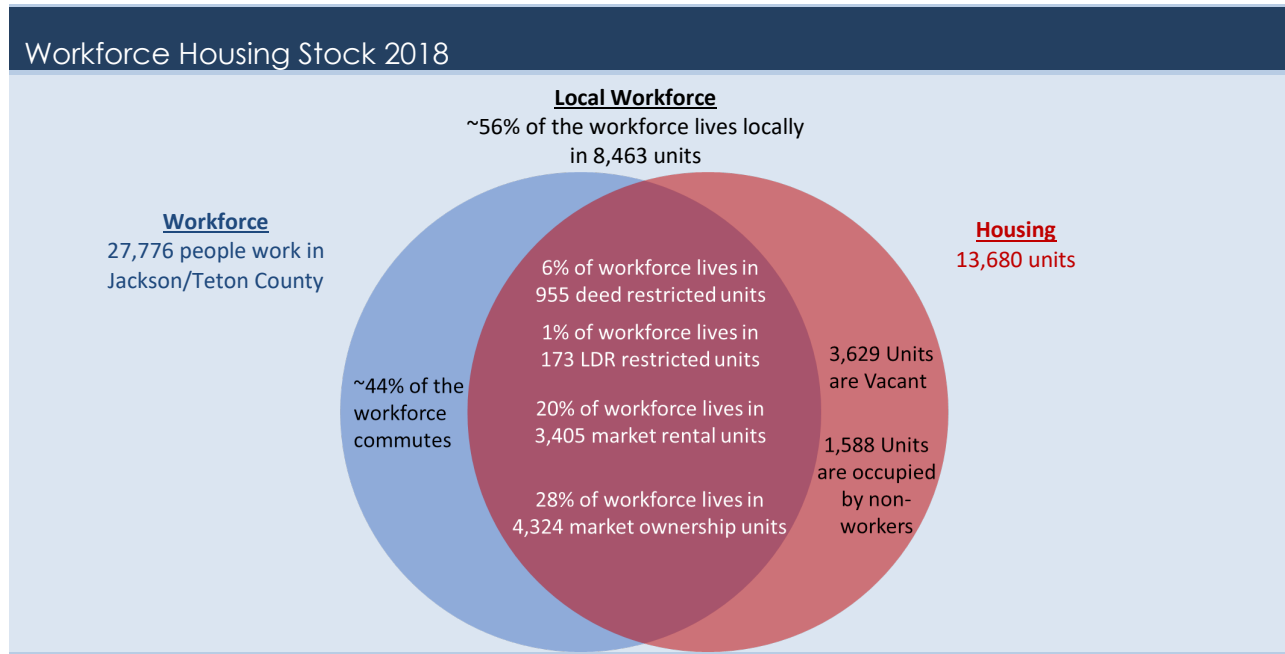
Housing affordability has long been considered a primary reason for the loss of the local workforce. The community monitors this indicator to understand the relationship between affordability and the number of workers living locally. A home sale that is no greater than 300% of income is considered affordable. In 2015, for example, that ratio means that the median home sold was only affordable to a family making more than three times the median income.



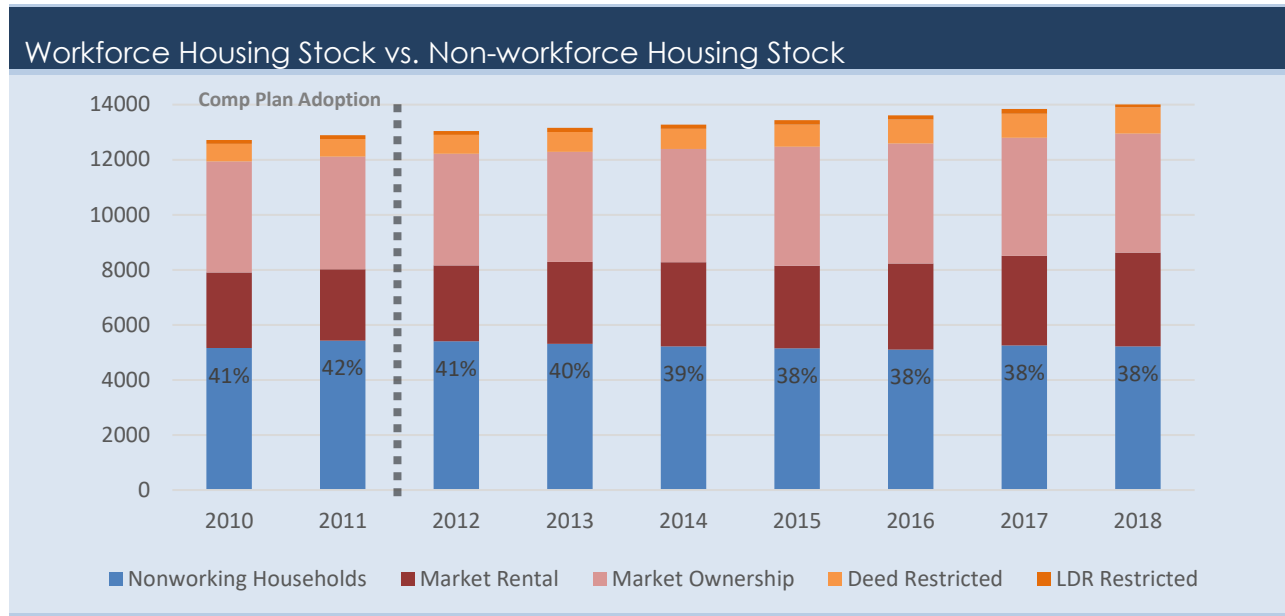
Sources: HUD, Teton County Assessor, David Viehman

## Workforce Housing Stock (Goal: Monitor)

Workforce Housing Stock measures the percentage of housing units that are occupied by the workforce. Given that housing affordability is one of the primary causes for loss of local workforce, it is important to understand the types of residential units that are occupied by the workforce in relation to the type of development that is being allowed and built.



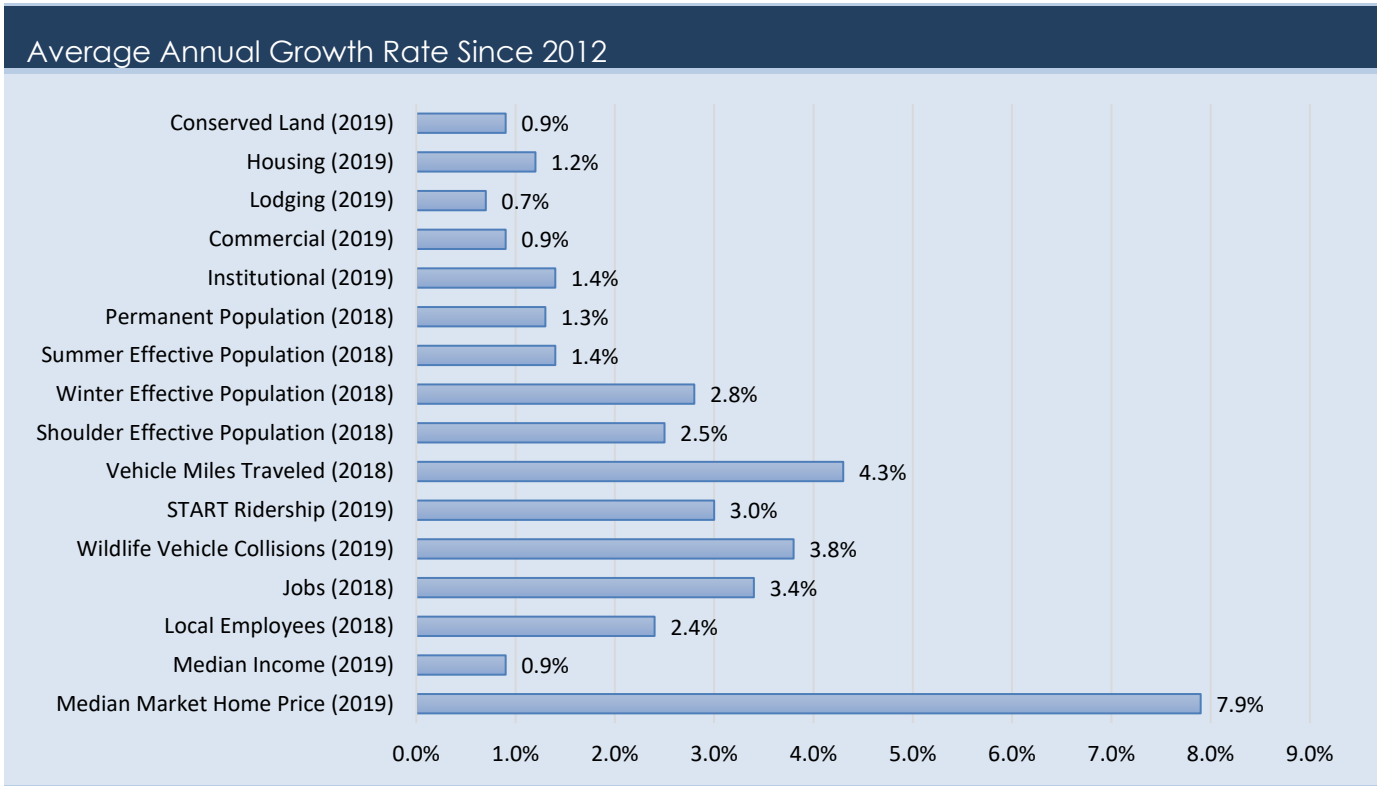
Sources: Bureau of Economic Analysis, assuming 1.2 jobs per person; 2015 5-Year American Community Survey, data adjusted to fit 2010 Decennial Census; Bureau of Economic Analysis, Bureau of Labor Statistics, 5-Year American Community Survey Selected Economic Characteristics



Sources: Teton County Housing Department, Teton Community Housing Trust, Habitat for Humanity, Bureau of Economic Analysis, 5-Year American Community Survey Selected Economic Characteristics

## Jobs, Housing Balance (Goal: Monitor)

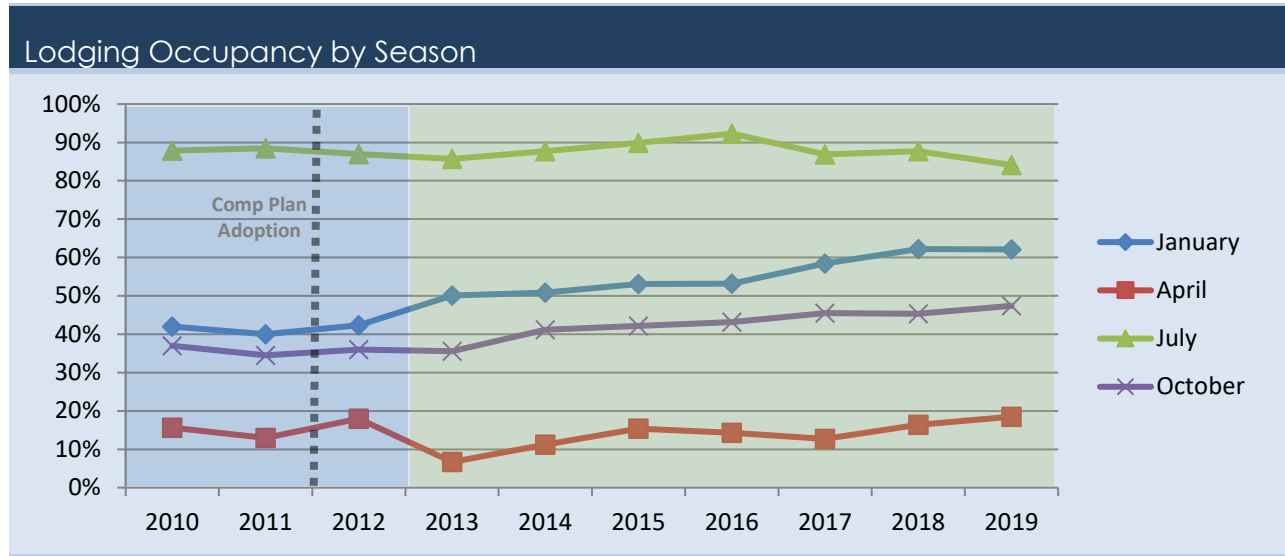
The Jobs, Housing Balance Indicator measures the relationship between various indicators. It is used to gain insight into how indicators are correlated with one another.



Source: Town of Jackson, Teton County, American Community Survey, US Bureau of Economic Analysis, US Bureau of Labor Statistics

### Lodging Occupancy by Season (Goal: Increase)

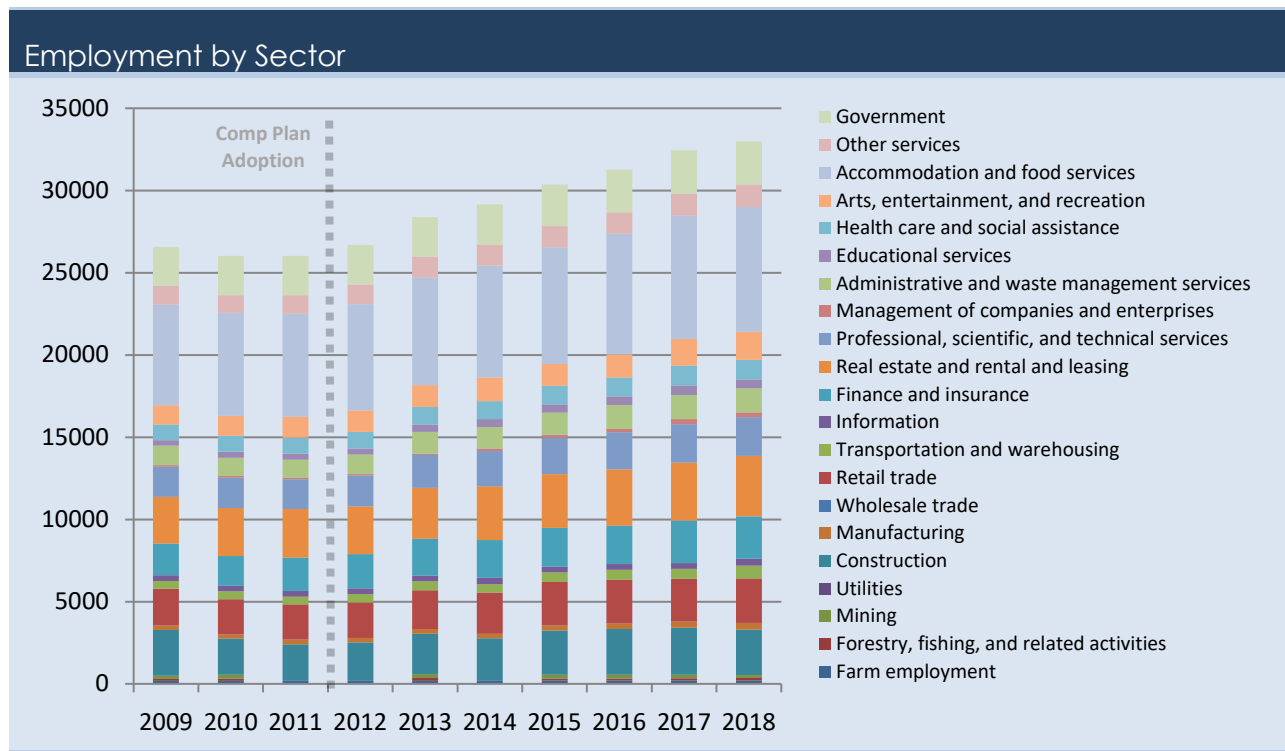
Lodging Occupancy by Season measures the percentage of lodging units that are occupied in Teton County. The Comprehensive Plan identifies a goal of improving shoulder season occupancy to utilize existing lodging capacity and increase economic activity.



Source: 2007-2012 Data from Rocky Mountain Lodging Report. 2013-2019 Data from the Jackson Hole Chamber of Commerce using improved methodological procedures.

### Employment by Sector (Goal: Monitor)

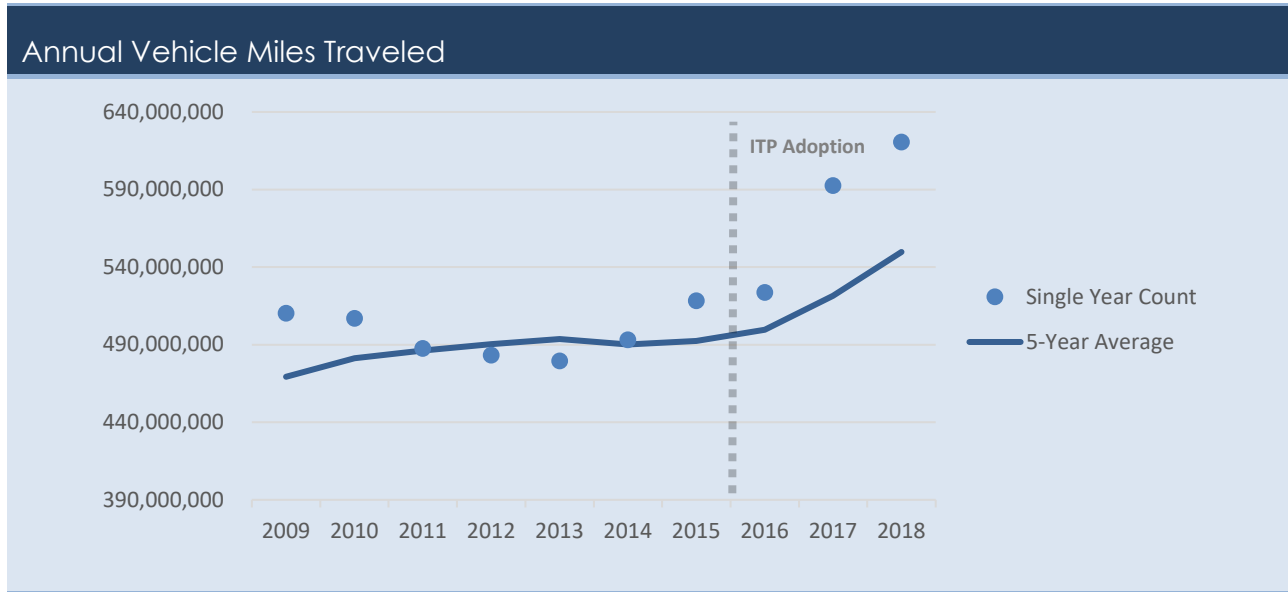
Employment by Sector measures the diversity of employment opportunities in the community. It shows not only when there were declines in employment opportunities (see years 2009-2010 in the chart below), but also shows variability in different employment sectors.



Source: US Bureau of Economic Analysis

### Vehicle Miles Traveled (Goal: ≤ 560,000,000 in 2035)

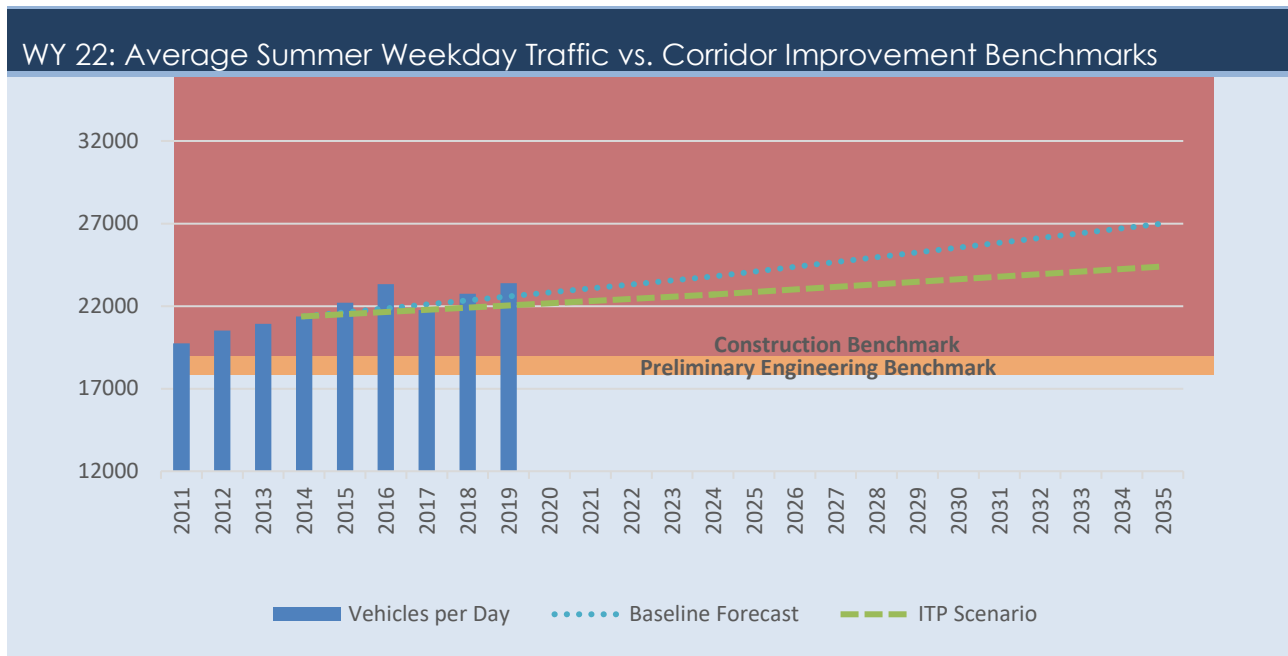
Vehicle miles traveled is a measurement of how many miles are driven within Teton County on an annual basis. It helps us understand if we are achieving Comprehensive Plan goals of meeting transportation demands through alternative transportation modes such as transit, cycling, and walking.



Sources: ITP Dashboard, WYDOT

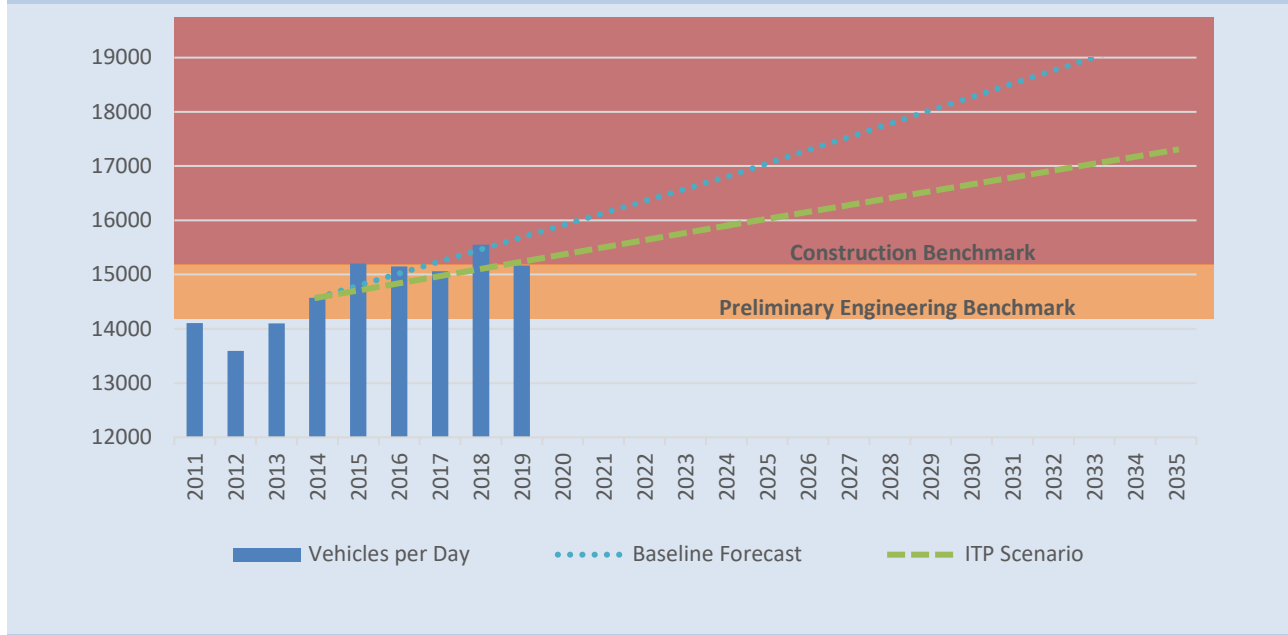
### Corridor Improvement Benchmarks

The Corridor Improvement Benchmarks are a series of 3 indicators that monitor the number of vehicles per day on Highway 22, the Moose-Wilson Road, and US 26 against corridor improvement benchmarks identified in the Integrated Transportation Plan (ITP). Once these benchmarks are reached, a suite of capital improvement projects in the respective road corridor is triggered.



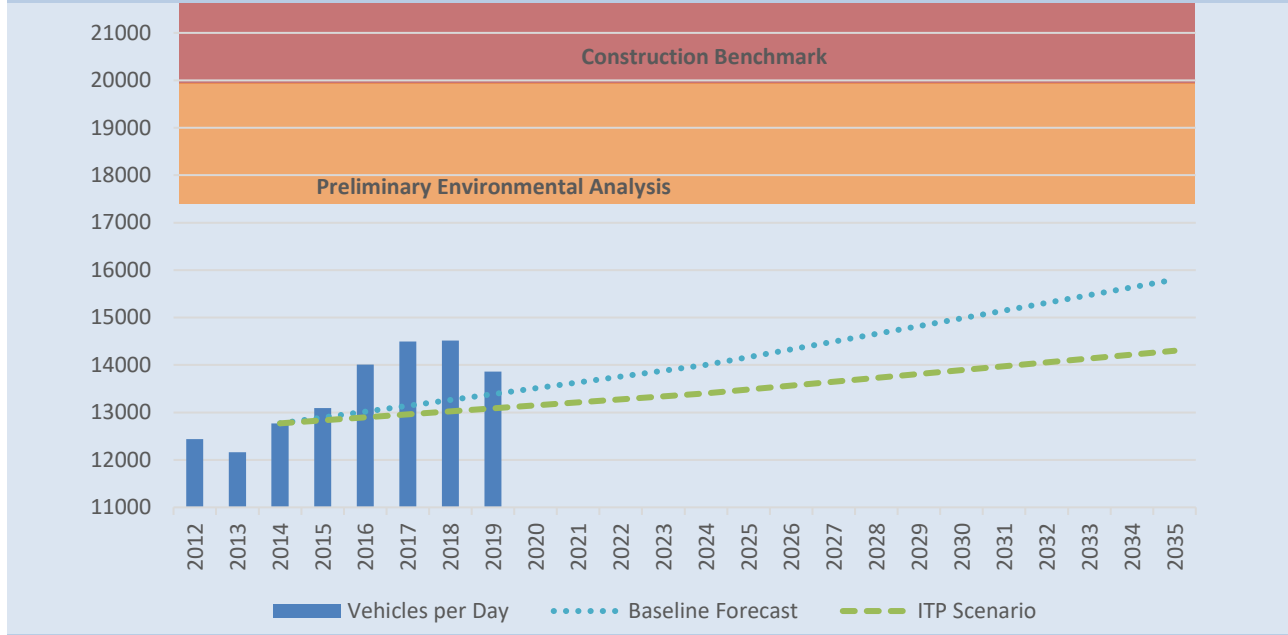
Source: WYDOT

### Moose-Wilson: Average Summer Weekday Traffic vs. Corridor Improvement Benchmarks



Source: WYDOT

### US 26: Average Summer Weekday Traffic vs. Corridor Improvement Benchmarks

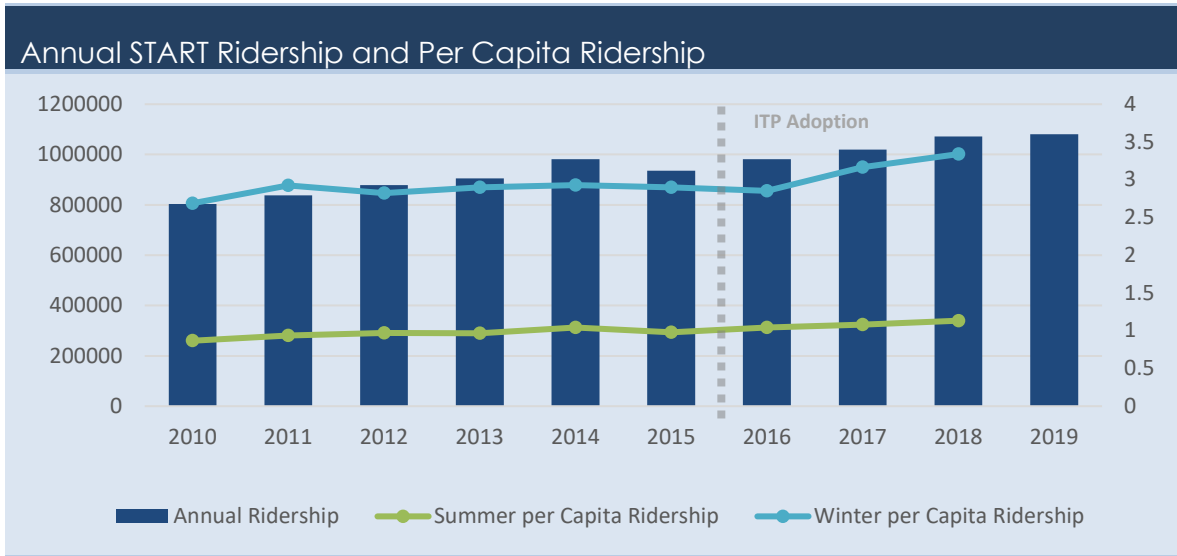


Source: WYDOT



### START Annual Ridership (Goal: ≥ 3,600,000 by 2035)

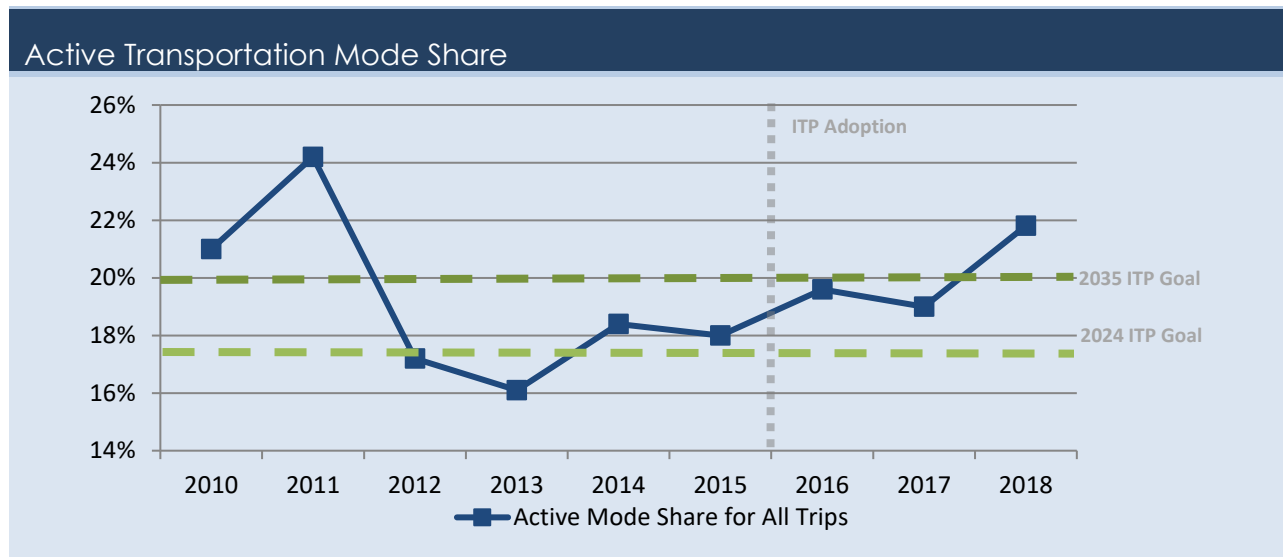
START Annual Ridership measures the annual number of trips made on public transit. The Integrated Transportation Plan establishes objectives of achieving 1.8 million riders in 2024 and 3.6 million in 2035.



Source: START

### Active Transportation Mode Share (Goal: ≥ 20% by 2035)

Active Transportation Mode Share measures the percentage of trips made by walking or cycling. The Integrated Transportation Plan identified active transportation mode share goals of 18% by 2024 and 20% by 2035.



Source: ITP Dashboard, American Community Survey

### Level of Service (Goal: Monitor)

While the Town and County continue to transition toward budgeting that is based on maintaining level of service, standard definitions and metrics for each community service have not yet been developed.

### Quality of Life Next Steps

The next steps for quality of life are being identified through the GMP update to the Comprehensive Plan. A draft of the updated Comprehensive Plan will be released March 20, 2020. See also the proposed 2020 Work Plan for the steps that will be taken in the next year.