Appendix D: 2020 MTP/SCS Land Use Forecast Documentation

Introduction

For each quadrennial MTP/SCS update, SACOG prepares a forecast of regional growth in population, employment, and households, and a forecast of the land use pattern that will accommodate that growth. Under Senate Bill 375 (SB 375), these are required components of the Sustainable Communities Strategy (SCS). The regional growth and land use forecast of the MTP/SCS are:

- prepared using state-of-the-art data, analysis, and modeling tools;
- designed to help the region achieve its goals within the confines of how real estate markets actually function and local governments exercise their land use authority; and
- executed in a manner that helps achieve local and regional goals while maintaining the flow of transportation funds to the region and meeting other federal and state requirements.

The overarching challenge in preparing the regional growth forecast and the land use component of each MTP/SCS update is to forecast the amount and nature of growth for the next two-plus decades so that a transportation system can be planned and built to serve that growth, while maximizing the positive benefits for the region and its residents and minimizing the negative impacts. SACOG strives to do this with two seemingly contradictory goals in mind: using increasingly sophisticated tools to improve the accuracy of its long-range projections, while writing a plan that recognizes the fact that open market and policy/regulatory forces inevitably will shape the future in ways that are not possible to completely predict or control.

To meet this challenge, SACOG strives to follow the management and planning path employed by the best private businesses and public agencies, including: examining a wide range of alternative futures; trying to understand the many variables that could influence the future; picking a future to head towards and developing clear strategies for getting there; and constantly monitoring progress and quickly adapting to the inevitable changing circumstances encountered along the way.

For SACOG, the Blueprint scenario planning and visioning effort were the first steps along this path, by examining a wide range of alternative growth and transportation patterns for the region, understanding the variables affecting those choices, and choosing a future and strategies to get there. The MTP/SCS, is another step along that path, and the four-year regular plan update cycles provide the means to constantly monitor progress, learn more about the region’s growth dynamics, and make frequent mid-course adjustments.

While many factors are considered, there is not a single mathematical formula or computer program used to create the land use forecast. The analytical process is iterative. Multiple variables are evaluated, and as the picture gets clearer and more focused, many of these factors are rechecked, adjusted, rechecked, and adjusted again until a forecast is created that can credibly be described as an ambitious but achievable forecast of how the region’s land use pattern will evolve through 2040. Soon after the plan is adopted, the next plan update cycle begins, following the same process. Actual development activity is tracked and documented, data sources are refreshed, and new and better analytical tools are constructed, as the region collectively works to continually improve at understanding all of the complex dynamics that influence growth patterns and how to maximize the positive, and minimize the negative, consequences of growth.

Including growth within the MTP/SCS is not a guarantee that it will happen. Likewise, growth in areas outside the MTP/SCS may occur during the planning period. Growth outside the MTP/SCS may or may not be consistent with the smart growth, long-term, Blueprint vision for the region. In any event, however, SACOG has no authority to require or prohibit growth of any kind. While local agencies may take advantage of certain CEQA benefits and other incentives, CEQA does not mandate that local agencies use the MTP/SCS to regulate GHG emissions or for any other purpose. Senate Bill 375 also specifically states that a sustainable communities strategy does not regulate land use, that city and county land use policies and plans are not required to be consistent with the MTP/SCS, and that nothing in a sustainable communities strategy “shall be interpreted as superseding the exercise of the local land use authority of cities and counties within the region.” (Gov. Code, § 65080(b)(2)(J)). The MTP/SCS does not regulate local land use authority or preclude a local jurisdiction from planning and approving growth that is different in terms of total units or geographic extent.

Regulatory Setting

The growth forecast, and the process for developing it, are affected by federal and state requirements related to regional transportation plans and the Clean Air Act. (See Cal. Gov. Code, § 65080; 23 U.S.C. § 134; 42 U.S.C. § 7506; 23 C.F.R. pt. 450; 40 C.F.R. pt. 93). In general, these laws and regulations require SACOG to develop a forecasted land use pattern, based upon the best available information, in order to, among other things, design specific transportation improvements to serve that land use, and to perform travel modeling to determine the performance of the transportation system and determine whether the plan, including its land use and transportation components, meets federal air quality conformity requirements. This process is also affected by SB 375, and specifically its requirements to include an SCS, to calculate the greenhouse gas emissions resulting from passenger vehicles and enable the CEQA streamlining benefits for projects that are consistent with the SCS.

Additionally, the Sacramento-San Joaquin Delta Reform Act of 2009 (Delta Reform Act), Senate Bill X7 1 (Stats 2009, 7th Ex. Sess., Ch. 5), provides an exemption from the Delta Reform Act’s provisions for projects within the secondary zone of the Delta that are consistent with the SCS. More information on the Delta Reform Act and how it relates to the MTP/SCS is at the end of this chapter in the “Application of the SCS” section.

Following the federal and state regulations above, SACOG prepared an estimated 2040 growth pattern for the region, which is the land use forecast. This land use forecast is the result of two processes: a public engagement process including board direction and a series of public workshops, and a more technical process that included a consideration of market analysis and policy/regulatory factors. As discussed below, the amount of input and the number of variables in each of these processes are many.

Methodology for Creating the Land Use Forecast

Regional Growth Forecast

The MTP/SCS identifies areas within the region sufficient to house all of the forecasted population of the region, including all economic segments of the population over the course of the MTP/SCS planning period. The population forecast for the MTP/SCS is based on an economic forecast for the region that follows three major steps: (1) employment projections based on projections of U.S. and California job growth and the competitive position of the Sacramento region to capture a share of the state and national job growth; (2) population projections based on projected job growth, accounting for foreign immigration and domestic migration into the region; and (3) household projections based on projected population growth. The regional growth forecast sets year 2040 housing and employment growth totals that the land use forecast needs to achieve. It is helpful in that it provides a regional guardrail for the subsequent work to create a land use forecast, which occurs at more specific geographies and considers a variety of other planning objectives.

Table C-1
Comparison of 2016 MTP and Proposed MTP/SCS Regional Growth Forecasts

	2016 MTP/SCS (Forecast Period 2012-2036)				Proposed 2020 MTP/SCS (Forecast Period 2016-2040)			
Year	Jobs	Population	Households	Housing Units	Jobs	Population	Households	Housing Units
2012	887,911	2,268,138	847,553	903,451	N/A	N/A	N/A	N/A
2016	N/A	N/A	N/A	N/A	1,060,751	2,376,311	881,799	921,123
2035	1,327,265	3,078,772	1,140,202	1,188,347	1,279,016	2,903,090	1,100,474	1,144,694
2040	N/A	N/A	N/A	N/A	1,330,813	2,996,832	1,136,599	1,181,251

Source: SACOG and CCSCE, 2017; SACOG 2019.

Existing Capacity Analysis

The foundation of the entire process is adopted local government general plans, community plans, specific plans and other local policies and regulations. SACOG is required to consider adopted local land use plans in the formulation of the land use forecast. Most of the other variables that are considered serve to help refine the sum of the local plans in order to create a future development pattern. To consider these plans most effectively, SACOG creates a set of "build out," or existing capacity, assumptions for the region. This involves creating an inventory of unbuilt capacity for housing and employment uses, based on existing, adopted plans. In addition to adopted plans, draft plans under development, in or about to begin the entitlement process, are also inventoried for their proposed housing and employment capacity.

Many variables are considered that help to estimate the timing of growth within planned capacities. These variables also sometimes serve to modify the estimated upper-end growth amounts expected from the plans. Major variables considered include:

- Availability of existing infrastructure, and economic feasibility of providing additional needed infrastructure (e.g., transportation, water, sanitary and storm sewer).
- Floodplain issues, including the timing and likelihood of successfully providing needed flood protection infrastructure.
- Natural resources issues, especially whether federal permits under the Clean Water Act and/or the Endangered Species Act are required and, if so, the expected timing of securing these permits.
- Feasibility and timing of securing any needed permits to address brownfield (i.e., toxic substances) issues.
- Likely timing of securing any needed additional local approvals (e.g., land use entitlement, annexation approval, sphere of influence approval)

Some of these variables serve to reduce the estimated capacities in the local plans, but analysis of these variables primarily affects the estimated timing of the construction of the plans.

From Buildout Capacity to a Land Use Forecast

As noted above, SACOG builds the land use component of the MTP/SCS on the foundation of the 28 city and county general plans of SACOG member jurisdictions, and their other local plans, regulations and policies. However, SACOG's MTP/SCS growth forecast can never be just the sum of its 28 member local governments' adopted general plans at any given point in time. The MTP/SCS and local general plans are two related, but different, kinds of planning documents. General plans are by nature aspirational, have widely ranging timeframes and are not comprehensively updated frequently. The MTP/SCS must be a fiscally and time-constrained plan, with a forecasted growth pattern that is consistent with—i.e., not exceeding—the region's 2040 forecasted population, employment, and housing growth. For example, if a city has a general plan with a 20-year planning horizon, the MTP/SCS growth forecast may indicate growth on only a portion of the land designated in the city's general plan for future growth. The reverse may also be true. The MTP/SCS growth forecast may show growth in areas that are not yet formally included in a county's or city's general plan if SACOG estimates that there is market demand for growth in that location and that the entitlement process can realistically be expected to be successfully completed and construction begun during the planning period.

As noted above, the inventory of land use plans forms the basis for allocating housing and employment growth spatially within a jurisdiction. The decision on how much and what kind of housing and employment to forecast is based on an analysis of other policy, regulatory, and market factors. These data are particularly important in assessing development readiness of specific plans and master plans, which, unless they are under construction, inevitably require some amount of local, state or regional entitlement plus infrastructure improvement required in order to begin construction. The following is a sample list of factors considered in the estimation of growth within subareas of a jurisdiction: status of local, state and federal entitlement applications, as applicable; past housing permit activity in the vicinity of the project; major infrastructure requirements; developer readiness to pursue entitlement and construction; proximity to job centers and services; and housing product mix. These and additional factors are described in detail in the table below.

Not all of these factors are easily quantifiable; SACOG considers factors about each area in relative terms. In other words, for any given development factor (e.g., major infrastructure requirements), all projects are evaluated relative to each other. Additionally, while the build out capacity assumes maximum build out of every parcel, the land use forecast does not. The land use forecast does consider environmental constraints such as wetlands, vernal pools, and oak woodlands, as well as market constraints such as parcel size, and the fact that not every parcel builds to the maximum allowed density or intensity. The effect of this evaluation is a filtering of projects that are more likely and less likely to build during the course of the plan update, followed by how much growth can be expected.

Attachment C: Factors Considered in Updating the MTP/SCS Land Use Forecast

	Regulatory/Policy and Market Factors	Description of projects assumed to have the highest likelihood to build within 20 years	Middle range of conditions	Description of projects assumed to have the lowest likelihood to build within 20 years
REGULATORY	**Local Entitlements**	Specific Plan approved, Annexation complete (if required), Tentative Map(s) in process	Range of conditions includes: projects that are approved but still need annexation; projects approved but no tentative maps submitted; projects approved but have unsettled lawsuit; projects currently in process; projects in pre-application	No current entitlement activity; identified by general plan or SOI as future growth area
	State/Federal Entitlements	Approved	Range of conditions includes: projects that are not yet approved but in process; projects participating in an HCP or NCCP; projects with no significant resource issues	Significant, unresolved resource issues
POLICY	**Air Quality**	In SCS with lower VMT than average for Developing Communities	Range of conditions includes: projects that are in the SCS with average VMT; projects in the SCS with higher than average VMT; projects not in the SCS with lower than average VMT; projects not in the SCS with average VMT	Not in SCS with above average VMT for Developing Communites
	Regional Plans and Policies	Consistent with 2012 MTP/SCS and Blueprint	Range of conditions includes: projects in MTP/SCS and partially consistent with Blueprint; projects in MTP/SCS and not consistent with Blueprint; projects consistent with Blueprint and not MTP/SCS; projects partially consistent with Blueprint and not in MTP/SCS	Not consistent with 2012 MTP/SCS or Blueprint
MARKET	**Proximity to Job Centers**	Close proximity to a regional jobs center	Range of conditions includes: projects partially within 4 miles of a regional job center; projects within 4 miles of a secondary job center; partially within 4 miles of a secondary job center	Significant distance from any job center(s)
	Housing Mix	Mix of housing types including mostly small-lot and attached	Range of conditions includes: projects that have a mix of housing types including small-lot and attached housing at varying amounts; projects that are primarily large-lot residential because they are in more rural areas	All large-lot single-family where higher densities could be supported (i.e more urban or suburban locations)
	Market Area Saturation	Historically high market demand and limited number of approved or pending projects in market area	Range of conditions includes: projects in areas with high market demand and high number of approved or pending projects in market area; projects in areas with average market demand and a high number of approved or pending projects in market area; projects in area with lower market demand and a high number of approved or pending projects in market area, but have a unique factor that could significantly change the market demand for the area	Historically low market demand and a high number of approved or pending projects in market area
	Adjacency	Adjacent to existing urban development or has significant borders with a city boundary or areas designated for future urban development	Range of conditions includes: projects that are adjacent to existing development at varying rates	Less than 10% adjacent with existing urban development,a city boundary or areas designated for future urban development
	Developer Activity	Very active, single ownership or experienced ownership partnerships, multiple completed projects in region	Range of conditions includes: very active to active, single or multiple ownerships with no development history; single or mulitple ownerships with varying levels of activity and some projects completed in the region; single or mulitple ownerships with varying levels of activity and no history of completed projects in or outside the region	Not active, single or multiple ownership, no completed projects in the region
	Transportation Infrastructure	No major or regional infrastructure needed or infrastructure is fully funded	Range of conditions includes: projects that have some infrastructure, but need more; projects that can build some before significant infrastructure investment is needed; projects that need significant infrastructure and have funding	Significant infrastructure needed and not funded or not yet defined
	Other Infrastructure (sewer, water, flood control, etc)	No major or regional infrastructure needed of infrastructure is fully funded	Range of conditions includes: projects that have some infrastructure, but need more; projects that can build some before significant infrastructure investment is needed; projects that need significant infrastructure and have funding	Significant infrastructure needed and not funded or not yet defined

Vetting the Land Use Forecast

All the land use data and assumptions are vetted through planning staff at each SACOG member jurisdiction. To support local staff's review, SACOG provides jurisdiction-level tabular summaries showing housing and employment estimates for 2016, 2035, 2040, and build out capacity at the Community Type level, as well as a corresponding Community Type map. If other summaries, maps, or individual data files are requested, SACOG also provides these. After receiving comments and feedback from the jurisdictions, SACOG uses the new information provided as well as all the data and considerations outlined earlier in this document, to determine if proposed refinements should be made to a scenario. A change in one jurisdiction can affect growth assumptions elsewhere in the region, so when refinements are proposed, all jurisdictions are re-analyzed to determine whether or not the refinements should be made and where other refinements may be required in order to maintain the regional housing and employee growth totals. The revised information is again circulated to local jurisdiction planning staff for review.

Throughout the 2020 MTP/SCS process, SACOG conducted review periods directed to local planning staff at various stages of the plan update. Each review period was a minimum of six weeks. The various review periods are summarized as follows:

- The first vetting of information occurred in early 2018, with local staff review of the 2016 existing conditions and build out estimates.
- The next period of review occurred in April and May of 2018 with local staff review of the 2035 and 2040 Discussion Draft Scenario.
- SACOG staff then developed a preliminary draft preferred scenario for vetting again through local planning and public works staff, February to March 2019.

2020 Discussion Draft Land Use Scenario

Learning from the 2016 MTP/SCS Scenarios

Since the Blueprint, SACOG has adopted scenario planning as a data-driven way to examine a wide range of alternative growth and transportation patterns for the region. Scenario planning was used in the Blueprint project and in every subsequent MTP/SCS update. The 2016 MTP/SCS land use forecast was created after analyzing three different land use and transportation scenarios. Each scenario planned for the same regional total of people, jobs, and homes, were fiscally constrained to the same transportation budget, and all represented a reasonable range of possible futures. They varied principally by how much housing and transportation choice they created. These three scenarios were used to test the effect of different regional land use and transportation investment packages on land use, travel, and air quality policy objectives. The scenarios were designed to be reasonable and based on the most recent regulatory, demographic, and market trends. The scenarios ranged from Scenario 1 (highest amount of outward development and corresponding roadways expansion) to Scenario 3 (highest amount of infill development and corresponding maintenance of the existing transportation system, new transit, and multi-modal infrastructure), with a Scenario 2 in the middle. The transportation investments of these scenarios were designed this way because we know from the Blueprint and subsequent national studies of land use pattern and travel behavior that low density development is most efficiently served by auto-oriented investments (roadways), and medium to higher density development is most efficiently served by transit, walking, and bicycling infrastructure.

Scenario 1 assumes a future with a modest increase in compact development and modest increase in maintaining and improving the current transportation system, compared to past regional trends. Overall this scenario continues the outward development pattern of the past, and provides the fewest housing and transportation options. Compared to the other two scenarios and the proposed MTP/SCS, this scenario provides the highest proportion of new large-lot single-family and rural residential housing, the least amount of growth through infill and redevelopment, and the least improvement in jobs-housing balance within subareas of the region. Specifically, 61 percent of the new homes are small-lot or attached and just over half (51 percent) of the new homes are located in Developing or Rural Residential Communities, which is significantly higher than the other scenarios. Scenario 1 has the largest growth footprint, consuming almost 76,000 acres of land.

Scenario 2 is less dispersed than Scenario 1. Compared to Scenario 1, this scenario would have a higher share of new compact housing (71 percent), more growth in high frequency transit areas, and fewer developed acres, due to a more compact development pattern. This is in part due to a higher percentage of new homes in Center and Corridor Communities and Established Communities, compared to Scenario 1. Compared to Scenario 3, Scenario 2 has less compact housing, less growth in TPAs, and more acres developed.

Scenario 3 is more compact and has more mixed land uses than Scenario 2. Scenario 3 maximizes transit ridership for the purposes of gaining an understanding of what would be required to generate a high increase in transit ridership. Scenario 3 and Scenario 1 are bookends to Scenario 2 in terms of analyzing land use and transportation options. To achieve the level of transit ridership for Scenario 3, land use assumptions were made that go beyond the federal requirements of what is reasonable to assume. For instance, the scenario relies on a higher amount of attached housing, especially near transit, than the market and financial incentives currently will support. Additionally, Scenario 3 includes a high funding allocation for transit and relies on an exceptionally high transit farebox recovery rate, both of which are unlikely to given current transit operations. Scenario 3 has the highest percentage of new compact housing (76 percent) and the smallest development footprint in comparison to the proposed MTP/SCS and the scenarios described above. Compared to Scenarios 1 and 2, Scenario 3 would have the highest percentage of new homes in Center and Corridor Communities and the least amount of new growth in Developing Communities and Rural Residential Communities.

Approach to Discussion Draft Land Use Scenario

The Discussion Draft Land Use Scenario represented an effort to use the learnings from past MTP/SCS scenarios to set guardrails for a single land use scenario. This "Discussion Draft Land Use Scenario" was then used for testing and analyzing new policy topics like autonomous vehicles, congestion pricing, next generation transit, and cost-benefit strategies. Given the fact that the California Air Resources Board's greenhouse gas reduction target changed from -16 percent to -19 percent, any land use forecast that meets the -19 percent target would need to perform at least as well as the 2016 MTP/SCS land use forecast.

As such, the Discussion Draft Land Use Scenario maintains, or improves, the performance outcomes of the current plan, including meeting the new GHG reduction target. To meet these outcomes, the scenario must start from land use inputs that are comparable to or better than what is in the current plan. From a land use perspective, the 2016 MTP/SCS scenario analysis provided some key takeaways about our ability to get the quality of life outcomes we want to see in the future and achieve our GHG reduction target:

> 1) The balance of growth between infill and greenfield matters. Infill development utilizes and invests in existing public infrastructure, shortens travel distances between destinations, encourages more walking, biking, and transit trips, brings new investment into older suburban corridors, and helps to conserve our natural resources and agricultural lands. A scenario with more growth in infill areas than in greenfield areas will revitalize older suburban corridors and downtowns, and is essential to maintaining or improving the plan's performance.
>
> 2) The diversity of the housing stock matters. A variety of housing choices, such as apartments, townhouses, and single-family detached homes on varying lot sizes, creates opportunities for the variety of people who live in them: families, singles, seniors, and people with special needs. This issue is of particular concern for people with very low-, low-, and moderate-income, for whom finding affordable housing close to work is challenging. Existing housing stock is overwhelmingly made up of large-lot single-family homes because much of it was built at a time when a high percentage of our population was made up of married couples with children. This is no longer the majority demographic today or in the future: our demographic forecasts tell us we will see significant increases in the number of singles living alone and in the number of households headed by someone 65 years or older. There is a mismatch between the diversity of our households and our housing stock. A scenario with a large percentage of the new homes in other housing types will meet future demand, offer more housing choice in the future than exists today, and is essential to achieving the performance goals of the MTP/SCS.

3) The timing of development and the rate of absorption in Developing Communities matters. A traditional residential greenfield development pattern starts with construction of homes first, then eventually, after enough homes are built, construction of some neighborhood-serving retail, schools, transit, etc. Until the neighborhood reaches a critical mass of homes (which varies by community), a lot of people living in these Developing Communities will likely be driving relatively long distances for many of their daily activities. While most of the Developing Communities proposed in our region are Blueprint supportive in their plans for jobs, services, transit, and other public amenities, those non-residential components—the components that create complete communities—are usually built after most of the homes are constructed. That means the transportation benefits of a Developing Community don't show up until the jobs, services, transit, and other public amenities start showing up. Uncoordinated new growth, characterized by small amounts of development across a large number of spread out Developing Communities could increase vehicle miles traveled and congestion if the homes are not contributing to a better jobs-housing balance for the area. A development pattern with fewer Developing Communities that are more built-out will provide housing choice and maintain or improve regional transportation performance.

Community Types and Housing Types

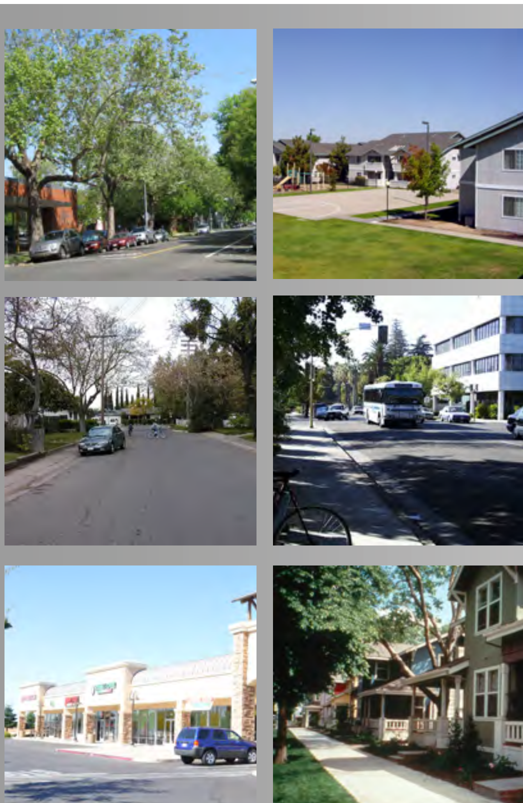
SACOG has created a framework for describing the MTP/SCS that is made up of Community Types. Local land use plans (e.g., adopted and proposed general plans, specific plans, master plans, corridor plans, etc.) were categorized into one of five Community Types based on the location of the plans. SACOG uses this Community Types framework to describe the MTP/SCS land use pattern. In addition to the community types, SACOG also created different housing types to describe four generalized housing typologies. The five community types and the four housing types are described in detail below.

COMMUNITY TYPES

CENTER & CORRIDOR COMMUNITIES

Land uses in Center and Corridor Communities are typically higher density and more mixed than surrounding land uses. Centers and Corridors are identified in local plans as historic downtowns, main streets, suburban or urban commercial corridors, rail station areas, central business districts, or town centers. They typically have more compact development patterns, a greater mix of uses, and a wider variety of transportation infrastructure compared to the communities surrounding them.

Some have frequent transit service, either bus or rail, and all have pedestrian and bicycling infrastructure that is more supportive of walking and bicycling than other Community Types.



ESTABLISHED COMMUNITIES

Established Communities are typically the areas adjacent to, or surrounding, Center and Corridor Communities.

Many are characterized as “first tier,” “inner ring,” or mature suburban communities. Local land use plans aim to maintain the existing character and land use pattern in these areas. Land uses in Established Communities are typically made up of existing low- to medium-density residential neighborhoods, office and industrial parks, or commercial strip centers. Depending on the density of existing land uses, some Established Communities have bus service; others may have commuter bus service or very little service. The majority of the region’s roads are in Established Communities in 2012 and in 2036.

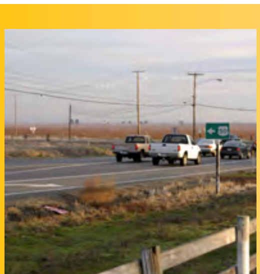
COMMUNITY TYPES




DEVELOPING COMMUNITIES

Developing Communities are typically, though not always, situated on vacant land at the edge of existing urban or suburban development; they are the next increment of urban expansion. Developing Communities are identified in local plans as special plan areas, specific plans, or master plans and may be residential-only, employment-only, or a mix of residential and employment uses.

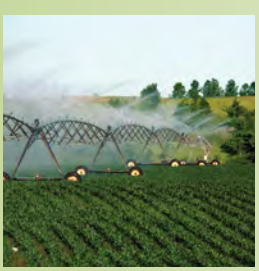
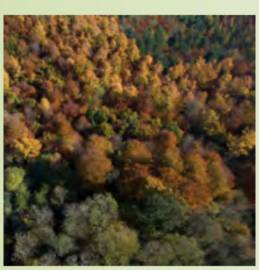
Transportation options in Developing Communities often depend, to a great extent, on the timing of development. Bus service, for example, may be infrequent or unavailable today, but may be available every 30 minutes or less once a community builds out. Walking and bicycling environments vary widely though many Developing Communities are designed with dedicated pedestrian and bicycle trails.




RURAL RESIDENTIAL COMMUNITIES

Rural Residential Communities are typically located outside of urbanized areas and designated in local land use plans for rural residential development. Rural Residential Communities are predominantly residential with some small-scale hobby or commercial farming. Travel occurs almost exclusively by automobile and transit service is minimal or nonexistent.

LANDS NOT IDENTIFIED FOR DEVELOPMENT

These areas of the region are not expected to develop to urban levels during the MTP/SCS planning period. Today, these areas are dominated by commercial agriculture, forestry, resource conservation, mining, flood protection, or a combination of these uses. Some have long-term plans and policies to preserve or maintain the existing “non-urban” uses; however, some are covered under adopted or proposed plans that allow urban development and/or are included in the adopted Blueprint vision for future growth.

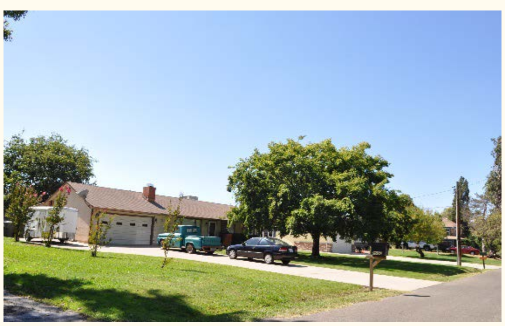
Housing Types

Attached Residential

Single-family or multifamily housing that shares common walls with another unit. This could include housing types like townhomes, duplexes, triplexes, fourplexes, apartments, or condos.

Small-Lot Residential

Single-family detached housing that is typically one to two stories and built on lots 5500 square feet or smaller.

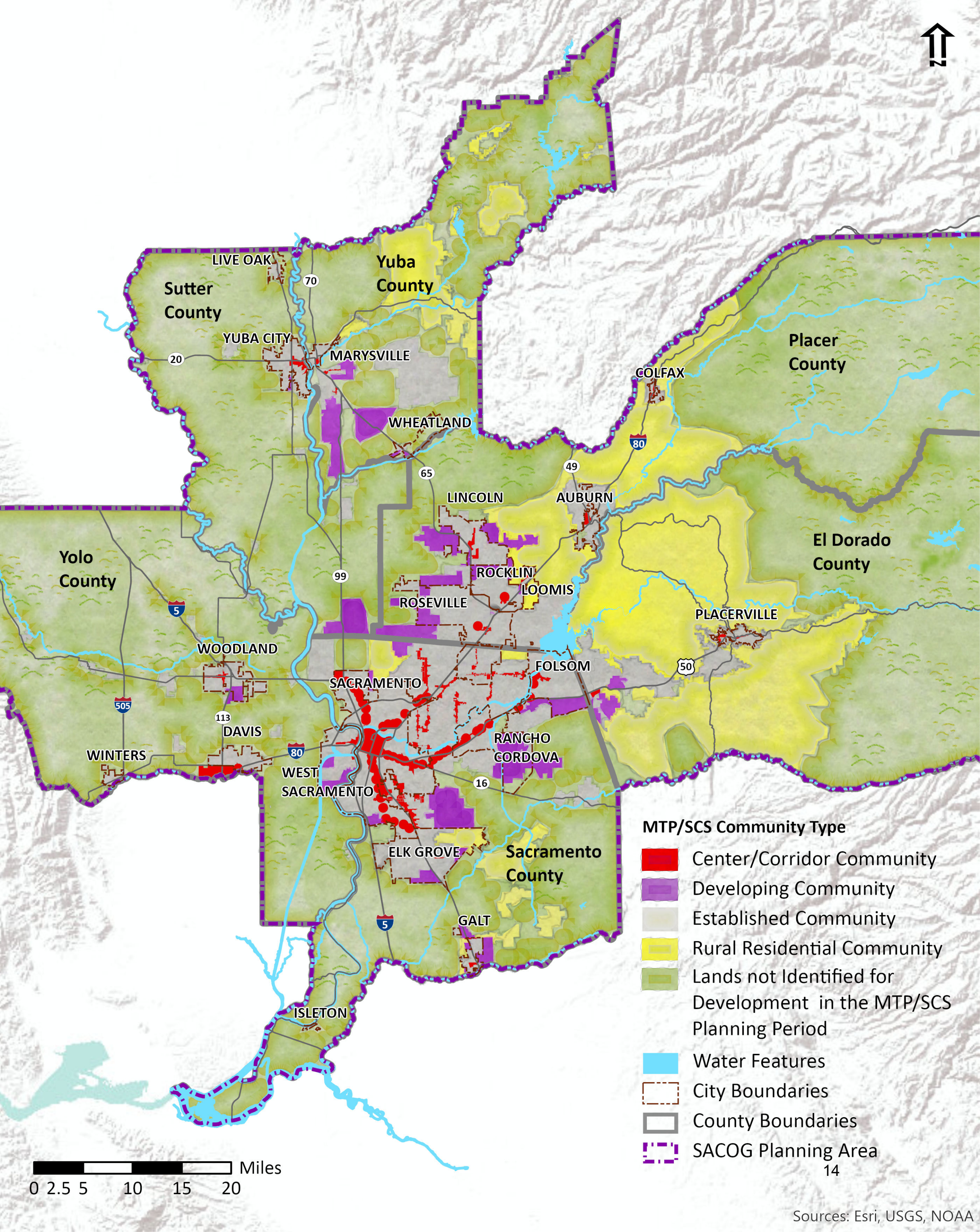


Large Lot Residential

Single-family detached housing that is typically one to two stories and built on lots 5500 square feet or larger.

Rural Residential

Single-family housing typically located outside of urbanized areas, built at a density less than or equal to one unit per acre.


Yuba County
Sutter County
Placer County
El Dorado County
Yolo County
Sacramento County
LIVE OAK
YUBA CITY
MARYSVILLE
WHEATLAND
COLFAX
LINCOLN
AUBURN
ROCKLIN
LOOMIS
ROSEVILLE
PLACERVILLE
WOODLAND
FOLSOM
SACRAMENTO
DAVIS
WINTERS
WEST SACRAMENTO
RANCHO CORDOVA
ELK GROVE
GALT
ISLETON
70
20
65
49
80
99
5
505
113
50
16
MTP/SCS Community Type
Center/Corridor Community
Developing Community
Established Community
Rural Residential Community
Lands not Identified for Development in the MTP/SCS Planning Period
Water Features
City Boundaries
County Boundaries
SACOG Planning Area
0 2.5 5 10 15 20
Miles
Sources: Esri, USGS, NOAA

Framework for a Discussion Draft Scenario

The two most important land use inputs to maintain or improve from the 2016 MTP/SCS are the balance of growth between community types and the housing type diversity. Below is a table showing the land use inputs from the three scenarios analyzed in the 2016 plan, the adopted 2016 plan, and the range used to create the Discussion Draft Scenario for the 2020 MTP/SCS. The graphics below the table provide background information on the Community Types used in the MTP/SCS and the various housing types discussed in the MTP/SCS.

The Discussion Draft Scenario targets a land use pattern that falls between the 2016 MTP/SCS land use pattern, and the more compact Scenario 3 land use pattern described above. Because Scenario 3 performed better than the MTP/SCS, but the adopted 2016 MTP/SCS performed better than Scenario 2, keeping the inputs of the Discussion Draft Scenario between the current plan and Scenario 3 is a way to maintain or improve the performance of the current plan.

This target range of land use inputs applies to both a 2035 and 2040 land use forecast. The range provides flexibility, but also stays within the land use parameters we have previously tested. In other words, a Discussion Draft Land Use Scenario that has a land use pattern within this target range results in the best possible outcomes from a land use perspective: achieving Blueprint land use principles within the reality of current and future market and regulatory conditions.

Table C-2
Target Land Use Inputs for Discussion Draft

Land Use Inputs	Scenario 1	Scenario 2	Scenario 3	2016 MTP/SCS	Discussion Draft Scenario 2035 and 2040
Share of new homes in Established and Center and Corridor Communities	49%	56%	63%	58%	58-63%
Share of new homes in Developing Communities	47%	42%	36%	40%	36-40%
Share of new homes in Rural Residential Communities	4%	2%	1%	2%	1-2%
Share of new homes in large-lot single-family homes	39%	28%	24%	29%	24-29%
Share of new homes in small-lot single-family and attached homes	61%	71%	76%	71%	71-76%

2020 Preferred Land Use Scenario

From Discussion Draft to Preferred Scenario

Using the lessons learned from the Discussion Draft Land Use Scenario, SACOG developed a Preferred Scenario Framework that included a set of policy choices and assumptions born out of the policy direction received from the SACOG Board. That direction was to create a land use forecast that is based on the best available information and that prioritizes performance to help achieve the GHG reduction target. Specifically, the final land use forecast would assume a minimum of 59 percent of the new housing growth in infill areas, which are made up of Established Communities and Center and Corridor

Communities. The scenario could go as high as 70 percent of the new housing in infill, if some of the currently building Developing Communities transition to Established Communities.

Staff also received direction to create a land use forecast that continues to expand the housing diversity in the region by assuming up to 73 percent of the new homes are single-family small-lot and attached homes. This is consistent with the Discussion Draft Scenario.

SACOG staff first reviewed and discussed the Preferred Scenario Framework with the SACOG Board in November 2018, then the board adopted the Framework in December 2018. The Framework provided guidance to staff on how to develop a scenario that meets a 19 percent greenhouse gas reduction target from the state and addresses other regional transportation performance objectives, including maintaining the transportation system, managing traffic congestion, improving air quality, and fostering economic prosperity. Staff worked over the following months to develop the Preferred Scenario. The draft land use forecast was released for local and partner agency review in early January 2019. The Board then adopted a Draft Preferred Scenario Land Use Forecast in April 2019.

2020 MTP/SCS Land Use Forecast

The land use forecast was developed within the policy guidelines set forth in the Preferred Scenario Framework adopted by the SACOG Board in December 2018. It predicts the location of 270,000 new jobs and 260,000 new homes in the region based on local jurisdiction planning efforts. The MTP/SCS establishes an ambitious, but achievable land use forecast predicated, in part, on robust housing development in infill and established communities, more housing choice, and jobs-housing balance. The land use assumptions of the plan represent a shift from the outcomes we have seen in the past and will require a variety of implementation strategies that are outlined in Chapter 4 of the MTP/SCS. There are several important assumptions underlying the land use forecast:

- The land use forecast assumes 64 percent of new homes and 84 percent of new jobs will occur in infill areas, which are characterized in the MTP/SCS as Established Communities and Center and Corridor Communities. The forecast assumes 34 percent of new homes and 15 percent of new jobs by 2040 will occur in Developing Communities, which are new growth areas that have either started construction but are not significantly built out, or are not yet under construction. The remaining small amount of growth is assumed in Rural Residential Communities.
- The split of infill and greenfield growth is not that different from where development is happening today and since the Great Recession. However, the land use forecast assumes that we will see a significant increase in overall housing units being built—roughly a doubling of our average yearly permit rate since the recession. Additionally, the land use forecast assumes more than two-dozen new greenfield areas will begin building prior to 2040. As housing production doubles, and new Developing Communities break ground, it will be critical to maintain a balance of infill and greenfield growth over time to avoid the uncoordinated development pattern of the early 2000s that led to worsening congestion and air quality.
- Single-family homes on larger lots make up the majority of the housing we have in the region today and the majority of what has been built in recent years. The land use forecast assumes a reversal of that trend, with the majority of new homes built as either attached homes or single-family homes on smaller lots. This mix of new housing products is critical to providing housing

choice, affordability, walkability, transportation options, and preserving open space and agricultural land.

- The land use forecast also assumes a concerted effort on the part of jurisdictions to plan for a balance of jobs and housing. Understanding that not all residents will choose to live and work in the same community, more housing near job centers, and more jobs near major residential areas, will provide choice and reduce the growth rate of vehicle miles traveled. The forecast assumes that housing-rich jurisdictions will invest in, attract, and encourage job growth and that today's jobs-rich jurisdictions will invest in, attract, and encourage compact residential development.

Land Use Forecast by Community Type

This section provides a summary discussion of the growth included in each of the previously described community types. The forecast largely relies on growth that is generally consistent with the location, density and intensity of use (Gov. Code, § 65080(b)(2)(B)) in existing general plans or other local adopted plans, but does not utilize all available capacity in those plans by 2040. Table C-3 shows the housing by sector projected in the MTP/SCS. The Community Type map depicts the general areas projected for growth.

Table C-3

Summary of Expected Housing and Employment Growth by Community Type (Dwelling Units and Employees)

	2016				2016-2040				2040			
Community Type	Dwelling Units[1]	Percent of Total	Employees [1]	Percent of Total	Dwelling Units[1]	Percent of Total	Employees [1]	Percent of Total	Dwelling Units[1]	Percent of Total	Employees [1]	Percent of Total
Center and Corridor Communities	113,880	12%	370,890	35%	86,661	33%	82,850	31%	200,541	17%	453,739	34%
Established Communities	712,012	77%	645,326	61%	81,365	31%	146,053	54%	793,377	67%	791,379	59%
Developing Communities	20,793	2%	12,339	1%	89,313	34%	39,754	15%	110,106	9%	52,093	4%
Rural Residential Communities	74,438	8%	32,196	3%	2,789	1%	1,405	1%	77,227	7%	33,601	3%
Region Total	921,123	100%	1,060,751	100%	260,128	100%	270,062	100%	1,181,251	100%	1,330,813	100%

Source: SACOG Proposed MTP/SCS Land Use Forecast for 2040, June 2019.

[1] Due to different protocols among GIS models for tallying spatial data, numbers in this DEIR differ marginally from those reported in the proposed MTP/SCS.

[2] The proposed MTP/SCS does not forecast or model growth in the "Lands Not Identified for Development in the MTP/SCS Planning Period" Community Type during the planning period, though there is existing development in these areas (primarily farm homes, agricultural-related uses, public lands such as waste water treatment facilities, etc.) As a result, existing developed acres in the "Lands Not Identified for Developmentin the MTP/SCS Planning Period "Community Type was included in "Established" and "Rural Residential" Community Type totals.

Center and Corridor Communities

In 2016, these areas have higher concentrations of employment, usually commercial and office, than other Community Types. Most Centers and Corridors will add new development on inifll or underutilized land, or through redevelopment of existing developed land. The MTP/SCS projects that the total share of housing in Centers and Corridors will increase from 12 percent in 2016 to 17 percent in 2040, primarily on infill or underutilized land in close proximity to services and employment opportunities. By 2040, the MTP/SCS land use forecast projects that 33 percent of new housing and 31 percent of new employees will be located in Center and Corridor Communities. Real estate research forecasts that there will be significant demand, especially by the large, retirement age baby boomer generation and the even larger Generation Y echo-boomer cohort (those born between 1981 and 1999), for new housing, including rentals and small-lot homes, in mixed-use communities close to public transit, employment, services and amenities. Many of the local governments in the region have updated, or are in the process of updating, their land use plans to accommodate growth of this type. The MTP/SCS development pattern takes advantage of existing transportation infrastructure (light rail and bus service where present), and creates more types of housing products for the projected population in central locations in close proximity to services and employment opportunities.

Barriers to growth in the Centers and Corridors include limited public and private sector financing, especially in the short term given current lending practices and the lack of redevelopment funds. In many cases, existing infrastructure capacity is not sufficient, and financing improvements can be challenging due to the multiple owners typically found in fine-grained urban lot patterns. Remediating contaminated soils and groundwater is another barrier on some of these lands.

There are examples throughout the region of development opportunities in Centers and Corridors that are on hold because of conditions such as those described above. However, there are also examples of developments that are proceeding because they have overcome the challenges, including a number of new infill and redevelopment projects in downtown Sacramento, the downtown and Curtis Park Railyards in Sacramento and the Bridge District in West Sacramento. About two-thirds of the projected growth in Centers and Corridors in the region is in these two centrally-located cities. Chapter 4 of the MTP/SCS discusses the policies and implementation actions that is needed to help support growth in these areas.

Established Communities

In 2016, Established Communities generally appear established and built out; however, there still are lots of infill development opportunities in these communities. Local land use plans generally seek to maintain the existing character and land use pattern in these areas. For this reason, the MTP/SCS land use forecast projects only an 11 percent increase in housing in this community type, which will primarily occur through the build-out of existing subdivisions, accessory dwelling units, and infill development on vacant lots. This will reduce the total share of housing in Established Communities from 77 percent in 2016 to 67 percent by 2040. This growth represents about 3,390 new units per year. This is a reasonable estimate as it assumes many of the newer subdivisions that started building in the last 10-15 years (e.g., most of North Natomas, most of Lincoln, West Roseville, Laguna in Elk Grove, and most of southeast Folsom) will likely continue to build at a steadier pace than traditional infill in the near term.

The MTP/SCS projects a 23 percent increase in job growth in Established Communities, which will provide more employment opportunities for residents in this Community Type. Established Communities include many office and industrial parks in the region’s secondary and emerging jobs centers, including Metro Air Park, McClellan Park, Sunset Industrial Park, Woodland Industrial Park, and El Dorado Business Park. All of these are projected to see significant growth through 2040.

In general, the MTP/SCS projects smaller changes to residential communities in Established Communities than in other Community Types. Many of these communities are mature or newer suburbs. While infill development, consistent with existing planning designations, is projected to occur gradually, much more change is forecast for the Centers and Corridors and Developing Communities than in the Established Communities.

Development in Established Communities provides housing opportunities for residents, including completion of subdivisions that stalled in the housing downturn, revitalization commercial centers, increase in housing choices, development of more complete streets that balance the transportation needs of auto and non-auto travelers, elimination of blighted vacant lots, and enhancement of neighborhood amenities. However, development challenges exist in these areas. Residential and commercial financing and financial feasibility is currently a challenge everywhere, including Established Communities. Older auto-oriented shopping and strip centers in mature suburbs may be in decline, but market economics may not yet be ripe for reuse projects. Additionally, many neighborhoods have arterials and local streets that experience significant traffic and congestion, need maintenance and rehabilitation, and lack attractive transit, pedestrian and bicycle facilities.

Developing Communities

Developing Communities are typically the areas at the edge of existing urban or suburban development that are slated for the next increment of urban expansion. They are usually identified in local plans as specific plans, special plan areas, or master plans. These communities may be residential-only, employment-only, or a mix of typically low- to medium-density residential with employment and supporting commercial and public uses. A smaller number of Developing Communities have a mix of residential and employment centers. Similarly, a small number of Developing Communities are planned as large employment-only areas.

In 2016, some of these areas are partially developed while others that are not yet approved or under development are still used for farming, grazing, natural resource extraction, or other non-urban uses. By 2040, all of the Developing Communities identified in the MTP/SCS will be fully or partially constructed.

The MTP/SCS projects that 34 percent of the region's forecasted housing demand, and 15 percent of the its employment demand, will be in Developing Communities. This will bring up the share of housing in Developing Communities from two percent in 2016 to nine percent of the total regional housing stock in 2040. Developing Communities see a smaller gain in the regional share of employees—from one percent in 2016 to four percent of all employees by 2040. Unlike Established Communities, which will see high employment growth relative to housing growth, Developing Communities experience high housing growth relative to employment growth. This is due to two factors: (1) most of the residential growth in Developing Communities is not expected to fully build out by the horizon year of the MTP/SCS and, therefore, a critical mass of housing is not present to support planned employment growth; and (2) most Developing Communities are located around existing regional job centers in southwest Placer County, southeastern Sacramento County, and urbanized Yolo County, and are intended to provide nearby housing for those job centers.

The Developing Communities in the MTP/SCS are generally quite different from the large-scale master planned communities typical of the last few decades. Consistent with Blueprint principles, many of them provide a wider range of housing choices, and most are located adjacent to existing job centers. Workers in those job centers will benefit from nearby housing options that can also provide a local resident-serving mix of uses such as schools, parks, and retail. These Developing Communities typically have pedestrian and bicycle networks.

Developing Communities face their share of challenges to construction, including how much overall demand there will be for housing in this Community Type, and the timing of development within each community. Perhaps the largest question regarding Developing Communities is, how much market demand will there be in the long term for the traditional, large-lot single family home. High infrastructure and service costs for roads, transit, water, sewer, drainage, and schools, as well as operating costs for police, fire and other services, are a significant barrier to starting large-scale developments. Local government financial conditions create understandable pressures to set development fees high enough to cover government's total upfront and ongoing costs, but this sometimes affects the profitability and economic viability of development projects. This can be particularly challenging for the smart growth products in the lower price ranges, e.g., small-lot single family, row houses and townhomes, because the fees can push the cost of the homes up higher than the market can bear in some areas. Furthermore, with such a large number of approved plans that have not yet started construction, and dozens of other area plans in process, the market for master planned communities is exceptionally crowded. This land use forecast assumes projects that are completely through the entitlement process are likely to develop sooner than projects not yet approved. However, many approved development projects have been entitled for more than a decade and are not yet under construction, so entitlement status is not the only predictor of actual construction activity. SACOG monitors policy, regulatory and market factors constantly, and therefore, will reassess the development status of master planned communities as part of the next four-year update to the MTP/SCS.

For Developing Communities in general, there are significant issues related to the federal Endangered Species and Clean Water Acts, administered by the U.S. Fish and Wildlife Service and U.S. Army of Corps of Engineers. This is especially true in and around the two largest suburban employment centers of the region in southwest Placer County and southeastern Sacramento County along the U.S. 50 corridor. There are substantial, multi-year efforts to develop Habitat Conservation Plans (HCPs) in these two areas to resolve the environmental protection and development pressure trade-off issues. The South Sacramento HCP was adopted in 2019 and the Placer County Conservation Plan issued a draft environmental impact report in 2018.

Rural Residential Communities

The majority of growth in Rural Residential Communities is located in the foothills of El Dorado, Placer and Yuba counties. Rural residential designations are intended primarily for residential use but also allow for limited agricultural use where ample water supply and suitable soils are available. Examples of these small-scale agricultural areas include Apple Hill in El Dorado County and Newcastle in Placer County.

The unincorporated portions of El Dorado, Placer, Sacramento, and Yuba counties that are covered by the Rural Residential Community Type generally allow a maximum density of one home per acre. Development in these areas occurs on a small scale, typically through individual lot development. Because of this, the residential capacity in these areas is very high and likely more than the region will ever need. The MTP/SCS estimates that one percent of the projected housing and employment demand, will be met in Rural Residential Communities. Due to the rural and residential focus of Rural Residential Communities, employment growth is minimal. Because of this limited growth, the share of the region's total housing in Rural Residential Communities would decrease from eight percent to seven percent by 2040.

Although growth in these communities is limited, they still offer important housing choice and, in some cases, support the continuation of small agricultural and resource-based businesses.

Nevertheless, many of these communities face challenges, whether from limited or expanded growth. Because of limited nearby jobs, health care, retail and other services, residents in these communities often must travel farther to shopping, professional services, and employment. This adds vehicle travel and associated congestion and air pollution. Providing emergency and other public services to these areas is also a challenge due to their more remote locations. Infrastructure costs, particularly wastewater treatment and water, can be significant for the local agency and landowner.

Land Use Forecast According to Blueprint Principles

A survey of local planning efforts shows that since 2005, the 28 cities and counties of the SACOG region have been working voluntarily to incorporate the Blueprint principles into their local plans and policies. These efforts are reflected in the MTP/SCS land use forecast: the distribution of new development acres through 2040 reflects an urban and suburban-focused development pattern that is far different from the "base case" development pattern that was originally projected for the region before the Blueprint project. The MTP/SCS is aligned in purpose with the Sacramento region's smart land use Blueprint vision. The land use forecast of the MTP/SCS reflects the extent of implementation of the Blueprint principles by local jurisdictions.

The following describes the land use forecast according to the seven Blueprint principles: Housing Choice and Diversity; Use Existing Assets; Compact Development; Natural Resource Conservation; Design for Quality; Mixed Use Developments; and Provide Transportation Choices.

Housing Choice and Diversity

The Blueprint envisioned by 2050 a diverse mix of new housing to accommodate the housing needs and choices of a diverse population. The table below shows that the growth forecasted in the MTP/SCS favors small lot and attached housing products and is in line with the Blueprint.

Table C-4
Housing Product Mix in the Proposed MTP/SCS

	Center and Corridor Communities		Established Communities		Developing Communities		Rural Residential Communities		Regional Total	
2016 Baseline										
Rural Residential1	368	0%	19,378	3%	2,171	10%	53,295	72%	75,212	8%
Large Lot Detached1	27,312	24%	419,485	59%	14,525	70%	16,781	23%	478,103	52%
Small Lot Detached1	17,968	16%	88,387	12%	1,785	9%	3,263	4%	111,403	12%
Attached1	68,232	60%	184,761	26%	2,312	11%	1,099	1%	256,404	28%
Total1	113,880	12%	712,011	77%	20,793	2%	74,438	8%	921,122	100%
2040 (Growth)										
Rural Residential1	6	0%	275	0%	19	0%	2,467	88%	2,767	1%
Large Lot Detached1	1,840	2%	21,288	26%	42,311	47%	302	11%	65,741	25%
Small Lot Detached1	11,350	13%	17,291	21%	22,972	26%	2	0%	51,615	20%
Attached1	73,490	85%	42,494	52%	24,012	27%	18	1%	140,014	54%

Total1	86,686	33%	81,348	31%	89,314	34%	2,789	1%	260,137	100%

Source: SACOG, MTP/SCS Land Use Forecast, June 2019

[1]Due to different protocols among GIS models for tallying spatial data, numbers differ marginally from those reported in the proposed MTP/SCS.

Use Existing Assets

In urbanized areas, development on infill or vacant lands, intensification on underutilized parcels (e.g., more development on the site of a low-density retail strip shopping center), or redevelopment (e.g., re-using existing vacant buildings or lots) often makes better use of existing public infrastructure. Today, 89 percent of the region's housing is located in Center and Corridor Communities and Established Communities. These two Community Type areas are also where 95 percent of the region's jobs are located. The MTP/SCS takes advantage of the infill opportunities in both of these areas: as noted previously, 33 percent of new homes will occur in Centers and Corridors; 31 percent of new homes will occur in Established Communities.

Compact Development

Creating a plan that is more compact encourages more walking, biking, transit use, and shorter auto trips. By focusing on providing more small-lot and attached housing, maximizing infill and redevelopment opportunities, and planning for communities with a mix of uses, the MTP/SCS creates a more compact land use pattern. Approximately 42 percent of the newly developed land is in Established Communities and Center and Corridor Communities. Another 36 percent is in Developing Communities, and these Developing Communities are for the most part located adjacent to Established Communities. This greatly contributes to the reduced impact to natural resources.

Table C-5

Summary of Expected Developed Acres by Community Type

	Existing Developed Acres (2016)		Additional Developed Acres (2016-2040)		All Developed Acres (2040)		All Acres (Developed and Undeveloped)	
Community Type	**Acres[1]**	**Percent Distribution Among Communty Types**	**Acres[1]**	**Percent Distributio n Among Communit y Types**	**Acres[1]**	**Percent Distributio n Among Communit y Types**	**All Acres[1]**	**New Develope d Acres as Percent of All Acres**
Center and Corridor Communities	26,118	4%	3,886	8%	30,003	3.87%	36,999	10.50%
Established Communities	253,187	37%	15,693	34%	268,880	34.69%	1,298,225	1.21%
Developing Communities	17,850	3%	16,573	36%	34,422	4.44%	89,730	18.47%
Rural Residential Communities	389,693	57%	10,251	22%	399,944	51.60%	2,434,858	0.42%
Lands Not Identified for Development in the MTP/SCS Planning Period	n/a2	n/a2	n/a2	n/a2	n/a2	n/a2	2,638,152	n/a2
Region Total	686,847	100.00%	46,403	100.00%	775,138	100.00%	3,863,373	1%

Source: SACOG MTP/SCS Land Use Forecast for 2040, June 2019.

[1] Totals may not match due to rounding.

[2]The proposed MTP/SCS does not forecast or model growth in the "Lands Not Identified for Development in the MTP/SCS Planning Period" Community Type during the planning period, though there is existing development in these areas (primarily farm homes, agricultural-related uses, public lands such as waste water treatment facilities, etc.) As a result, existing developed acres in the "Lands Not Identified for Development in the MTP/SCS Planning Period" Community Type was included in "Established" and "Rural Residential" Community Type totals.

Natural Resource Conservation

Whether for agriculture, habitat, rural home sites, urban development, recreation or open space, the use of land has implications for the viability of rural communities, agricultural operations, and natural habitats, as well as the provision of public services and the creation and maintenance of physical infrastructure. Together, these various uses of land determine the long-term economic viability and environmental sustainability of rural areas and are an important part of achieving similar objectives for the entire region. They also influence rural lifestyle, culture and heritage, which are intangible and difficult to quantify, but are nonetheless important aspects of the MTP/SCS. In the last two decades, 242 acres of primary agricultural land were developed per every 1,000-new people. In the 2020 MTP/SCS land use forecast, only 18 acres of primary agricultural land are predicted to be developed per 1,000-new people by 2040.

Design for Quality

The design details of any land use development can influence the attractiveness of living in a neighborhood and facilitate or hinder walking and biking to work or other destinations. Quality site design creates walkable communities and includes: short block lengths, connected street patterns, and pedestrian-scale design of buildings, streets, sidewalks and landscaping. This is an essential Blueprint principle that will be important to achieving the goals of the MTP/SCS. The MTP/SCS considers a number of factors related to site design details, including regional accessibility and street pattern.

Mixed Use Developments

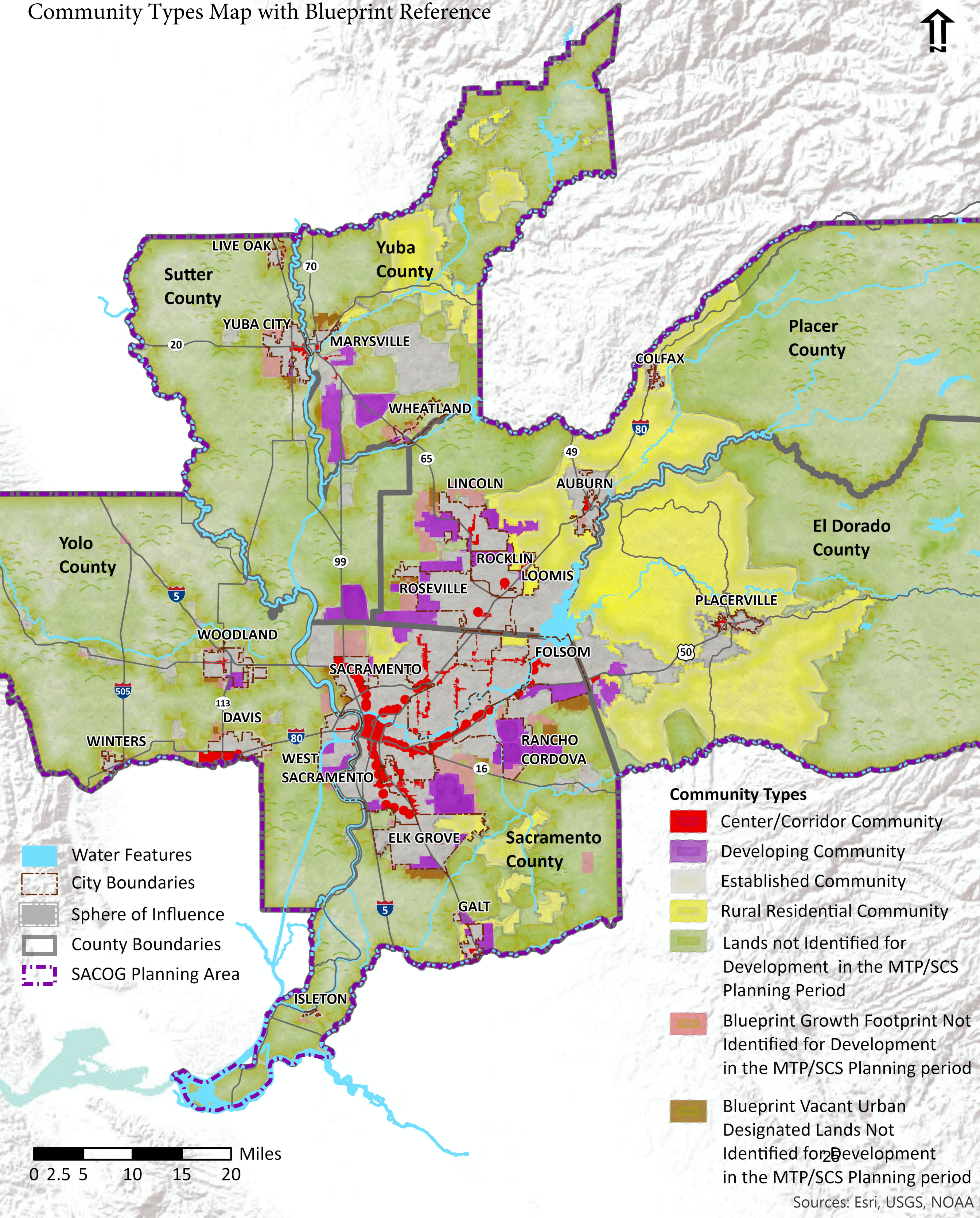
The principle of mixed use developments has different applications at different scales. At smaller scales, this could apply to individual vertically mixed use buildings or a neighborhood with a combination of uses in close proximity. Building homes, shops, offices, entertainment, schools, and other uses within walking distance helps create active, vital neighborhoods. A community designed with a good, or balanced, mix of uses helps to encourage walking, biking, shorter driving trips, and transit use where transit is available. At the full regional scale, this principle is discussed as "jobs-housing balance," and means a balance of jobs and households so that the region does not have to import or export either jobs or housing, beyond the normal out- and in-commuting that happens in a mobile society. For the large sub-regions, especially around the largest employment centers, it is also desirable to attempt to replicate the regional jobs-housing balance ratio. At smaller scales, sometimes the best, most realistic, mix focuses more on population-serving jobs (e.g., schools, retail, etc.) and less on base, or primary, sector jobs. It is, however, still a worthy goal to try to have a strong jobs-housing mix through as many subareas of the region as possible. The MTP/SCS includes all components of this mixed use principle.

The MTP/SCS is, at its core, a regional transportation plan. For that reason, jobs-housing balance and the associated transportation impacts (including their quality of life and air quality impacts) is a key consideration in shaping the land use pattern. In areas with few jobs for the number of households, many workers need to commute out of their residence area to reach work. In areas with more jobs than workers, jobs must be filled by employees from outside the area. All else being equal, areas with high or low jobs-housing balance are likely to generate longer commutes for workers. Generally speaking, the land use forecast assumes that jurisdictions that are housing rich are planning for more jobs and jurisdictions that are jobs rich area planning for more housing in the future. As a result, the land use forecast assumes most jurisdictions move towards a better jobs/housing ratio into the future.

Provide Transportation Choice

Providing transportation choice increases opportunities for people to travel by walking, rolling, and transit. Transportation choice is an essential Blueprint and MTP/SCS principle. When people have viable options to take some of their trips by a mode other than their personal automobile, they reduce the number of miles their vehicle is traveling on roadways. Small changes in individual travel add up to big changes in congestion, wear and tear on roadways, and air pollution for the whole region. The suite of land use and transportation changes in the MTP/SCS reduce household VMT per capita by 7.9 percent. VMT reduction is the primary driver of GHG reduction from passenger vehicle travel. Importantly, providing transportation choice is intricately connected to all of the other land use principles discussed above: increased Blueprint-style development in Center and Corridor Communities supports increased transit investment and complete streets investment, which provides a transportation system that supports increased transit use, bicycling and walking; improved housing and jobs balance around the region—and bringing shopping, employment, housing and services closer together through compact, walkable development—supports shorter and fewer vehicle trips.

Community Types Map with Blueprint Reference



High Frequency Transit Areas

A subset of the MTP/SCS housing and employment growth is within what SACOG refers to as High Frequency Transit Areas (HFTAs). HFTAs are areas of the region within one-half mile of a major transit stop (existing or planned light rail, streetcar, or train station) or an existing or planned high-quality transit corridor included in the MTP/SCS. A high-quality transit corridor is a corridor with fixed route bus service with service intervals no longer than 15 minutes during peak commute hours (Pub. Res. Code, § 1155.) SACOG uses this definition of HFTAs because it coincides with the definition of Transit Priority Projects in SB 375 which, as discussed below, are eligible for CEQA streamlining benefits. HFTAs are considered an overlay geography and do not necessarily correspond directly to Community Types.

While substantial overlap exists between HFTAs and Center and Corridor Communities, HFTAs provide additional opportunities to realize the benefits of smart land use. These opportunities include:

- using SB 375 CEQA streamlining benefits for qualifying residential and mixed-use projects to facilitate transit-oriented development;
- increasing housing choices located near high-quality transit while bringing high-quality transit service to roughly 105,000 housing units and 105,000 employees;
- increasing transit ridership on existing and new rail and bus services, thereby reducing vehicle miles traveled and GHG emissions;
- increasing farebox recovery rates, i.e., rider fares cover a larger share of the costs of transit service; and
- increasing equity by increasing housing and transportation choices and transit access to jobs, schools, and services for low-income residents, as described more fully in Appendix G: Environmental Justice Analysis.

Placer High Frequency Transit Areas

The Placer HFTAs cover Capitol Corridor train station areas in the cities of Roseville, Rocklin and Auburn, as well as high-quality bus routes in the city of Roseville. New development in the Placer HFTAs is employment heavy, due primarily to the concentration of transit serving the Roseville employment centers along the Interstate 80 corridor.

Sacramento High Frequency Transit Areas

The Sacramento HFTAs cover several types of transit routes: light rail station areas within the cities of Folsom, Rancho Cordova, and Sacramento, and unincorporated Sacramento County; a Capitol Corridor train station area in the City of Sacramento; a fixed guideway corridor in the central/downtown area of the City of Sacramento, and numerous bus and bus rapid transit routes in the cities of Citrus Heights, Rancho Cordova, Sacramento, and unincorporated Sacramento County. New development in the Sacramento HFTAs is balanced between housing and employment growth due in part to the extensive geographic coverage of the HFTAs, which include regional job centers (e.g., downtown Sacramento and Rancho Cordova) as well as residential areas and commercial areas. In Sacramento County in particular, most of the cities and the unincorporated county have initiated commercial corridor plans intended to allow significantly more residential development than allowed under past land use plans.

Yolo High Frequency Transit Areas

The Yolo HFTAs cover a Capitol Corridor train station in the city of Davis, affixed guideway corridor in the central area of West Sacramento, and numerous bus and bus rapid transit routes in the cities of Davis and West Sacramento. New development in the Yolo HFTAs is balanced between housing and employment growth due in part to the extensive geographic coverage of the HFTAs, which include regional job centers (e.g., downtown West Sacramento and UC Davis) as well as residential areas and commercial areas.

Land Use Forecast According to High Frequency Transit Areas

Transit is most efficient where there are high concentrations of people, so encouraging and facilitating more new homes and jobs near transit maximizes the transit investment of the MTP/SCS. Within the HFTAs, local governments are working to encourage more housing and employment near existing and planned transit service.

Table C-6

Summary of Housing and Employment within High Frequency Transit Areas[1]

High Frequency Transit Areas (HFTA)[1]	2040 High Frequency Transit Areas[1]					
	Existing Dwelling Units	Existing Employees	New Dwelling Units	New Employees	All Dwelling Units	All Employees
Placer HFTAs	17,638	36,942	11,495	12,073	29,133	49,015
Sacramento HFTAs	325,111	424,122	75,901	75,693	401,012	499,815
Yolo HFTAs	42,318	51,333	17,846	16,765	60,164	68,098
All HFTAs	**385,067**	**512,397**	**105,243**	**104,531**	**490,310**	**616,928**

Source: SACOG, MTP/SCS Preferred Scenario Land Use Forecast, June 2019

[1] High Frequency Transit Areas are those areas of the region within one-half mile of a major transit stop (existing or planned light rail, street car, or train station) or high-quality transit corridor. A high-quality transit corridor is a corridor with fixed route bus service with service intervals no longer than 15 minutes during peak commute hours (Pub. Resources Code, § 21155).

Land Use Forecast by Jurisdiction

As part of the MTP/SCS, SACOG develops a growth forecast, estimating new population, employment, and housing for the region, and a land use forecast, which is the distribution of this growth around the region. The purpose of this section is to describe the general use, density and intensity of the land use forecast for each jurisdiction.

Growth rates and patterns within an area are influenced by various local, regional, and national forces that reflect ongoing social, economic, and technological changes. Ultimately, the amount and location of population growth and economic development that occurs within a specific area is regulated by city and county governments through zoning, land use plans and policies, and decisions regarding development applications. Local government and other regional, state, and federal agencies also make decisions regarding the provision of infrastructure (e.g., transportation facilities, water facilities, sewage facilities) and protection of natural resources that may influence growth rates and the location of future development.

At any point in time, the 28 jurisdictions in the Sacramento Region are at various stages of updating or augmenting their local land use plans. Since the adoption of the Blueprint Vision by the SACOG Board of Directors in December 2004, a number of jurisdictions in the region have been voluntarily implementing the Blueprint smart growth principles into their planning processes. The general plan and specific plan development activities occurring in the region by the local jurisdictions are reflected in the population, housing, and employment forecasts for the 2040 MTP/SCS. At the same time, the 2040 MTP/SCS land use assumptions must be reasonable, based on the best information available (93 C.F.R. § 93.122). The resulting growth patterns are a combination of local policies, many of which reflect or are influenced by Blueprint principles, and market forces leavened by issues such as flooding and habitat conservation.

Definitions for Frequently Utilized Terms in Jurisdiction Summaries

The following terms are used throughout this document to describe the characteristics of the land uses identified in the MTP/SCS.

General Plan- California law requires each jurisdiction in the state to develop and adopt a general plan, a long-term plan for the physical development of the city or county. It must contain seven mandated elements, including: Land Use, Open Space, Conservation, Housing, Noise, Circulation, Environmental Justice, and Safety.

Specific Plan- Sometimes referred to as a master plan, community plan, or planned unit development, this is a tool many cities and counties use to implement the general plan in new growth areas. It effectively establishes a link between implementing the policies of the general plan and the development proposal of a specific area.

Sphere of Influence (SOI)- A sphere of influence refers to a plan for the probable ultimate physical boundary and service area of a city, as determined by the Local Agency Formation Commission (LAFCo). LAFCos are state-mandated, quasi-judicial countywide commissions whose function is to oversee boundary changes of cities and special districts, the formation of new agencies, including the incorporation of new cities or districts, and the consolidation of special districts and cities.

Density- Housing units divided by net residential acres (land on which housing is built, exclusive of public rights-of-ways, parks, schools and public areas). All densities discussed in this section of the MTP/SCS refer to net density.

Rural Residential- Single-family housing that is typically one to two stories, built at a density less than or equal to one unit per acre.

Very Low Density Residential- Single-family housing that is typically one to two stories, built at a density between two and four units per acre.

Low Density Residential- Single-family housing that is typically one to two stories, built at a density between four and eight units per acre.

Medium Density Residential- Single-family or multi-family (attached) housing that is typically built at a density between 9 and 12 units per acre. Typical building heights are one to two stories.

Medium-High Density Residential- Single-family or multi-family (attached) housing that is typically built at a density between 13 and 24 units per acre. Typical building heights are one to three stories.

High Density Residential- Multi-family (attached) housing that is typically built at a density greater than 24 units per acre. Typical building heights are between two and six stories, with taller buildings in the more urban areas.

Commercial- Commercial uses include retail and combined retail and office uses ranging from neighborhood scale to regional scale, generally one to two stories. Up to three stories is allowed when mixed with residential in a vertical mixed-use format. Floor Area Ratios (FAR) generally range from 0.2 to 0.6; however, FAR can be up to 2.0 in mixed use buildings.

Office- Office uses include a range of office buildings from single, small office uses (e.g., generally not including office parks or complexes) that range from one to three stories to multi-story towers (20 or more stories). The minimum FAR is generally 0.8.

Industrial- Industrial uses range from light industrial-office to heavy industrial. This includes business park complexes, warehouses, manufacturing and processing facilities, and other industrial uses generally ranging from one to two stories. FAR are typically 0.3 or less.

Public- Public uses include schools, hospitals, fire stations, airports, military facilities, libraries, community centers, zoos, public pools, etc. FAR are generally about 0.2 to 0.3; however, because of the wide range of public uses, this range can be much larger. For example, universities and hospitals will often have FAR greater than 1.0 and airports, by contrast, are usually very low, at less than 0.05.

Rural Residential Community- This refers to one of the Community Types identified in the MTP/SCS. Residential development forecasted in these areas in the MTP/SCS does not exceed the maximum density of one unit per acre, as defined by general plans. Employment development is generally based on 80 percent of the allowed intensity of the land use designations in adopted general plans.

Center and Corridor Community- This refers to one of the Community Types identified in the MTP/SCS. Unless otherwise noted, development forecasted in these areas in the MTP/SCS is generally based on 80 percent of the allowed density or intensity of the land use designations in adopted general plans.

Established Community- This refers to one of the Community Types identified in the MTP/SCS. Unless otherwise noted, development forecasted in these areas in the MTP/SCS is generally based on 80 percent of the allowed density or intensity of the land use designations in adopted general plans.

Developing Community- This refers to one of the Community Types identified in the MTP/SCS. These areas were modeled according to the density and intensity assumed in the adopted and proposed specific plans, master plans, and special plans discussed throughout this document.

EL DORADO COUNTY

Placerville

Land development in the City of Placerville is significantly limited by topography, as the city is located in a narrow valley surrounded by steep hills. Recently, new development has occurred on individual infill sites and in the Eskaton Village subdivision. As the county seat and a major stop along the tourist routes into the Sierra Nevada foothills and mountains, Placerville has also maintained a relatively strong jobs base in the county. Today the city is primarily characterized as an Established Community in the MTP/SCS. The MTP/SCS also designates a Center and Corridor Community along Placerville Drive and Highway 50 within the city limits.

Growth projections through 2040 reflect continued infill of the city’s vacant and underutilized parcels. Approximately 480 new housing units and 520 new jobs are projected by 2040 in Established Communities and Center and Corridor Communities, building out about 43 percent of the remaining housing capacity. New housing units range from low to medium-high density and new jobs are primarily commercial in the Center and Corridor Community, with new commercial, office, industrial, medical, and public uses in Established Communities. The city’s strong jobs/housing ratio of 2.1 currently is expected to decrease slightly to 2.0 by 2040. Existing general plan capacities allow for an additional 2,000 new employees and 630 new homes post 2040.

SACOG is required to update the MTP/SCS every four years. As a result, SACOG continuously monitors development activity throughout the region to gauge implementation of the plan as well as track policy, regulatory, and market factors that could influence changes in the land use forecast in future updates. At a regional level, SACOG will monitor economic and land development trends, general location and type of housing construction, housing rezones related to the 2021-2029 Housing Element updates, what local agencies are using their SB 2 planning grant funds for, what projects use CEQA streamlining related to the MTP/SCS, employment growth, general plan updates, and new specific plans or master plans. In Placerville, the regional monitoring program will also track the challenges and opportunities of the city’s Civic Lab Year 2 project on Broadway from Main Street to Schnell Street.

El Dorado (Unincorporated County)

Residential development is concentrated in the western half of the county and historically has been rural in nature. Commercial development is generally located along Highway 50 and State Routes 49 and 193. In the last two decades, robust suburban residential and employment growth has occurred at the county’s western edge, in the communities of El Dorado Hills, Carson Creek, Valley View, and Cameron Park. Because these areas have a significant amount of existing homes and employment areas, Cameron Park, the portion of El Dorado Hills that is west of El Dorado Hills Boulevard, the areas immediately adjacent to Placerville, Shingle Springs, and the El Dorado/Diamond Springs area are designated as Established Communities in the MTP/SCS. Today, these areas are primarily made up of low-density housing and supporting commercial and public uses, as well as light industrial uses. The adopted specific plans of Carson Creek, Bass Lake Hills, and Valley View make up the Developing Communities in El

Dorado. The El Dorado Hills Town Center south of Highway 50 and just east of the El Dorado-Sacramento County border has begun generating some job growth outside of the traditional jobs center in the city of Placerville. This area is the only Center and Corridor Community in the county. The county general plan designates “agricultural districts” with the purpose to conserve, protect, and maintain agriculture use in areas throughout the eastern portion of the county. Within these districts, there are stronger policies related to non-agricultural development, including providing a 10-acre buffer between agricultural-related and non-agricultural uses. These areas, along with the eastern half of the county, which is primarily forest and publicly-owned lands, are designated as lands not identified for development in the MTP/SCS planning period, meaning no non-agricultural related development is projected within these areas. The remaining county areas are considered Rural Residential Communities in the MTP/SCS, consistent with the county general plan. Although the general plan includes substantial theoretical opportunities for rural residential construction in these areas, market forces, county policies to protect and promote agricultural uses, and wildfire risk issues are expected to limit the amount of actual rural residential development.

The MTP/SCS forecasts 8,010 new housing units and 8,750 new employees in the unincorporated portion of El Dorado County by 2040. The jobs/housing ratio in 2040 is forecasted to remain unchanged relative to 2016 at 0.7. The Center and Corridor Community is expected to experience growth almost to existing General Plan capacity, including high density residential and office uses in and around the Town Center. Much of the growth by 2040, 3,300 housing units and 7,160 employees, is located within Established Communities. New housing growth in Established Communities range from very low density to medium-high density, the majority of which is continued build out of existing plans. New employment is a mix of neighborhood-supportive commercial and public uses, as well as filling in and expanding existing industrial/office parks along Latrobe Rd., and in various locations along Highway 50.

Developing Communities in the MTP/SCS make up 3,730 of the new housing units and 240 new jobs. Bass Lake Hills, immediately adjacent to El Dorado Hills is planned almost entirely for residential uses, has 1,040 new housing units and 30 new employees by 2040. This area is primarily very low density residential, averaging two units per acre, and increased employment at a neighborhood serving school. The Valley View specific plan area, located just south of Highway 50 from El Dorado Hills has a planned capacity for 2,840 housing units and 150 employees. Housing has recently started building in this area, resulting in the construction of approximately 1,390 homes and 150 employees as of 2016. The MTP/SCS forecast assumes construction of another 1,450 homes by 2040. Like its surroundings, this area has an average density of five housing units per acre and commercial and public employment uses. Carson Creek is a Developing Community located just south of Highway 50 on the Sacramento-El Dorado border which began construction during the past two decades. This area is projected to reach existing general plan housing capacity with 1,240 new housing units in the MTP/SCS planning period, averaging six units per acre. New commercial, office, industrial, and public uses have the potential to generate 3,620 new employees at build out. Of this employment growth, 210 new employees are forecast in the MTP/SCS during the 2040 planning period.

Rural Residential Communities in El Dorado County are expected to experience lower amounts of growth, approximately 770 new housing units and 530 new jobs by 2040. The MTP/SCS forecast assumes relatively small amounts of new rural residential homes and small-scale community-supportive commercial and public uses to be constructed in the region by 2040. This is in part due to changing demographics which suggest a higher percent of the population will choose to live on smaller lots or in attached homes near existing jobs, services, and with more transportation choices.

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PLACER COUNTY

Auburn

Auburn has generally experienced a slow pace of growth over the past 20 years. Development opportunities within the city are limited to scattered infill and redevelopment parcels. Though it covers a large area, Auburn's sphere of influence (SOI) similarly has few large development parcels outside of the redevelopment potential along the Highway 49 corridor (north of the city limits). No large development annexations are not projected to occur. For this reason, most of the city and the SOI are designated as Established Communities in the MTP/SCS. The half-mile radius around the existing Amtrak station and the Highway 49 corridor are identified as Center and Corridors. There is an adopted specific plan known as Baltimore Ravine south of Interstate 80, which is not identified for growth in the MTP/SCS by 2040. Auburn has historically maintained a strong balance of jobs to housing, due in part to its role as the county seat, a shopping and service destination for the surrounding rural areas, and as a stop along heavily-traveled tourist routes to the Sierra Nevada foothills and mountains. The jobs/housing ratio of 1.6 in 2016 is forecasted to remain unchanged through 2040.

Auburn's Established Communities have existing general plan capacity to add approximately 1,630 new housing units through individual infill opportunities. Given the historic nature of residential growth in Auburn, the MTP/SCS forecast is for 360 new homes in Established Communities by 2040. Similarly, these areas have capacity for about 2,510 new employees, but the MTP/SCS forecast is for 780 new employees by 2040. About 370 new employees and 200 new housing units are expected to be added to the Center and Corridor Community around the train station in the MTP/SCS planning period. Growth within the Established and Center and Corridor Communities ranges from very low density to medium-high density residential uses and includes vertical mixed use development, community-supporting commercial, industrial, and office employment uses.

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Colfax

Colfax is a relatively small city that has experienced historically slow growth. Though there are infill opportunities, much of the current development has been there for a long time and the city does not have any large new growth areas. For this reason, most of the city is considered an Established Community in the MTP/SCS. The Interstate 80 corridor is designated as a Center and Corridor Community in the MTP/SCS.

Through 2040, Colfax is anticipated to grow slowly, adding 550 new jobs and 210 new housing units. New development is likely to be small-scale and a significant amount of it is concentrated in and around the Interstate 80 and Highway 174 corridors. New residential uses range from very low density to limited mixed use within the highway corridor and new employment uses include neighborhood-serving commercial, office, industrial, and public development. The increase in anticipated employment development within the corridor is likely to shift the balanced jobs/housing ratio in the city from 0.9 today to 1.1 by 2040.

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Lincoln

The City of Lincoln has been one of the faster growing cities in the Sacramento region for much of the last two decades. The majority of growth has been residential development within the city limits, though commercial development accelerated during the three to four years preceding the Great Recession. For this reason, much of the city limits is identified as an Established Community in the MTP/SCS. The downtown area, because of its location along Lincoln Boulevard and its history as being the town center, is distinguished as a Center and Corridor Community in the MTP/SCS. The Lincoln Boulevard and East Joiner Parkway are also part of the Center and Corridor Community. The city’s 2050 General Plan accommodates a major expansion of the population and city limits. The Plan was developed at approximately the same time as the Blueprint and the two documents are largely consistent with each other. The general plan organizes new growth into “villages.” There are seven villages and three special use districts, each containing a mixture of land uses and densities designed to implement smart growth principles and to recognize the environmental and physical constraints of each village area. Large commercial and industrial uses are planned for the areas along Highway 65. All seven villages are within the city’s SOI. Village 1, Village 5/Special Use District B, and Village 7 have adopted specific plans. Throughout the expansion areas of the city (east and west), a minimum of 40 percent of the gross land area will be dedicated open space and parklands. As a participant in the Placer County Conservation Plan, Lincoln is working with Placer County and federal and state resource agencies over those lands that will be preserved and developed within its future city limits. The MTP/SCS assumes that Village 1, Village 5/Special Use District B, and Village 7 will begin construction within the current MTP/SCS planning period and they are, therefore, designated as Developing Communities. A portion of the current SOI, outside of the Villages, along Highway 65 is designated by the general plan for employment uses, including light industrial and commercial/office uses. This area is also identified as a Developing Community in the MTP/SCS.

The MTP/SCS forecasts 9,010 new housing units and 8,630 new employees in Lincoln by 2040. About 4,110 of the new housing units are in the Center and Corridor Community and Established Communities. This growth ranges from low density to medium-high density, including limited mixed use development in the Lincoln Blvd corridor. Employment growth in Established Communities accounts for 3,000 of the new employees, which includes commercial, office, office park, both heavy and light industrial, and public land uses. Within the Established Communities there still exists additional land capacity for another 9,050 employees. Employment growth in the Center and Corridor Community accounts for 1,900 of new employees of the same uses, plus mixed use, with additional capacity for 2,950 employees at existing General Plan capacity.

The Developing Community that is located along Highway 65 and Industrial Avenue, includes 1,800 new employees by 2040 in the MTP/SCS forecast. This area is designated by the general plan for employment only and, therefore, no housing growth is assumed for this area in the MTP/SCS. This area has capacity beyond the MTP/SCS forecast for an additional 7,270 new jobs. The MTP/SCS forecasts 1,400 housing units, averaging 10 units per acre, and 150 jobs in Village 7, which represents less than half of residential capacity in the Specific Plan. Residential uses in this village range between very low density and medium-high density with limited mixed use. Employment includes some neighborhood-serving commercial and educational uses. Village 1 has a capacity of 4,800 housing units and 680 employees. The MTP/SCS forecasts 2,000 new housing units, averaging 6 units per acre, and 280 employees by 2040. Residential uses in this village range between very low density and high density with some neighborhood-serving commercial and educational uses. The Developing Community of Village 5/Special Use District B include a total of 1,500 new units, averaging 5 units per acre, and 1,500 new employees in the MTP/SCS by 2040. However, this village area is planned for a capacity of 8,320 housing units and 11,400 employees. Village 5 and Special Use District B include regional and neighborhood-serving commercial uses, office uses. Residential uses range between low density and medium density.

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Loomis

The Town of Loomis is a small, rural community that has experienced very little growth in the past 10 years despite its location in the fast-growing southwestern region of Placer County. Loomis' general plan aims to maintain the town's rural character overall. The Town Center Master Plan supports some infill and redevelopment in the downtown area. Because of this, the Town Center area is designated as a Center and Corridor Community in the MTP/SCS, while the housing and industrial employment areas bordering it are characterized as an Established Community and the remaining portions of the city are identified as a Rural Residential Community.

Loomis' projected MTP/SCS growth of 920 new employees and 560 new housing units by 2040 is expected to happen slowly over the planning period and primarily within the Center and Corridor Community and Established Community. This growth is consistent with the uses included in the general plan and current project applications, ranging from rural residential to mixed use development with neighborhood-supporting commercial, office, and industrial employment. Earlier this year, the Village at Loomis project was approved by the town as an infill project in the Town Center area. This project included low to medium-high density residential and a variety of commercial and office uses. After the approval, there was a referendum to appeal the project; however, the MTP/SCS assumes this project, or a similar project, will happen by 2040. With no plans for expansion, the town's residential growth is limited to development of the remaining vacant rural residential lands and development in its downtown. Employment growth will be concentrated along the Interstate 80 corridor and in the downtown.

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Rocklin

The City of Rocklin is surrounded by the cities of Lincoln, Roseville, and the Town of Loomis. The city experienced significant residential growth prior to the Great Recession and, as a result, the city has built 70 percent of its existing general plan housing capacity. The City's adopted general plan (2012) assumes it will reach 100 percent of existing capacity by 2035 under the general plan's mid-range growth projections. The general plan allows for higher densities and mixed use in the downtown area. The downtown area is located within the half-mile radius of the existing Amtrak station and is designated as a Center and Corridor Community in the MTP/SCS. Roughly half of the City's residential growth in the MTP/SCS is located within established communities, which includes the I-80 commercial area. There are also three new growth areas designated as Developing Communities in the MTP/SCS, including the Highway 65 Corridor, Sunset Ranchos, and Clover Valley.

Over the last decade, the city has experienced an increase in applications for more infill-focused residential development on vacant commercial or other non-residential land. This trend, combined with the City's adopted housing element that rezoned some non-residential land to residential land, has resulted in an increase in housing capacity in the city. SACOG estimates existing general plan capacity in the city is 32,480 housing units and 34,600 employees. The MTP/SCS assumes that the City will reach the vast majority of its existing residential capacity by 2040. The city's employment centers are expected to grow significantly by 2040 but will not likely reach existing capacity until after the MTP/SCS planning period. By 2040, the MTP/SCS forecast for the city includes 8,590 new housing units and 8,200 new jobs. Over half of this housing growth will occur in existing subdivisions and infill in the Established and Center and Corridor Communities. In Established Communities, new residential growth ranges from rural residential to high density and mixed-use land uses. New employment growth includes commercial, office, research and development/tech, both primary and secondary education, and other public uses. The MTP/SCS forecasts this area will grow by 4,380 new housing units and 4,000 employees. The Center and Corridor Community is expected to grow by 500 housing units and 500 employees. This residential growth is expected to be medium to medium-high density residential, vertical mixed use, and commercial employment that will be added through small-scale infill and redevelopment.

The remaining growth is in the three Developing Communities. Sunset Ranchos is an adopted specific plan area that is currently under construction. At existing allowed capacity the plan will include a total of approximately 4,250 housing units and 1,200 jobs. The MTP/SCS forecasts that Sunset Ranchos will be built out by 2040, with only capacity for 570 employees remaining. With an average residential density of eight units per acre, this area is primarily low and medium density uses, including some neighborhood-supporting commercial and public uses. Directly west of Sunset Ranchos along Highway 65 is a planned employment center. This area could accommodate up to 5,000 employees and 1,230 units and is primarily made up of commercial, office, and research and development/tech uses. The MTP/SCS projects that this area will reach about 70 percent of its existing employment capacity by 2040. Additionally, the Highway 65 Corridor area includes existing capacity for approximately 1,200 medium-high density units, of which the MTP/SCS assumes 1,000 will be built by 2040.The final Developing Community in Rocklin is the Clover Valley Specific Plan area. Clover Valley is planned for 560 low density units, averaging four units per acre and includes some small-scale commercial and public uses. The MTP/SCS assumes that 200 of those units will be built by 2040.

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Roseville

Roseville sits at the heart of the southwest Placer employment center. For more than two decades, the city has experienced significant housing and employment growth. Employment uses have been concentrated in the areas around Interstate 80 and Highway 65. While residential uses surround these areas, most of the city's housing is located west of the Interstate 80 and Highway 65 corridors. The city has annexed lands in the western portion of the city, including the specific plan areas of Sierra Vista, Creekview, and Amoruso Ranch. These three areas are characterized in the MTP/SCS as Developing Communities. Roseville also has three areas identified as Center and Corridor Communities. The first includes the half-mile radius around the existing Amtrak station, including the Downtown Specific Plan and Riverside Gateway areas. The second two are centered on the Sunrise Boulevard and Douglas Boulevard intersection and correspond with two of the city's primary future target infill and revitalization areas. The balance of city is designated as an Established Community in the MTP/SCS, including the West Roseville Specific Plan.

With 24,800 new jobs and 21,840 new housing units, job growth is expected to outpace housing growth through 2040 in Roseville. About 20,500 employees or 82 percent of the job growth is forecasted to occur in Established Communities as existing employment areas fill in, including regional retail centers, office parks/light industrial complexes, and industrial parks. These Established Communities have additional land capacity for an additional 4,300 new employees based on existing General Plan capacity. Residential growth capacity in these Established Communities is much lower and would occur primarily through infill development. The MTP/SCS forecasts 10,930 new housing units in these areas by 2040, the majority of which is in the West Roseville Specific Plan. Redevelopment and infill, both mixed use and residential, in the Center and Corridor Communities are assumed to occur throughout the planning period. These Center and Corridor Communities are forecast for 1,060 new housing units and 2,100 new employees within the MTP/SCS planning period. With other large established employment centers in the city, it is unlikely that these areas will reach their employment capacity for some time, well beyond the current MTP/SCS planning period. Both Established and Center and Corridor Communities include residential development at a range of densities from low to high and a variety of employment uses including commercial, office, industrial, public, and mixed-use.

The MTP/SCS assumes Sierra Vista will experience substantial growth by 2040, including 6,090 new housing units, averaging 10 units per acre, and 2,000 new jobs by 2040. The plan's existing capacity includes 8,660 homes and 9,000 jobs. Housing growth in this area will range from low to high density with some mixed use. Employment uses include commercial and neighborhood-supporting public uses. Another Developing Community, Creekview, is forecasted to build all its 2,010 housing unit capacity by 2040, averaging 11 units per acre. The residential growth ranges between low to high density, while employment uses include some neighborhood-supportive commercial and public uses. The final Developing Community, Amoruso Ranch, is projected to add 1,750 new homes by 2040, most of which after 2035, and range between low and medium-high density averaging 7 units per acre.

SACOG is required to update the MTP/SCS every four years. As a result, SACOG continuously monitors development activity throughout the region to gauge implementation of the plan as well as track policy, regulatory, and market factors that could influence changes in the land use forecast in future updates. At a regional level, SACOG will monitor economic and land development trends, general location and type of housing construction, housing rezones related to the 2021-2029 Housing Element updates, what local agencies are using their SB 2 planning grant funds for, what projects use CEQA streamlining related to the MTP/SCS, employment growth, general plan updates, and new specific plans or master plans. In Roseville, the regional monitoring program will also track the challenges and opportunities of the city's Civic Lab Year 2 project on Harding Boulevard. Key issues that may influence updates to the land use forecast in Roseville include the timing and phasing of Creekview and Amoruso Ranch.

Placer (Unincorporated County)

Historically, development in unincorporated Placer County has been concentrated in rural communities, the majority of which are clustered along the Interstate 80 corridor. The MTP/SCS describes these areas as Rural Residential Communities. Clusters of more concentrated housing and employment are located near the more urban areas of the county. The areas immediately surrounding the cities of Auburn and Colfax, as well as Granite Bay, the existing Sunset industrial area, Martis Valley, and Squaw Village are all examples of this. These areas are characterized as Established Communities in the MTP/SCS. Placer County updated its General Plan in 2013 and approved several new specific plans, which will allow significant new residential and employment growth in the county. Because these are new development areas, they are characterized as Developing Communities in the MTP/SCS. These Developing Communities include the specific plans for Placer Vineyards, Regional University, Riolo Vineyards, Bickford Ranch, and Placer Ranch. The county's long-term vision for growth includes an additional new growth area, Curry Creek, located just north of Baseline Road and the Placer Vineyards plan area. This area has been identified for future growth in the general plan and, while the county's work plan includes development of a community plan for this area, this project is not currently moving forward. Therefore, Curry Creek and the remaining portions of the unincorporated county outside of the Established and Developing Communities described above, are not identified for development in the current MTP/SCS planning period.

Because of the amount of development planned in the southwest portion of the county, Placer County, in partnership with South Placer Regional Transportation Authority, Placer County Water Agency, the City of Lincoln, CA Department of Fish and Wildlife, U.S. Fish and Wildlife Service, National Marine Fisheries Service, the U.S. Army Corps of Engineers, U.S. Environmental Protection Agency, and the California Regional Water Quality Control Board are developing the Placer County Conservation Plan

(PCCP). The proposed PCCP is a Habitat Conservation Plan (HCP) under the Federal Endangered Species Act and a Natural Community Conservation Plan (NCCP) under the California Natural Community Conservation Planning Act. When adopted, the plan would allow local entities to issue state and federal permits, streamlining a currently very lengthy process.

Placer Vineyards is located on the Sacramento-Placer county line. At existing allowed capacity this plan could accommodate 6,000 employees and 14,130 housing units, averaging 7 units per acre. Employment uses are mostly neighborhood serving and include commercial, office, industrial, and public uses. Residential uses range from low density to medium-high density, including mixed use. Regional University, located adjacent to the Roseville city limits, is planned for 3,230 new housing units and about 1,400 new jobs at existing allowed capacity. This plan includes land for a new university campus, which is where the majority of the jobs are expected to come from, along with some neighborhood-serving retail and commercial uses. Because the plan includes a major university campus and it is adjacent to a more urban part of the county, Roseville, the residential uses are largely medium, medium-high, and high density, not including the on-campus housing, an average 13 units per acre. Placer Ranch is located at the Roseville city boundary just north of West Roseville, east of Amoruso Ranch, and west of Highway 65. The Public Review Draft allows for 5,830 homes and 20,160 jobs. Employment growth will include a planned university campus in the Placer Ranch portion to the south east and mixed use east of the university. The residential uses include low to high density, including some mixed use, averaging 8 units per acre. These plans represent a shift in the traditional type of development Placer County has done historically.

Riolo Vineyards is a Developing Community located between Placer Vineyards and the existing rural community located around PFE Road and Walerga Road. This plan, at existing allowed capacity will include 938 housing units, averaging 4 units per acre, and about 166 jobs, mostly neighborhood service commercial and public uses. The MTP/SCS assumes all 930 units will be built by 2040. Bickford Ranch is in a primarily rural residential area, east of Lincoln. This plan has capacity for 1,890 homes, averaging three units per acre, and about 50 employees that are mostly neighborhood-supporting commercial and public uses. The MTP/SCS assumes 1,880 units will be built by 2040.

In total, the MTP/SCS forecast for unincorporated Placer County includes 13,410 new housing units and 17,230 new jobs by 2040. Existing General Plan capacity in Established Communities is estimated at 30,650 new homes and 72,310 new jobs. An emerging growth area within the Established Community of Placer County is the Highway 49 corridor north of the City of Auburn. Uses in this area include the continued growth of County government offices, neighborhood-serving commercial, regional retail, office, and light industrial.

Rural Residential Communities have a large amount of capacity and if built out could add over 24,000 new rural residential homes and 19,000 new jobs. Rural Residential Communities in Placer County are expected to experience low amounts of growth, approximately 1,290 new housing units and 400 new jobs by 2040. The MTP/SCS forecast assumes relatively small amounts of new rural residential homes and neighborhood-supporting commercial and public uses to be constructed in the region by 2040, as compared to the existing allowed capacity. This is in part due to historical building rates combined with changing demographics, which suggest a higher percent of the population will choose to live on smaller lots or in attached homes near existing jobs, services, and with more transportation choices. In Placer County, this is also in part due to potential wildfire risks in these areas.

Over half of the new homes are located within the southwest Placer Developing Communities by 2040. The MTP/SCS assumes 3,700 units and 800 jobs in Placer Vineyards by 2040. The MTP/SCS assumes 1,000 units and 500 jobs in Placer Ranch/Sunset Area Plan by 2040. Regional University includes 1,450 new housing units and 350 new jobs. The MTP/SCS forecast for both Placer Ranch and Regional University includes some portion of university development by 2040. The MTP/SCS forecast includes 930 new housing units and 50 new employees in Riolo Vineyards. By 2040, the MTP/SCS projects growth of 1,880 new homes and 50 employees in Bickford Ranch.

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SACRAMENTO COUNTY

Citrus Heights

Citrus Heights is surrounded on three sides by existing unincorporated Sacramento County development and to the north by existing Roseville Development. With no outward growth potential, much of the city is characterized as Established Community in the MTP/SCS. One large infill opportunity in the Established Community area is the Mitchell Farms Subdivision on the golf course located near Greenback Lane and Sunrise Boulevard. The city has also identified two corridors in the city for targeted redevelopment and revitalization. These areas, the Auburn Boulevard corridor and the Greenback Lane corridor, make up the Center and Corridor Communities in the MTP/SCS within the city. The city will use the approved Boulevard Plan, and the future Sunrise Mall Specific Plan to encourage redevelopment and infill in these Center and Corridor Communities.

The MTP/SCS forecast for Citrus Heights is 1,500 new housing units and 3,420 new employees by 2040. Of this, 60 percent of the new jobs and 60 percent of the new housing units are expected to occur in Center and Corridor Communities, with the remaining 40 percent of new jobs and 40 percent of now housing units in Established Communities, including development of the golf course property noted above and accessory dwelling units on residential lots of over 5,500 square feet. Generally, new growth in the city includes a range of residential development from very low to medium-high density, mixed use development, and commercial, office, and public uses. The city's jobs/housing balance of 0.6 in 2016 will remain unchanged in 2040.

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Elk Grove

Over the last two decades, Elk Grove has experienced significant residential growth. Much of the city is considered an Established Community in the MTP/SCS, except for the rural residential areas, historic Elk Grove, and the newest and not yet built planning areas. The northeast corner of Elk Grove has historically consisted of rural residential uses and is intended for continued rural residential use in the city's general plan. As a result, this area is characterized as a Rural Residential Community in the MTP/SCS. Old Town Elk Grove is identified as a Center and Corridor Community in the MTP/SCS, consistent with the city's revitalization effort in its Old Town Elk Grove Special Planning Area. Laguna Ridge Specific Plan is part of the Established Community in the MTP/SCS. Three new growth areas in the city, all located within the southern portion of the city adjacent to Laguna Ridge, represent the next increment of new growth for the city. These Developing Communities in the MTP/SCS include the adopted Lent Ranch Marketplace Special Planning Area, the adopted Southeast Policy Area Community Plan, and the Sterling Meadows policy area. In 2010, Elk Grove completed a market study to identify economic development opportunities and land use needs for the city. The study supports the city's strong desire to add more jobs to help balance the currently housing-concentrated character of the city. Employment growth has been a strong focus for Elk Grove over the last five years. The Southeast Policy Area, the master plan for which was adopted in 2014, is identified as an "employment-oriented development" that is intended to support the development of employment uses.

By 2040, the MTP/SCS forecast for Elk Grove adds 12,870 new housing units and 15,750 new employees to the city. Approximately 54 percent of these housing units and 54 percent of the employees are building out the city's Established Communities in a range of residential densities from very low to high, including mixed use, and accessory dwelling units on residential lots of over 5,500 square feet. Employment uses include commercial, office, light industrial, medical, and public development. The Laguna Ridge Specific Plan will build out its residential capacity by 2040, including 3,840 new units in the MTP/SCS planning period. Approximately 42 percent of the housing growth and 44 percent of the employment growth, will occur in the city's Developing Communities. The Lent Ranch Special Planning Area is primarily a plan for new commercial and office employment uses that could accommodate 4,050 employees and 280 new multi-family/mixed use units at existing allowed capacity, averaging 24 units per acre. The MTP/SCS forecast for this Developing Community is for 3,000 new employees and to build out the 280-unit housing capacity at an average density of 24 units per acre. The Southeast Planning Area plan includes capacity for 4,040 homes and 18,640 commercial, office, light industrial, mixed use, and neighborhood-supporting public jobs. The MTP/SCS forecasts 4,000 new homes and 3,990 new jobs in this area by 2040. Sterling Meadows, a Developing Community situated in between Southeast Planning Area and Lent Ranch, is a residential-only community planned for 1,180 new units ranging from low to high density. The MTP/SCS forecast assumes all 1,180 units will develop by 2040.

While much of the recent development in Elk Grove has been residential in nature, the city is projected to capture a greater share of the region's employment over the MTP/SCS planning period. About six percent of the regional employment growth is forecasted in Elk Grove. This is supported by the city's effort to attract more jobs and by the fact that it has begun to see some of this employment growth in the recent arrivals and expansions of several medical facilities and state jobs. The MTP/SCS forecast provides a jobs/housing ratio of 1.2 for the growth in the city. This will help improve the city's jobs/housing balance from 0.8 today to 0.9 in 2040.

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Folsom

Folsom's growth in the last decade has been a balance of employment and housing. The city is home to several major employers and, along with the rest of the region, experienced robust residential growth in the decade prior to the recession. Much of the existing city north of Highway 50 is characterized as an Established Community in the MTP/SCS. The city's historic downtown and three light rail station areas (within a half mile boundary of each) are identified as Center and Corridor Communities in the MTP/SCS. The City updated its General Plan in August of 2018, which focusses growth around light rail, within a newly created mixed use overlay along East Bidwell, and in the area south of Highway 50. The city adopted a specific plan for the area just south of Highway 50 in 2011, and annexed the area, in 2012. This Folsom Plan Area is designated as a Developing Community in the MTP/SCS. The specific plan includes a mix of housing and employment that, at existing allowed capacity, could include 11,340 new housing units and 13,620 new employees. Employment uses include commercial, office, light industrial, and public.

Existing general plan capacity within the city is estimated at 15,160 new housing units and 19,360 new jobs. Established Communities, if existing general plan capacity is reached, would add 5,050 new jobs and 3,070 new housing units. Existing capacity in Center and Corridor Communities would add 450 new housing units and 690 new employees. The remaining capacity comes from the Folsom Plan Area Developing Community as described above.

In total, the MTP/SCS forecast for Folsom includes 10,470 new housing units and 6,300 new jobs by 2040. Of this, 2,700 new jobs are in Established Communities. The majority of the new jobs are commercial, office, light industrial and public uses filling in the existing employment centers along Highway 50 and East Bidwell Street. Established Communities also add 3,070 new housing units. Residential growth includes filling in the subdivisions in the eastern portion of the city, select infill parcels, and accessory dwelling units on lots over 5,500 sqft. New development in Center and Corridor Communities includes 1,600 new jobs and 700 new housing units. Many of the new jobs in Center and Corridor Communities come from larger commercial, office, and industrial infill opportunities around some of the light rail stations and infill mixed use opportunities in the historic downtown and along Bidwell. The Folsom Plan Area south of Highway 50 includes 6,700 new housing units and 2,000 new employees in the MTP/SCS forecast.

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At a regional level, SACOG will monitor economic and land development trends, general location and type of housing construction, housing rezones related to the 2021-2029 Housing Element updates, what local agencies are using their SB 2 planning grant funds for, what projects use CEQA streamlining related to the MTP/SCS, employment growth, general plan updates, and new specific plans or master plans. In Folsom, the regional monitoring program will also track the challenges and opportunities of the city's Civic Lab Year 2 project on East Bidwell St between Riley and Highway 50 as well as the pace, phasing and type of housing and employment development south of Highway 50.

Galt

The City of Galt is centered on Highway 99 at the southern edge of Sacramento County. In the past two decades, the city has experienced moderate housing and employment growth. Most of the area within the city limits is characterized as an Established Community in the MTP/SCS. These Established Communities have the capacity to add 6,180 jobs and 1,850 new housing units, primarily through build out of existing subdivisions, some infill, and accessory dwelling units on lots over 5,500 sqft. The majority of potential new jobs are industrial uses in the existing industrial complexes located north of Elm Avenue and new commercial uses along Highway 99. The city's historic downtown and the adjacent Lincoln Way and C Street corridors are identified as Center and Corridor Communities in the MTP/SCS, as is part of the Twin Cities Road area. These Center and Corridor Communities have the capacity to add about 140 new housing units and 1,390 new jobs. Apart from the small rural residential community just north of the Twin Cities Road, most of the city's Sphere of Influence (SOI) is characterized as a Developing Community in the MTP/SCS, as is the recently annexed Eastview Specific Plan. These areas have the capacity for 23,810 jobs and 6,900 new units. Much of the new employment capacity is concentrated along Highway 99 and is a targeted effort by the city to provide economic development opportunities in the city that will help improve the city's currently low jobs/housing ratio.

In total, the MTP/SCS forecast for Galt includes 2,980 new housing units and 3,100 new jobs by 2040. Of this, 1,850 new housing units and 2,000 new employees are in Established Communities; 135 new housing units and 500 new employees are in Center and Corridor Communities. Employment uses include a combination of neighborhood serving commercial, some office, educational, and light industrial uses. Finally, the MTP/SCS forecast includes 1,000 new housing units and 600 new employees are in the Eastview Specific Plan and SOI Developing Community.

SACOG is required to update the MTP/SCS every four years. As a result, SACOG continuously monitors development activity throughout the region to gauge implementation of the plan as well as track policy, regulatory, and market factors that could influence changes in the land use forecast in future updates. At a regional level, SACOG will monitor economic and land development trends, general location and type of housing construction, housing rezones related to the 2021-2029 Housing Element updates, what local agencies are using their SB 2 planning grant funds for, what projects use CEQA streamlining related to the MTP/SCS, employment growth, general plan updates, and new specific plans or master plans. In Galt, the regional monitoring program will monitor the pace of development in the Eastview Specific Plan area, the increasing infill and redevelopment activity, and the build out of the industrial area.

Isleton

The city of Isleton is located in the southernmost portion of Sacramento County in the Sacramento River Delta. Existing general plan capacity in Isleton is 510 housing units and 170 jobs. The entire city is characterized as an Established Community in the MTP/SCS, including the Villages on the Delta project located in the eastern portion of the city at 6th street and H Street.

In total, the MTP/SCS forecast for the city includes 60 new low to medium-high density housing units and 20 new neighborhood-supporting commercial and public jobs by 2040.

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Rancho Cordova

Rancho Cordova has emerged as a regional job center over the past twenty years, with a high jobs/housing ratio. During that time, housing development did not keep up with employment growth. The city's general plan, adopted in 2006, places heavy emphasis on improving jobs/housing balance. In support of this goal, several adopted and proposed specific plans include the goal of providing housing for existing and future workers in Rancho Cordova. These adopted and proposed specific plans are characterized as Developing Communities in the MTP/SCS and include the following plan areas: Sunridge, Ranch at Sunridge, Suncreek, and Rio Del Oro. The City also has two other new growth areas, Arboretum and Westborough, which are not identified for growth in the MTP/SCS by 2040. Additionally, the city has four light rail stops within the city limits that, along with the entire Folsom Blvd corridor, are part of the city's adopted Folsom Boulevard Specific Plan. The Folsom Boulevard Specific Plan supports high density and mixed-use development and redevelopment along the corridor, which is identified as a Center and Corridor Community in the MTP/SCS. The remaining land within the city is characterized as an Established Community in the MTP/SCS.

At existing capacity, the city allows for a total of 107,560 jobs and 64,400 housing units. Established Communities have the capacity to add 15,360 new jobs and 1,060 new housing units. These new commercial, office, and industrial jobs are primarily located in existing office park and industrial complexes. New housing capacity in the Established Community comes from building out newer subdivisions, accessory dwelling units on lots over 5,500 sqft, and more traditional infill. The Centers and Corridor areas, due to their higher densities and office and commercial mixed use land designations, has the potential to add 5,460 new jobs and 1,660 new housing units.

Sunridge is the only Developing Community in the city that has started building. At existing allowed capacity this area will include 8,040 housing units and 2,550 jobs, including new commercial and public uses and a range of new housing types, averaging eight units per acre. In the middle of the Sunridge Specific Plan area is another Developing Community, the Ranch at Sunridge, which proposes to add 1,650 new homes and about 310 new jobs. This plan includes mostly residential uses with some supporting commercial and public uses. Directly south of Sunridge and the Ranch at Sunridge is Suncreek. This recently adopted specific plan has capacity for 4,890 homes averaging 8 units per acre, and 2,380 jobs. Like its surroundings, this plan is mostly residential and includes some neighborhood-serving commercial and public employment uses as well. Heading back north, just above Douglas Road, is the proposed Rio Del Oro Specific Plan. This is the largest Developing Community in the city. Located adjacent to the eastern edge of the city's existing industrial complex areas, this plan is proposed to expand those employment uses and add significant housing. In total, this proposed plan would add 15,090 new jobs and 12,190 new housing units, averaging 6 units per acre. The western portion of the plan includes all types of employment uses, primarily office and light industrial. New housing growth also includes a wide range of housing types from low to high density.

The MTP/SCS forecast for the city includes a total of 19,500 new jobs and 15,880 new housing units by 2040. Rancho Cordova is expected to increase its share of both the region's housing and employment by 2040, also slightly improving its high jobs/housing ratio from 2.2 in 2016 to 1.8 in 2040. The vast majority of new housing growth, 13,150 units, is in Developing Communities. However, these areas account for significantly less of the city's MTP/SCS employment forecast. Only about 16 percent of new jobs, or 3,200 jobs, in the city will be in Developing Communities. Because many of the plans in these areas are housing-focused, it is likely that the housing units will begin building before the employment uses. Additionally, the city has existing employment centers that will capture much of the estimated employment growth. Established Communities make up two thirds of new employment growth, or 13,000 employees, and 7 percent of new housing growth, or 1,070 units. The Center and Corridor Community includes the remaining 3,300 new jobs and 1,650 new housing units within the city's MTP/SCS forecast by 2040.

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Sacramento

The City of Sacramento is centrally-located within Sacramento County and is the largest city in the SACOG region, with 29 percent of the region's jobs and 21 percent of the region's housing units currently. The city most recently completed an update to its general plan in 2015. The City's policy is to update its General Plan every five years and it is currently undergoing another update, which will push the planning horizon from 2035 to 2040. The 2015 plan aims to accommodate substantial population growth, largely through infill, reuse, and redevelopment strategies. The general plan identifies opportunity areas throughout the city for significant changes in land use and increased densities. New housing and jobs will be distributed among activity centers of various sizes (neighborhood, sub-regional, and regional), transportation corridors, and new growth areas. The activity centers identified in the city's general plan generally correspond with the MTP/SCS community types. Before the Recession, the majority of the city's employment and residential growth occurred in the North Natomas community and, as a result, residential uses in this area are largely built today. For this reason, North Natomas is included along with the communities of South Natomas, North Sacramento, Land Park, Pocket, South Sacramento, and Fruitridge/Broadway as having most of their land area in Established Communities in the MTP/SCS.

The city has three new growth areas within the current city limits. These areas include the Greenbriar Specific Plan, the recently annexed Panhandle development, and the Delta Shores Specific Plan. Delta Shores and the Panhandle are identified in the MTP/SCS as Developing Communities. However, because of the planned light rail extension, the Greenbriar Specific Plan is considered a Center and Corridor Community in the MTP/SCS. While most jurisdictions in the region are described as having Established Communities and Developing Communities as their primary community types and growth areas, the City of Sacramento is unique in that Center and Corridor Communities cover much of the city and are the locations where most new growth is concentrated. Consistent with the city's infill-focused general plan and the recently adopted Central City Specific Plan, the downtown area and surrounding neighborhoods have seen significant revitalization in the form of infill and redevelopment, including mixed use. South and east of downtown, infill development has also occurred, albeit on a smaller scale. The entire central city area, along with areas covered by a half-mile buffer around existing and proposed light rail stations, generally make up the designated Center and Corridor Communities in Sacramento.

For discussion purposes these Center and Corridor Communities are grouped into the following six subareas: (1) the central city, covering the area from Broadway to the American River and from the Sacramento River to Alhambra Boulevard., (2) the existing south-line light rail stations, (3) the proposed south-line light rail extension stations, (4) the Folsom-line light rail stations, (5), the northeast line light rail stations, and (6) the proposed north airport-line light rail stations.

The central city Center and Corridor Community is the urban center of the region, encompassing downtown Sacramento and including the State Capitol. This area includes many of the identified city opportunity areas, including the central business district, R street, Broadway, and the 12th, 16th, 19th, and 21st Street corridors. As noted above, these areas have seen an influx of high density residential and mixed use projects in recent years, including the development of a downtown sports and entertainment complex at Downtown Commons. This area also includes the city's largest redevelopment opportunity, the Railyards project, where construction is expected soon. Located directly north of the Railyards is the River District area which is also planned for significant growth and revitalization, including the Township 9 development and the Twin Rivers public housing project. Somewhat unique in the region, the central city has capacity for and plans to build new office, residential, and mixed-use buildings that exceed three and four stories. In the downtown area, it is possible that new mixed use and high density housing projects could range from four to 25 stories. Most new office buildings are also likely to build in that same range; however, there is no height limit on new office buildings in the downtown area. Collectively, this Center and Corridor Community has the potential capacity to add 41,300 new jobs and 26,000 new homes. This would more than double the amount of existing housing units in the central city today.

The existing south-line light rail stations span from Broadway to Consumnes River College and include portions of Florin Road just outside the half-mile station area. The Folsom-line includes station areas from 4th Street to College Greens within the city limits. The northeast-line includes stations from the American River to Watt Avenue in the city limits. The proposed airport-line will include a number of stations beginning near West El Camino Avenue and extending to Greenbriar in the city limits. Similar to the central city Center and Corridor Community, these communities overlap with a number of the city's opportunity areas. The city also has a number of approved plans for various areas within these Center and Corridor Communities, including: Crocker Village, 65th Street Transit Village, Swanston Transit Village, and the still in progress West Broadway Specific Plan. The city's general plan and infill programs further support development in these areas. Together, the Center and Corridor Communities outside of the central city have the potential to add about 28,000 new employees and 30,800 new jobs.

In total, the MTP/SCS forecast includes 73,510 new housing units and 56,210 new employees by 2040 in the City of Sacramento. Approximately 32,210 new employees and 48,510 new housing units are in Center and Corridor Communities, much of it in the central city area. Adding significant new housing to the central city area will provide a better jobs/housing ratio and will help in reducing regional VMT. About 36 percent of the city's MTP/SCS employment growth and 25 percent of the housing growth is in Established Communities. The housing growth assumed for Sacramento's established communities includes scattered infill sites of varying densities, the continued buildout of North Natomas, and accessory dwelling units on parcels of 5,500 sqft or higher. Most of the employment growth is either neighborhood-serving commercial, office, and public uses, hospital and college expansions, as well as new industrial/office uses that are mostly concentrated in the existing industrial center in the northeast and southeast portions of the city. The Delta Shores Developing Community plans for 4,900 housing units from low to high density averaging 16 units per acre. The plan has a significant amount of land planned for commercial development and the MTP/SCS assumes there will be 4,000 employees by 2040. The Panhandle is a Developing Community that was recently approved and annexed by the city. The MTP/SCS assumes 1,100 of the 1,620 homes planned for this area build by 2040.

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Sacramento (Unincorporated County)

Unincorporated Sacramento County is the most urbanized of the unincorporated counties in the Sacramento region, with 24 percent of the region's existing housing and 19 percent of the region's existing employment. The majority of its population resides in the Urban Policy Area (UPA), which lies within the Urban Services Boundary (USB) or the ultimate boundary for urbanization in the unincorporated county. Sacramento County completed a general plan update in 2011 that facilitates infill and revitalization in targeted commercial corridors within the existing UPA and employs a smart growth management framework in considering proposed UPA expansions. Under the county's general plan, the UPA may be expanded if proposed development projects are consistent with a new growth management framework, which is built upon the relationship between land use and transportation to achieve goals and requirements relative to air quality, transportation, land use, infrastructure, and GHG emissions.

Today, most of the communities within the UPA are identified in the MTP/SCS as Established Communities. Most of these are residential in character (e.g., Arden Arcade, Carmichael, Cordova, Fair Oaks, North Highlands, Rancho Murieta, Vineyards Community Plan, and South Sacramento) and are projected to receive relatively small amounts of future growth consistent with existing plans that aim to retain the character of the neighborhoods. Others are important and growing employment centers (e.g., Sacramento International Airport, Metro Air Park, Aerojet, McClellan, and Mather). Together, these Established Communities contain 78 percent of existing housing and 54 percent of existing jobs in the unincorporated county today.

Running between and through these communities are miles of major roadways bordered primarily by commercial land uses. The county's general plan update identifies 13 commercial corridors for varying levels of additional commercial and residential development through reinvestment and redevelopment. Given the county's planning efforts underway to allow for additional growth in these corridors, they are identified in the MTP/SCS as Center and Corridor Communities. The corridors include Auburn Boulevard, Fair Oaks Boulevard in Arden Arcade, Fair Oaks Boulevard in Carmichael, Fair Oaks Boulevard in Fair Oaks, Greenback Lane in Orangevale, Watt Avenue and Fulton Avenue in Arden Arcade, North Watt Avenue and West of Watt in North Highlands, Florin Road and Stockton Boulevard in South Sacramento, and the unincorporated portions of Folsom Boulevard, where the four light rails stations offer significant opportunity for transit-oriented and mixed use development. The county has either completed or initiated planning processes for all of these corridors, with the goal of promoting economic revitalization within the corridors themselves, as well as for the surrounding communities and for the county as a whole.

Outside of the USB, land uses are primarily agricultural or agricultural-residential. The latter land use is clustered in the communities of Orangevale in the north county, and Alta Mesa, Clay, Franklin, Herald, Sloughhouse, and Wilton in the south county. These communities are identified in the MTP/SCS as Rural Residential Communities. The county's general plan contains policies to preserve these historic communities without encouraging excessive growth due to the high cost of providing services to these remote locations.

Outside of Established Communities and Center and Corridor Communities, new growth areas in unincorporated Sacramento County are identified in the MTP/SCS as Developing Communities. These Developing Communities include the following adopted plans: Elverta Specific Plan in northern Sacramento County, the Glenborough at Easton Specific Plan in eastern Sacramento County, the Florin Vineyards Specific Plan, North Vineyard Station Specific Plan, Vineyard Springs Comprehensive Plan, Mather South Master Plan, and Cordova Hills in the southeast county.

The county's long-term vision includes additional new development along Jackson Highway, including Jackson Township Specific Plan, West Jackson Specific Plan, and Newbridge Specific Plan. Outside of the current UPA and USB, in the northwestern portion of the county, the county is also currently processing an application for two projects identified as the North Natomas Precinct and the Upper Westside Specific Plan. While many of these areas are consistent with the region's long term growth strategy, the Blueprint, and are in varying stages of the local entitlement process, they are not yet approved by the county. These areas and the remaining areas of the unincorporated county not described as Established, Developing, or Rural Residential Communities are not identified for development within the current MTP/SCS planning period.

The county adopted the South Sacramento Habitat Conservation Plan (SSHCP) in October of 2018. The SSHCP will consolidate environmental efforts to protect and enhance wetlands (primarily vernal pools) and upland habitats to provide ecologically viable conservation areas. It will also minimize regulatory hurdles and streamline the permitting process for development projects. Sacramento County partnered with the incorporated cities of Rancho Cordova, and Galt, as well as the Sacramento Regional County Sanitation District, Sacramento County Connector JPA, and Sacramento County Water Agency, to further advance the regional planning goals of the SSHCP. The Study Area excludes the City of Sacramento, the City of Folsom, the City of Elk Grove, the Sacramento-San Joaquin Delta, and the communities of Rancho Murieta and Wilton.

By 2040, the MTP/SCS forecasts that unincorporated Sacramento County will continue to be the most urbanized county in the region. The MTP/SCS forecasts 37,230 new housing units and 47,050 new employees by 2040 in areas of the unincorporated County that have existing allowed capacity for 136,210 new housing units and 238,230 new employees. Within the existing urban core, most new growth will occur through limited infill and redevelopment in Center and Corridor Communities, including 45 percent of housing growth and 47 percent of employment growth. By 2040, the MTP/SCS forecasts 16,950 new housing units and 22,040 new employees within Center and Corridor Communities. This new growth will take the form of commercial, office, and industrial employment uses and new housing growth will be predominantly medium-high to high density and/or mixed-use.

The vast majority, 82 percent, of the housing growth in Centers and Corridors is projected for three general areas: light rail stops, the area west of the northern Watt Avenue surrounding the McClellan employment center, and transportation corridors (Stockton, Franklin, Florin) in southern Sacramento County. The remaining 18 percent of the forecasted housing is in relatively small amounts along seven other corridor segments throughout the county. In the county's Established Communities, the MTP/SCS forecasts 7,230 new housing units and 23,000 new employees by 2040. Residential growth in Established Communities is expected to occur mostly through small-scale infill of existing low density residential lots and accessory dwelling units on lots of 5,500 sqft or more, in line with the county's general plan. Employment growth in Established Communities is expected to occur through a combination of new construction and intensification of commercial, industrial, and public uses in existing employment areas, including Sacramento International Airport, Metro Air Park, and McClellan Park.

In the Developing Communities of the unincorporated county, the MTP/SCS forecasts 12,900 new housing units and 1,710 new employees by 2040. Elverta, the only Developing Community in the north, includes 2,500 new housing units and 200 new employees by 2040 out of a total planned capacity of 5,630 new housing units and 400 new employees. This community is planned for an average residential density of five units per acre with neighborhood-supporting commercial and public uses. The other Developing Communities identified in the MTP/SCS are all located south of Highway 50. Of these, three are located south of State Route 16 in the Vineyard Community. North Vineyard Station, which recently began construction last decade, includes 2,400 new units and 250 jobs by 2040, out of a planned capacity of 6,060 housing units and 560 employees. Growth in this Developing Community is predominantly residential, at an average density of seven units per acre, supported by neighborhood commercial and public uses. The Vineyard Springs Comprehensive Plan began building in the early 2000's and is projected to include 500 new dwelling units and 100 new employees by 2040, out of a total planned capacity of 6,540 housing units and 760 employees. The average residential density is four units per acre and the plan includes neighborhood-serving commercial and public uses. The Florin Vineyard Community Plan, which has not yet begun construction, fills in the "gap" between a number of specific plans in the Vineyard area. This area, planned for a capacity of 9,920 housing units and 6,240 employees, is expected to grow by 480 housing units and 100 employees during the MTP/SCS planning period. Uses in the Florin Vineyard Community Plan range from residential development at an average density of six units per acre to neighborhood serving-commercial and public uses to office and industrial uses.

Along the Jackson Corridor, the Mather South Specific Plan, located north of Jackson Highway and west of Sunrise Boulevard, plans for a mixed-use community that would accommodate a total capacity of 3,530 housing units and 5,080 employees. Of this, the MTP/SCS forecasts construction of 1,810 new housing units and 260 new employees by 2040. Northeast of Mather South, the MTP/SCS also forecasts growth within the Glenborough at Easton Specific Plan. This Developing Community is a reuse of the eastern portion of the Aerojet campus along Highway 50, east of the city of Rancho Cordova and southwest of the city of Folsom. The portion of the project known as Easton covers the half-mile area around the Hazel light rail station and is therefore identified in the MTP/SCS as part of the county's Center and Corridor Communities. The Glenborough Specific Plan was adopted by the county as a mixed use residential community planned for a total of 3,240 housing units and 1,800 employees (excluding the Easton transit-oriented development). Due to its prime location along Highway 50 and Folsom

Boulevard, its proximity to several light rail stations, and its location between major employment centers in Rancho Cordova and Folsom (and Aerojet itself), Glenborough is forecasted in the MTP/SCS to build 3,230 new housing units and 800 new jobs by 2040. Residential densities of this Developing Community average eight units per acre and employment land uses include commercial, office, and neighborhood-supporting public uses. Cordova Hills, the last Developing Community assumed along Jackson corridor area, sits just outside the City of Rancho Cordova. The MTP/SCS forecast assumes 2,000 new homes and no jobs in this community by 2040. The approved capacity for the project is 8,000 homes and 13,560 jobs.

Rural Residential Communities in unincorporated Sacramento County are expected to experience low amounts of growth, approximately 150 new housing units and 300 new jobs by 2040. The MTP/SCS forecast assumes relatively small amounts of new rural residential homes to be constructed in the region by 2040. This is in part due to changing demographics, which suggest a higher percent of the population will want and need to live on smaller lots or in attached homes near existing jobs, services, and with more transportation choices.

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SUTTER COUNTY

Live Oak

Development in Live Oak is primarily suburban and rural-style housing with small-scale employment and commercial uses along Highway 99. The city's general plan aims to maintain the small-town character of Live Oak, promote a balance of jobs, housing and services, and revitalize the existing downtown area. Most of the developed areas of the city are characterized as an Established Community in the MTP/SCS, with the exception of the Highway 99 corridor which is designated as a Center and Corridor Community. Within these two communities, the city has an estimated capacity for an additional 3,410 new employees and 2,130 new housing units. Additionally, in recent years, the city has annexed large areas into the northern part of the city. The general plan includes a significant amount of new housing and employment capacity in these areas and the city's Sphere of Influence (SOI). These recent annexation areas and the remaining SOI are not identified for development within the current MTP/SCS planning period.

In total, the MTP/SCS forecast for Live Oak includes 600 new employees and 1,000 new housing units. Just over half of this new employment growth is in Center and Corridor Communities. This Center and Corridor growth of 40 new housing units and 300 new employees consist of primarily low and medium-high density housing, including some mixed use, and commercial and office uses. The remaining housing and employment growth comes from Established Communities. Most of this is in the form of new neighborhood-supporting retail, commercial, and office uses as well as new public uses. The majority of the housing growth, 97 percent, is in Established Communities and is largely a result of building out many of the newer existing subdivisions.

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Yuba City

As the county seat, Yuba City functions as the trading and service center for the surrounding agricultural area and maintains a balanced jobs/housing ratio of 1.1 in 2016. Much of the city is designated as an Established Community in the MTP/SCS with the exception of the city's downtown area and the commercial area centered on Highway 20 and Highway 99, which is characterized as a Center and Corridor Community in the MTP/SCS. Most of the additional capacity in the existing city limits is within the Established Community areas, where 9,620 new jobs and 5,770 new housing units could be accommodated based on existing General Plan capacity. The majority of this employment capacity is in commercial and industrial uses, while the housing growth is largely building out newer low to medium-high density existing subdivisions, accessory dwelling units on lots of 5,500 sqft or higher, and limited mixed use. Just outside the city limits, along the east side of Highway 99, some established low density residential development exists. This area is considered an Established Community in the MTP/SCS forecast for Yuba City as the area is supported by city services even though it has not been annexed into the city. The Center and Corridor Community area has existing general plan capacity for an additional 90 new homes and 2,250 new jobs. These jobs are also mainly commercial, office, and industrial uses and the housing is mostly medium-high density with limited mixed use. Directly adjacent on the west side of Highway 99, just outside of the city limits, new housing and employment uses are planned. This area is identified as a Developing Community in the MTP/SCS. Employment uses will include commercial, office, and industrial uses while the residential uses planned are low and medium density. At existing allowed capacity, the South SOI/Highway 99 corridor area could include a total of 1,780 jobs and 2,540 housing units. The city's general plan acknowledges and plans for future growth to occur primarily through village-style development in its sphere of influence (SOI). As part of general plan implementation, the city developed a new specific plan for the portion of the SOI located near the southwest corner of the existing city limits. This adopted specific plan, Lincoln East, along with the remaining SOI area is not identified for development within this MTP/SCS planning period. The city also began preparing a specific plan, Bogue Stewart, for the area south of the city and not in the current SOI. This project is not identified for development in the MTP/SCS by 2040.

Moderate, balanced growth is anticipated for Yuba City through 2040. The city is expected to maintain its share of the regional housing and employment and its well-balanced jobs/housing ratio through 2040. The MTP/SCS forecast for Yuba City includes 7,360 new jobs and 5,290 new housing units. The majority of this growth, about 76 percent of employment and 95 percent of housing, is within Established Communities. As noted above, this employment growth is primarily commercial and industrial uses and the residential growth which consists primarily of building out newer low and medium density existing subdivisions, accessory dwelling units, and limited mixed use. The Center and Corridor Community includes 1,590 new jobs and 88 new housing units within the MTP/SCS planning period. The remaining growth comes from the South SOI/Hwy 99 Corridor Developing Community, which includes 200 new units and 200 new jobs in the MTP/SCS by 2040.

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Sutter (Unincorporated County)

Development activity in unincorporated Sutter County has historically been focused within the spheres of influence of Live Oak and Yuba City and, to a lesser extent, in a number of smaller rural towns throughout the unincorporated area. These towns, Sutter, Meridian, Robbins, Tudor, Nicolas, East Nicolas, and Rio Oso make up the Established Communities in unincorporated Sutter County. The county has one large new growth area, located on the Sacramento-Sutter County line along Highway 99, with an adopted specific plan. The Sutter Pointe Specific Plan area is designated as a Developing Community in the MTP/SCS. The county's general plan, adopted in 2011, directs most new growth to this area and aims to preserve much of the county in agricultural uses. The county general plan does identify two new commercial/industrial employment areas in the county, one north of Yuba City and one south. These areas, and the remaining areas within the unincorporated county, are not identified for development in the MTP/SCS. However, agricultural-related housing and employment is likely to occur in these areas and is supported by the MTP/SCS environmental sustainability policies.

The Sutter Pointe Developing Community represents almost all of the employment and housing capacity in the county. At existing allowed capacity, this plan includes 17,500 housing units and 55,040 employees. The majority of these employment uses are industrial, though the plan does also include commercial and public uses. The average residential density planned is eight units per acre. While the MTP/SCS forecast includes 94 percent of the county's new employment and 83 percent of new housing to occur within this Developing Community by 2040, that growth represents only a small portion of the existing allowed capacity in the specific plan. The MTP/SCS forecast includes 1,600 new employees and 1,800 new housing units in unincorporated Sutter County by 2040. Of this, 1,500 employees and 1,500 housing units are in Sutter Pointe. The remaining 100 jobs and 300 housing units in the MTP/SCS forecast are located in Established Communities, where continued low density development and neighborhood-serving commercial and public uses are planned.

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Sutter, the timing and phasing of Sutter Pointe is the biggest factor that could change the land use forecast in the next update.

YOLO COUNTY

Davis

The City of Davis has limited new growth areas and, as such, is characterized largely as an Established Community in the MTP/SCS. The exceptions to this rule are the area within a half-mile of the existing Amtrak station, the surrounding downtown core area (Core Area Specific Plan), and the Nishi development, which are characterized as a Center and Corridor Communities. Measure R in Davis requires voter approval for proposed changes to agricultural land use designations. The annexation for the 44-acre Nishi property was approved by Davis voters in 2018. This site includes a capacity for 700 medium-high density housing units oriented towards students.

In addition to the Nishi site noted above, the city has a Sphere of Influence (SOI) that includes areas to the north and south of the existing city limits. To the north, the SOI includes two areas along Highway 113, one area between County Road 101A and County Road 102, one area northeast of County Roads 105/30 (which consists of the Yolo County landfill and the City of Davis sewage treatment plan), and a fourth area just south of County Road 30B on the Mace curve. These areas consist of residential development in unincorporated Yolo County (Royal Oak, Willowbank, and El Macero). To the south, the SOI includes three areas south of Interstate 80 and the UC Davis campus area. With the exception of the UC Davis campus, the MTP/SCS does not identify development within these SOI areas by 2040.

By 2040, the MTP/SCS forecast for Davis includes 1,630 new employees and 3,800 new housing units. The majority of this growth, 61 percent of the employment and 60 percent of the housing, is in Established Communities. Employment growth consists of commercial, office, and industrial uses primarily located along Highway 80. New housing growth, ranging from low to high density, is a result of accessory dwelling units on lots of 5,500 sqft and higher, small-scale infill throughout the city, and the Cannery site located along East Covell Boulevard and F Street. The remaining 630 new employees and 1,500 new housing units in the MTP/SCS forecast for Davis are within the Center and Corridor Community, which includes expansion of existing commercial and office uses and redevelopment, mixed use, and new high density residential and employment development. Davis will generally maintain its jobs/housing ratio, which improves slightly from today. However, these figures do not include the dynamic of planned growth at the adjacent UC Davis campus because that growth is in unincorporated Yolo County and is therefore part of the MTP/SCS forecast for the unincorporated County, not Davis.

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West Sacramento

West Sacramento's heavy employment base has shifted toward a more balanced mix of employment and housing in the past decade as residential development has continued to pick up pace in recent years. With the exception of the riverfront area, much of the northern half of the city is developed though significant infill opportunity exists. This portion of the city is characterized as an Established Community in the MTP/SCS. The city's recent development focus has been mixed use higher density projects along the riverfront, including the Bridge District plan, the proposed Pioneer Bluff area, and revitalization of the Washington Specific Plan area. These areas are characterized as Center and Corridor Communities in the MTP/SCS. The city has also made a concerted effort to begin redevelopment and revitalization of the historic West Capitol Avenue corridor. With streetscape improvements, construction of a transit hub and new civic center, and adopted design guidelines, this area is also identified as a Center and Corridor Community in the MTP/SCS.

The city's Southport community began development in 2001, but only a portion of the development potential in this area exists today. The majority of the built area in Southport is considered part of the Established Community in the MTP/SCS. However, the remaining undeveloped areas of Southport, including Liberty, the Southport Industrial Park, River Park, and Yarborough, are included in the MTP/SCS as Developing Communities. The Southport Industrial Park area has slowly begun developing commercial and industrial uses, which at existing allowed capacity could include 5,010 jobs and 1,380 higher density housing units. Liberty is the northern most undeveloped area along the Sacramento River and includes capacity for 1,500 residential units and 70 jobs. River Park is immediately south of Liberty and includes capacity for another 2,790 units. Yarborough constitutes the remaining undeveloped area south of River Park and includes capacity for another 3,000 units.

The MTP/SCS forecast for West Sacramento includes 16,590 new employees and 16,400 new housing units by 2040. The majority of this development, 79 percent of the employment and 76 percent of the housing units, is in infill and redevelopment opportunities within the Center and Corridor Communities. Due to its location, directly across the Sacramento River from downtown Sacramento, and the type of development planned, this area of West Sacramento will become part of the urban core of the region in the future. Significant infrastructure exists or is currently under construction for this area. Together these Center and Corridor areas, all planned for a mix of high density housing, mixed use, and new commercial, office, industrial, and public uses, have the capacity to add 41,730 new jobs and 16,130 new housing units to the city based on existing general plan capacities.

Established Communities include 5,900 new employees and 3,800 new housing units by 2040. Many of these new employees are in existing commercial and industrial centers and most of the new housing is filling in existing subdivisions with some small amounts of infill and accessory dwelling units on lots of 5,500sqft or higher. The remaining growth is in the Developing Communities. The MTP/SCS forecast for Liberty includes 1,500 new housing units and 50 new jobs. The Southport Industrial Park is expected to grow by 3,400 employees and 200 housing units by 2040. The MTP/SCS forecasts 800 units in River Park, all between 2035 and 2040, and 1,400 units in Yarborough by 2040.

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Winters

Winters is a small city surrounded by agricultural uses. The city has deep historic roots as a community and is therefore primarily characterized as an Established Community in the MTP/SCS. This includes the city's gateway, which has undergone recent planning efforts. The Established Community has the potential capacity to add 2,760 new jobs and 1,900 new housing units based on existing general plan densities. The city's Downtown Plan is a form-based code approach to guiding infill and redevelopment opportunities in the historic downtown area, which is designated as a Center and Corridor Community in the MTP/SCS. Because growth in this area is likely to happen primarily through redevelopment, it is difficult to estimate the capacity for new housing and jobs. The city also has a sphere of influence that is north of the existing city limits. Due to current economic conditions and the remaining capacity within the city today, this area is not identified for development in the MTP/SCS.

The MTP/SCS forecast includes 880 new employees and 960 new housing units in Winters by 2040. All of this housing is planned for Established Communities, likely in the northern portion of the city where the newer residential growth has been concentrating. New residential growth ranges from low to medium-high density and includes limited mixed use and accessory dwelling units on lots of 5,500 sqft or more. A small amount of employment development is assumed in the Center and Corridor Community, adding 120 new employees. The remaining employment growth is in Established Communities, including mainly commercial and industrial uses at the gateway and along East Grant and Grant Avenue.

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Woodland

Due to its role as the county seat, and its location along Interstate 5, Woodland has maintained a balanced jobs/housing ratio (1.3 in 2016). Most of the city is characterized as an Established Community in the MTP/SCS, but most of the new housing construction is within the Spring Lake Specific Plan area, which is characterized as a Developing Community in the MTP/SCS. The City is also moving forward with another new growth area called the Woodland Research and Technology Park immediately west of the Spring Lake Specific Plan. This area is also characterized as a Developing Community in the MTP/SCS. Woodland's recently (2017) adopted General Plan identifies a downtown area and mixed use corridors along East St. and Main St. These areas are designated as Center and Corridor Communities in the MTP/SCS. The General Plan also identifies several new growth areas, which are not identified for growth in the MTP/SCS by 2040.

By 2040, the MTP/SCS forecast includes 8,210 new jobs and 4,690 new housing units in Woodland. Established Communities include 5,720 of the new jobs and 630 of the new housing units. Because vacant residential land in the Established areas of the city is limited, most of this housing growth is in scattered infill throughout the city and some accessory dwelling units on lots of 5,500 sqft or more. The city's Established Communities also include several existing job centers where industrial and commercial uses are concentrated. These areas have the potential to add 24,555 new jobs at existing allowed capacity. The MTP/SCS assumes 5,720 jobs will be added in Established Communities, which accounts for 70 percent of the city's total employment growth in the MTP/SCS. Center and Corridor Communities also build a significant amount of their existing capacity for new housing in the MTP/SCS. The MTP/SCS forecast includes 1,320 new housing units and 1,280 jobs in this area. Development in these areas in the MTP/SCS consists of primarily residential and commercial mixed use with medium to high density housing. Consistent with the city's plans and recent trends, the MTP/SCS includes some redevelopment in this area, which may contribute to the net employment gain being less than the housing growth for the area. Most of the new residential growth is in Spring Lake, which is currently building today and is estimated to include 2,540 new housing units, averaging 8 units per acre, and 210 new employees by 2040. At existing allowed capacity, this Developing Community has capacity for 4,180 housing units and 1,600 employees. It includes new neighborhood-serving commercial and public uses and a variety of new housing, with an average density of eight units per acre. The Woodland Research and Technology Park has a capacity for 6,000 jobs and 1,600 units. The MTP/SCS assumes that 1,000 jobs and 200 units will be built by 2040. All 200 units are assumed to be built between 2035 and 2040.

SACOG is required to update the MTP/SCS every four years. As a result, SACOG continuously monitors development activity throughout the region to gauge implementation of the plan as well as track policy, regulatory, and market factors that could influence changes in the land use forecast in future updates. At a regional level, SACOG will monitor economic and land development trends, general location and type of housing construction, housing rezones related to the 2021-2029 Housing Element updates, what local agencies are using their SB 2 planning grant funds for, what projects use CEQA streamlining related to the MTP/SCS, employment growth, general plan updates, and new specific plans or master plans. In Woodland, factors that could affect land use forecast in the next MTP/SCS include the rate of infill development, the timing of development in the Research and Technology Park, and the timing and pace of planning and development of the new growth areas identified in the General Plan.

Yolo (Unincorporated County)

Yolo County is the western edge of the Sacramento region, and an important part of the Interstate 80 corridor linking Sacramento to the Bay Area. The county has remained largely an agricultural resource area with most growth occurring in its incorporated cities and unincorporated towns. This commitment to agriculture and preserving the county's rural character has been reinforced by the county's general plan adopted in 2009. The general plan directs all residential growth to designated areas within cities and growth boundaries of existing unincorporated communities (with the exception of farm dwellings). Development pressures on prime farmland between Davis and Woodland have led these two cities and the county to enter into an agreement to preserve the land for agricultural use. This is further supported by the urban growth boundaries in both cities. Growth in unincorporated Yolo County is directed to the existing unincorporated towns of Capay, Clarksburg, Esparto, Knights Landing, Monument Hills, Yolo, and Zamora, though many have flooding and/or infrastructure constraints. These communities are characterized as Established Communities in the MTP/SCS. The towns of Esparto has the majority of the new housing potential. The remaining agricultural and natural resource areas of the county are also not identified for development in the MTP/SCS. However, agricultural-related housing and employment is likely to occur in these areas and is supported by the MTP/SCS environmental sustainability policies. UC Davis is located in the county, just south of Davis, and is characterized as a Center and Corridor Community in the MTP/SCS.

The MTP/SCS forecast for unincorporated Yolo County includes 3,300 new jobs and 2,800 new housing units. Of this growth, 2,500 new jobs and 2,700 new housing units are at the UC Davis campus, per growth plans agreed to in the 2018 Long Range Development Plan. The remaining 800 new jobs and 100 new homes are in Established Communities. These new housing units are largely low and medium density; however, a range of densities from very low to high density are planned. New jobs come primarily from new commercial, industrial, and public uses. The MTP/SCS does not forecast new agricultural employment or farm dwellings, both of which are likely to continue to grow in Yolo County.

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YUBA COUNTY

Marysville

The City of Marysville has historically maintained a compact footprint due in large part to significant flood constraints. With outward expansion limited, growth opportunities in Marysville are primarily small scale infill and redevelopment. Marysville adopted a Downtown Strategic Plan in 2004 to facilitate this type of development. This area of the city is characterized as a Center and Corridor Community, while the remaining city is considered an Established Community.

The MTP/SCS 2040 growth forecast for Marysville includes 660 new employees and 240 new housing units. Beyond this, general plan capacity could add an additional 350 housing units. The majority of this growth, 70 percent of the new employment and 91 percent of the new housing, is expected to occur in Established Communities through infill development including low to high density residential, accessory dwelling units on larger lots in the northeast part of the City, mixed use, and commercial and office employment. The remaining growth, 30 percent of jobs and 9 percent of housing, is expected to occur in the Center and Corridor Community area through infill and small amounts of redevelopment.

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Wheatland

Wheatland is a small city along Highway 65. In the early 2000s Wheatland experienced accelerated housing growth as workers in Placer County moved north along the Highway 65 corridor to find housing. The northern and eastern portion of the city, where most of the newer residential activity has happened in the last two decades, is considered an Established Community in the MTP/SCS. The city's existing downtown area is characterized as a Center and Corridor Community. The easternmost and southernmost portions of the city that cover the approved Jones Ranch and Heritage Oaks are characterized as a Developing Community in the MTP/SCS. The remaining city limits is made of the recently annexed large area covering the Johnson Rancho/Hop Farm project area. This area and the city's remaining Sphere of Influence (SOI), including the approved Nichols Grove project area, are not identified for development within the MTP/SCS planning period.

The MTP/SCS forecast for Wheatland includes 600 new employees and 1,090 new housing units by 2040. Of this growth, 200 employees and 350 housing units are within Established Communities, primarily building out existing newer subdivisions and new neighborhood-serving commercial and public uses. Most of the new housing growth (68 percent) in the city is in Developing Communities. Jones Ranch and Heritage Oaks, the Developing Community in the existing city limits, accounts for 400 new employees and 740 new housing units. These employees are primarily from commercial and public uses and the housing growth is expected to continue the trend for low density units, averaging about six units per acre.

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Yuba (Unincorporated County)

While historically a rural agricultural county, unincorporated Yuba County approved several specific plans in the 1990s that have been building out ever since. The county also adopted its general plan in 2011. The general plan categorizes housing development in the county into two main categories: Valley Neighborhood and Rural Community. Rural Communities include the communities of Hallwood, Browns Valley, Loma Rica, Oregon House, Dobbins, Rackerby, Brownsville, Challenge, Log Cabin, Camptonville, Strawberry Valley, Smartsville, and Camp Far West. General plan policies support the continued rural character of these communities and, therefore, they are characterized in the MTP/SCS as Rural Residential Communities. The Valley Neighborhood areas include the existing communities of Linda and Olivehurst, as well as the newer growth areas of Plumas Lake, East Linda, and the North Arboga Study Area. Linda and Olivehurst are characterized as Established Communities in the MTP/SCS. Beale Air Force Base, the only active military base in the region and the largest employer in the Yuba-Sutter sub-region, is also designated as an Established Community in the MTP/SCS. The majority of housing development in recent years has occurred within three newer growth areas in the unincorporated county. These growth areas, Plumas Lake, North Arboga and East Linda, are designated Developing Communities in the MTP/SCS. The county's general plan also establishes a Valley Growth Boundary as a focus for economic development, demonstrating the county's commitment to providing more job opportunities for residents who would otherwise likely be commuting to Placer or Sacramento for work. As such, the general plan identifies a new employment center along Highway 65, which is also identified as a Developing Community in the MTP/SCS. The general plan identifies mixed use corridors along North Beale Road and Olivehurst Avenue as areas where the county envisions infrastructure improvements to encourage development and redevelopment. Such land uses would include commercial, public, and medium to high density housing, including mixed use. These areas are identified as Center and Corridor Communities in the MTP/SCS. The remaining areas in the county are identified as planning reserve or natural resources in the general plan and are not identified for development in the MTP/SCS planning period.

In total, for all community types taken together, the county has capacity for 30,240 new housing units and 52,480 new employees. Developing Communities represent the largest amount of housing and employment capacity in the unincorporated county. Around 67 percent of that housing and 86 percent of that employment capacity is within Developing Communities. Plumas Lake, the Developing Community located along Highway 70, started building in 2004 and has the capacity for 18,130 homes and 16,180 jobs at build out. This community includes a mix of housing and employment uses with housing densities averaging five units per acre and employment uses including commercial, office, light industrial, and public. Adjacent to the northern border of Plumas Lake is the North Arboga plan area which is also currently under construction. This plan has capacity to add an additional 1,350 new housing units and 2,280 new jobs at build out. It includes commercial, industrial, and public uses and an average residential density of four units per acre. East Linda, located adjacent to the existing town of Linda, also began developing around the same time as Plumas Lakes and North Arboga. This area, at existing allowed capacity, could add commercial, industrial and public uses generating a total of 4,430 employees and 6,010 housing units, averaging six units per acre, to what exists today. The Highway 65 Employment Area has capacity for 23,730 employees at build out, including a wide variety of employment uses, including regional commercial, light and heavy industrial, agricultural processing, office, and public uses. This area will also include the Hard Rock Casino at Fire Mountain on Forty Mile Rd. Established Communities have capacity to add 2,640 new housing units and 3,560 employees at build out. The potential build out employment capacity for Beale AFB is currently unknown. The MTP/SCS assumes Beale AFB could add 5,550 employees and 1,000 new homes at build out. Center and Corridor Communities have a build out potential that could add 310 new homes and 890 new jobs.

The total MTP/SCS forecast for unincorporated Yuba County includes 4,870 new housing units and 6,490 new jobs by 2040. The majority of this new growth is expected to occur in Developing Communities with 1,800 new housing units and 1,400 new employees in Plumas Lake, 2,000 new housing units and 800 new employees in East Linda, 270 new housing units and 220 new employees in North Arboga, and 1,400 new employees in the new Highway 65 Employment Center. The remaining 41 percent of employee growth and 16 percent of housing growth in the MTP/SCS is within Established Communities, Center and Corridor Communities, and Rural Residential Communities. Established Communities include 2,200 new employees and 600 new housing units. The majority of these new jobs are likely to be located at Beale AFB, while the remaining commercial and industrial uses are located within the Linda and Olivehurst area, primarily along Highway 65. The MTP/SCS assumes some mixed use development, including redevelopment of some sites in Center and Corridor Communities. This development adds 460 new employees and 100 new housing units by 2040. Rural Residential Communities in unincorporated Yuba County are expected to experience low amounts of growth, with only approximately 100 new housing units and 10 new jobs by 2040. The MTP/SCS forecast assumes relatively small amounts of new rural residential homes to be constructed in the region by 2040. This is in part due to changing demographics, which suggest a higher percent of the population will choose to live on smaller lots or in attached homes near existing jobs and services with more transportation choices. This is also supportive of the county’s Valley Growth Boundary, which aims to guide the majority of the county’s long term growth into the Center and Corridor, Established, and Developing communities. By 2040, the county’s share of regional employment growth increases from today and their share of the regional housing market remain constant. The county’s share of regional employment is expected to increase, increasing the jobs/housing ratio from 0.6 to 0.7.

SACOG is required to update the MTP/SCS every four years. As a result, SACOG continuously monitors development activity throughout the region to gauge implementation of the plan as well as track policy, regulatory, and market factors that could influence changes in the land use forecast in future updates. At a regional level, SACOG will monitor economic and land development trends, general location and type of housing construction, housing rezones related to the 2021-2029 Housing Element updates, what local agencies are using their SB 2 planning grant funds for, what projects use CEQA streamlining related to the MTP/SCS, employment growth, general plan updates, and new specific plans or master plans. Key issues that may influence updates to the land use forecast in Yuba County include potential wildfire risk and the pace and timing of development in the Development Communities.

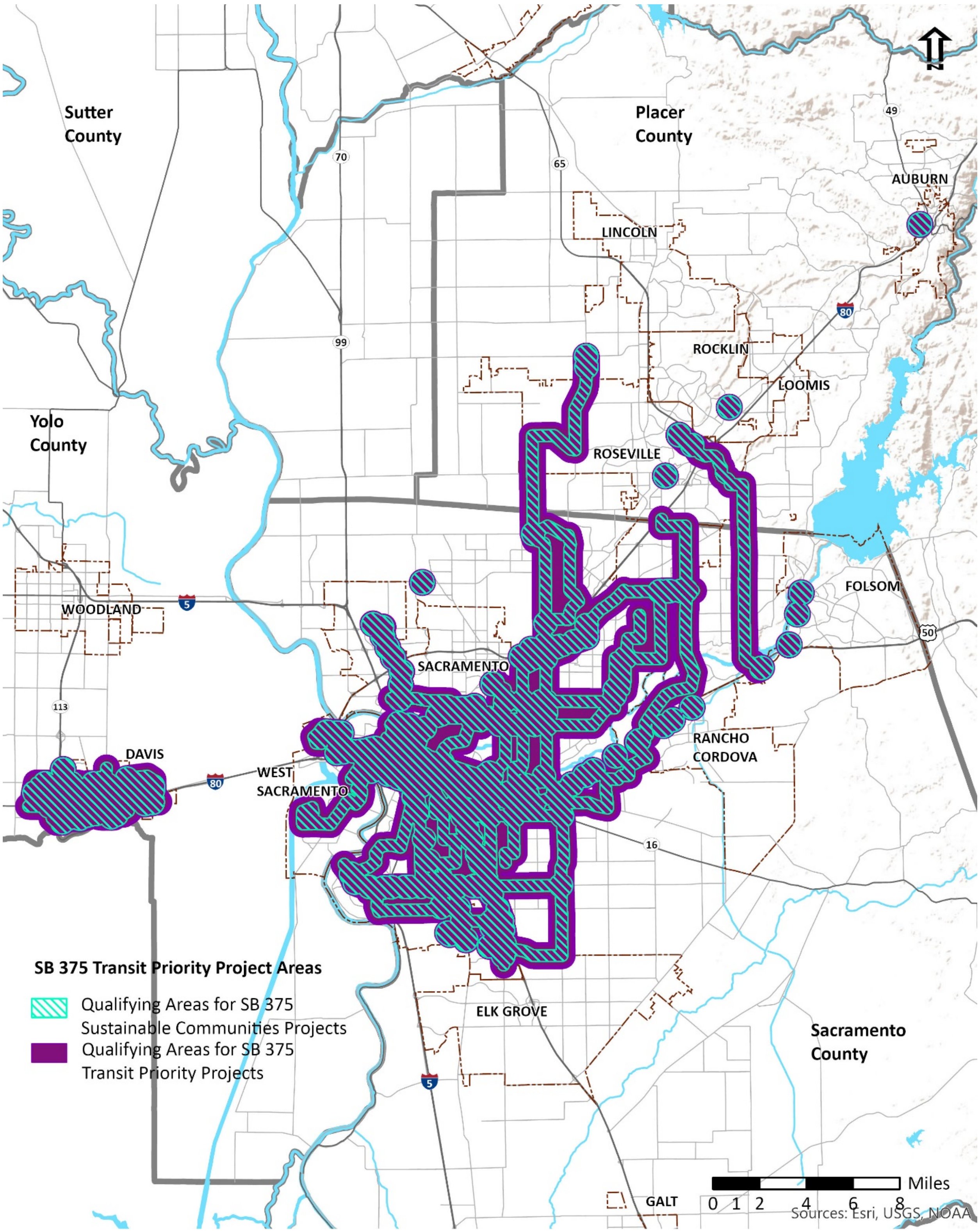
Streamlining Infill Development that Implements the SCS

In recent years, several state laws have been enacted that offer environmental streamlining for land development projects that meet certain criteria, including consistency with the MTP/SCS land uses, densities, intensities, and policies:

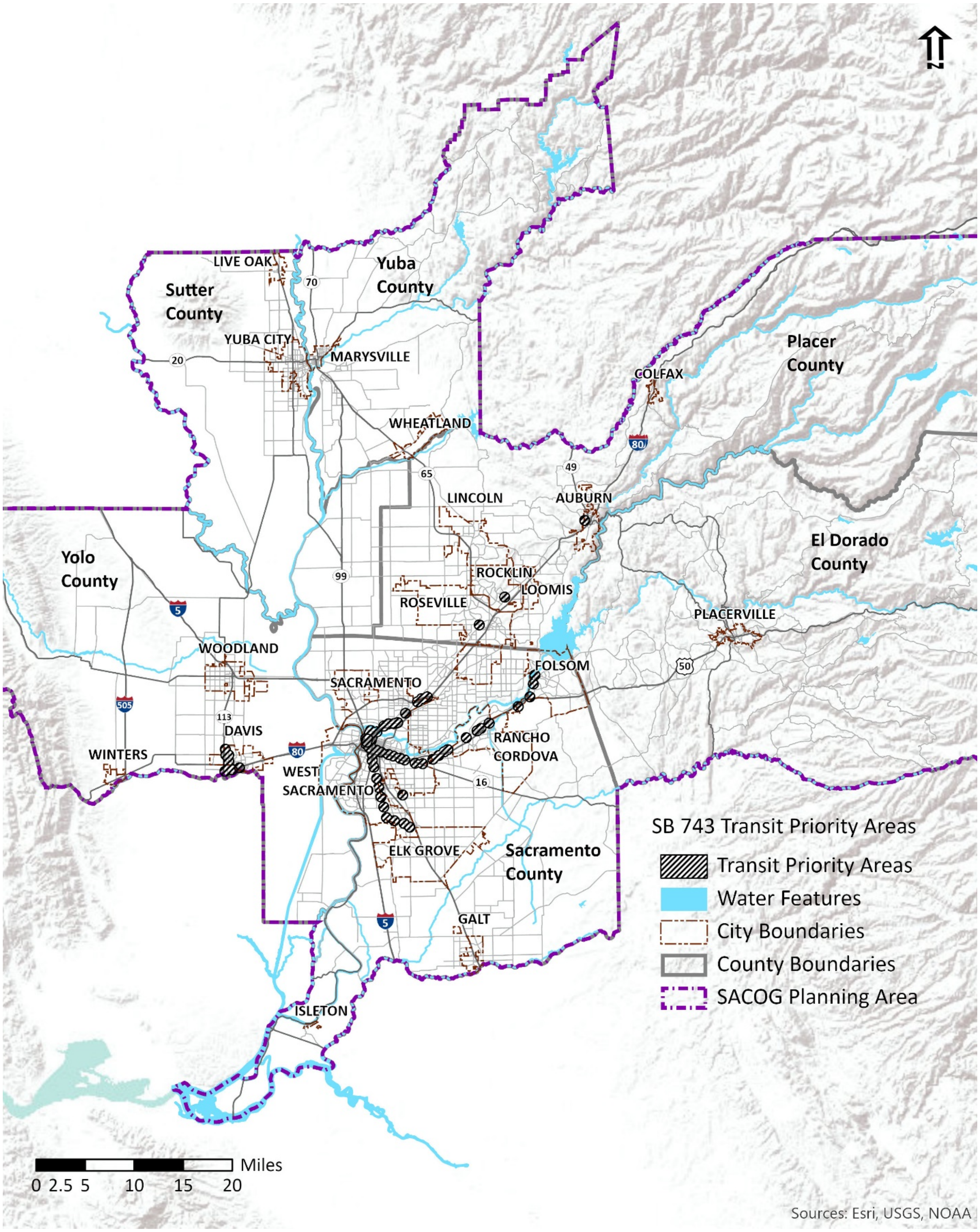
- Senate Bill 375 allows for environmental streamlining or exemption for residential or mixed-use projects based on a number of project criteria including consistency with the MTP/SCS and transit proximity.
- Senate Bill 743 also allows for environmental streamlining or exemption on land use projects that meet certain criteria, including consistency with the MTP/SCS and transit proximity.

SACOG’s website provides more information and tools for projects utilizing these CEQA streamlining options.

SB 375 High Frequency Transit Areas



SB 743 Transit Priority Areas



In the last year, SACOG and member agencies also developed two toolkits to help with transit-oriented development (TOD) and local housing policy:

- The TOD Toolkit was developed through a joint effort of the cities of Sacramento and West Sacramento, and SACOG. The goal of the TOD Toolkit is to provide for any community, a framework for planning and fostering transit-oriented development in high frequency transit areas.
  https://www.sacog.org/transit-oriented-development-toolkit

- The Housing Policy Toolkit was created by SACOG to provide local governments with specific recommendations for changing the framework by which they plan and approve housing projects. It's about reevaluating outdated policies and minimizing governmental barriers to building the homes this region needs, particularly small lot and attached homes.
  https://www.sacog.org/post/housing-policy-toolkit

Background Documentation on the MTP/SCS Land Use Forecast

The tables below serve as background documentation for the land use forecast. Table C-7 includes historical permit data by jurisdiction, including both five and ten year averages. Table C-8 includes a summary of the developing communities survey, which was used by SACOG staff to better understand the regulatory and market dynamics of the many developing communities across the region. Also included is a summary of the market and regulatory research, including a housing white paper, which examines future housing product type preferences.

Table C-7
Historical Housing Permits By Jurisdiction

	Total Permits																	5 Year Average (2013-2017)		10 Year Average (2008-2017)	
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Average Total	Average Permit Share	Average Total	Average Permit Share
EL DORADO COUNTY	1,458	1,501	1,653	1,540	1,455	1,107	693	498	287	119	104	181	430	251	295	72	728	355.2	7.53%	296.5	7.57%
Placerville	0	0	1	0	13	7	22	29	29	5	4	2	47	-1	2	47	51	29.2	0.62%	21.5	0.55%
Unincorporated El Dorado County	1,458	1,501	1,652	1,540	1,442	1,100	671	469	258	114	100	179	383	252	293	25	677	326.0	6.91%	275.0	7.03%
PLACER COUNTY	4,385	5,213	4,966	3,260	3,692	3,178	2,913	259	1,324	1,081	840	1,166	982	1,072	1,647	1,770	2,140	1522.2	32.25%	1228.1	31.37%
Auburn	72	92	110	172	76	14	25	7	11	15	11	4	70	7	12	7	35	26.2	0.56%	17.9	0.46%
Colfax	0	0	0	0	0	2	4	0	1	0	0	0	0	0	0	0	1	0.2	0.00%	0.2	0.01%
Lincoln	1,506	1,464	1,873	747	2,166	1,785	751	14	167	125	80	134	283	259	140	199	176	211.4	4.48%	157.7	4.03%
Loomis	21	24	13	17	3	15	9	2	5	10	8	5	6	6	16	20	11	11.8	0.25%	8.9	0.23%
Rocklin	1,093	1,016	676	442	122	240	203	214	247	133	88	86	133	194	293	507	736	372.6	7.89%	263.1	6.72%
Roseville	1,236	2,019	1,746	1,256	871	650	1,080	22	652	627	461	730	295	570	942	808	926	708.2	15.01%	603.3	15.41%
Unincorporated Placer County	457	598	548	626	454	472	841	0	241	171	192	207	195	36	244	229	255	191.8	4.06%	177.0	4.52%
SACRAMENTO COUNTY	7,873	9,485	10,870	10,400	8,461	2,768	3,216	2,105	1,265	1,109	870	1,163	1,985	1,394	1,829	2,547	3,016	2154.2	45.64%	1728.3	44.15%
Citrus Heights	162	28	15	167	83	29	52	38	43	40	26	23	4	7	38	23	3	15.0	0.32%	24.5	0.63%
Elk Grove	2,162	2,920	4,056	3,967	2,238	265	613	368	297	275	215	309	305	358	640	559	325	437.4	9.27%	365.1	9.33%
Folsom	1,055	848	698	1,031	360	164	163	22	57	105	70	109	257	321	259	155	175	233.4	4.95%	153.0	3.91%
Galt	58	262	61	349	180	50	132	62	11	0	3	5	16	50	65	71	115	63.4	1.34%	39.8	1.02%
Rancho Cordova	13	186	290	297	1,573	129	454	260	319	237	177	195	269	148	511	201	273	280.4	5.94%	259.0	6.62%
Sacramento	2,638	2,554	3,029	3,173	2,734	1,785	1,354	1,060	455	168	111	159	364	413	227	1,241	1,630	775.0	16.42%	582.8	14.89%
Unincorporated Sacramento County	1,785	2,687	2,721	1,416	1,293	346	448	295	83	284	268	363	770	97	89	297	495	349.6	7.41%	304.1	7.77%
SUTTER COUNTY	64	583	635	1,104	1,374	448	365	198	106	84	63	43	100	50	60	134	19	72.6	1.54%	85.7	2.19%
Live Oak	22	6	30	214	334	27	86	25	2	28	35	1	56	0	2	88	0	29.2	0.62%	23.7	0.61%
Yuba City	27	513	559	843	991	398	255	143	82	39	18	24	43	38	43	32	11	33.4	0.71%	47.3	1.21%
Unincorporated Sutter County	15	64	46	47	49	23	24	30	22	17	10	18	1	12	15	14	8	10.0	0.21%	14.7	0.38%
YOLO COUNTY	1,294	1,249	1,260	1,731	821	720	691	539	411	212	164	211	369	265	600	434	664	466.4	9.88%	386.9	9.88%
Davis	240	101	96	97	8	3	35	39	13	9	21	54	94	25	20	119	207	93.0	1.97%	60.1	1.54%
West Sacramento	890	684	675	1,032	589	475	483	189	143	125	70	83	130	159	446	30	201	193.2	4.09%	157.6	4.03%
Winters	38	78	88	43	4	3	10			1	3	0	0	0	0	41	34	15.0	0.32%	7.9	0.20%
Woodland	96	246	302	185	13	199	123	234	212	40	47	53	100	62	112	239	176	137.8	2.92%	127.5	3.26%
Unincorporated Yolo County	30	140	99	374	207	40	40	77	43	37	23	21	45	19	22	5	46	27.4	0.58%	33.8	0.86%
YUBA COUNTY	127	14	310	1,397	1,671	418	257	345	245	102	90	80	67	155	153	196	142	142.6	3.02%	157.5	4.02%
Marysville	0	2	6	1	0	1	2	4	8	5	4	1	2	-1	0	0	1	0.4	0.01%	2.4	0.06%
Wheatland	1	1	140	278	0	0	2	2	0	0	0	0	0	12	0	0	0	2.4	0.05%	1.4	0.04%
Unincorporated Yuba County	126	11	164	1,118	1,671	417	253	339	237	97	86	79	65	144	153	196	141	139.8	2.96%	153.7	3.93%
Other	111	68	71	82	76	114	127	74	70	50	41	47	27	0	5	0	0	6.4	0.14%	31.4	0.80%
REGION TOTAL	15,312	18,113	19,765	19,514	17,550	8,753	8,262	4,018	3,708	2,757	2,172	2,891	3,960	3,187	4,589	5,153	6,709	4719.6	100.00%	3914.4	100.00%

Project/Plan Name	Total Area (in acres)	Total Housing Units	Total Employees	Approved	Year Approved	Tentative Maps Submitted or Approved	Is Annexation Required	Is Annexation Complete	Is there a Development Agreement	Does the project have Federal and State Permits	Is mitigation land secured	Does project have approved plan of finance	Is there a funding mechanism	Does project have sewer and water agreements in place
Amoruso Ranch	694	2827	1115	y	2016	n	y	n	y	n	y	y	y	y
Bickford Ranch Specific Plan	1927	1890		y	2004 (2015 amendment)		n		y	y	y	y	n	y
Bogue-Stewart Master Plan	741	2517		n		y	y	n	n	n	n	y	y	n
Caliterra Ranch (fka Jones Ranch)	190	552		y	2017	y	n	n/a	y	n	n	n	y	y
Clover Valley	662	558	0	y	2007	y	n	n/a	y	n	n	n	n	n
Cordova Hills	2667	9,010	-6548	y	2013	y	n	n/a	y	y	y	y	y & n	y
Creekview Specific Plan	501	2011	445	y	2012	y	y & n	y	y	y	y & n	y	y	y
Easton Place and Glenborough at Easton	1391+	4,833	14500 estimate	y	2008	y	n	n/a	y	y	y	y	y	y
Eastview/ Liberty Ranch	504	1,744	0	y	2006	y	y	y	y	n	n	n	n	y
El Margarita Master Plan	650	1510		n		y	y	y	n	n	n	n	n	y
Elverta Specific Plan	1744.6	4,950	1000	y	2007	y	n	n/a	n	n	n	y	n	n
Garden Glen	43	191		y	2003	y	n	n/a	n	n	n	n	n	n
Grandpark Specific Plan (formerly Natomas North Precinct Specific Plan)	5,690	23,891	17,156	n		n	n	n	n	n	n	n	n	n
Heritage Oaks Estates - East	174.57	490		y	2011	y	n	n/a	y	n	n	n	y	y
Heritage Oaks Estates - West	59.7	173		y	2007	y	n	n/a	y	n	n	n	n	y
Hwy 65 Corridor	400	593-1230	3690-5000	y	2003	y	n	n/a	y	n	n	y	y	y
I-80 Commercial		300-500	2500	y	2009	y	n		n			some		y
Jackson Township Specific Plan	1391	6,143	5740	n		n	n		n	n	y	n	n	n
Laguna Ridge	1,900	6,758	TBD	y	2004	y	n		n	y	y	y	y	y
Lent Ranch Market	295			y	2001	y	n		y	y	y	n	n	y
Lincoln East Specific Plan	1,160	5,307		y/n		n	y	n	n	n	y	y	y	n
Mather South Community Master Plan	848	3,522	1999	n		n	n	n	n	n	n	n	n	n
NewBridge Specific Plan	1,095	3,075	1,350	n		n	n	n	n	n	n	n	n	n
Panhandle Annexation	589	1,662		y	2018	y	y	n	y	y	n	y	y	y
Placer Ranch Specific Plan	2213	5636	16448	n		n	n		n	n	n	n	n	y
Placer Vineyards Specific Plan	5230	14132	7351	y	2007	y	n	n	y	y	n	y	n	y
Regional University Plan	1157.5	4387	1875	y	2008	n	n	n/a	y			n	n	n
Riolo Vineyard Specific Plan	526	933	201	y	2015	y	n	n/a	y	y	y	y	y	y
Riverpark	313.2	2,315		y	2007	n	n		y	n	n	n	n	n
Southeast Policy Area	1200	4050	TBD	y	2014	y	n		y	y	y	n	y	y
Special Use District- B	186	430	2042	n		n	y	n	n	n	n	n	n	
Sterling Meadows	200	984		y	2008	y	n		y	y	y	n	y	y
Suncreek Specific Plan	1265.2	4,893	2380	y	2013	y	n	n/a	y	n	n	y	y	y
Sunset Ranchos/Whitney Ranch	1296	4250	1200	y	2003	y	n	n/a	y	y	y	y	y	y
Sutter Pointe Specific Plan	7528	17500		y	2009	n	n	n	y	n	n	y	n	y
SVSP	2,075	8,679	7,500	y	2010	y	n	y	y	y	y	y	y	y

The Ranch SPA	530	1375	311	y		y	n		n	n	y	n	n	n
Village 1	1832	5639 (anticipated)	425	y	2012	y	n	y	y	y	y	y	y	y
Village 5	4775	8244	11580	y	2017	n	y	n	y	n	y	y	y	y
Village 7	703	3285	426	y	2010 with an update in 2017	y	n	n/a	y	n/a	y	y	y	y
West Jackson Highway Master Plan	5,913	14,763	29,408	n		n	n	n	n	n	n	n	n	n
Westborough Specific Plan	1664	7072	4108	n		n	y	n	n	n	n	n	n	n
Yarborough	711	3004		y	2008	n	n	n/a	y	n	n	n	y	n

2018 White Paper on Future Housing Product Type Demand and Preference

Prepared by the Sacramento Area Council of Governments (SACOG)
For the 2020 Metropolitan Transportation Plan/Sustainable Communities Strategies Update

I. Introduction

SACOG is updating the Metropolitan Transportation Plan/Sustainable Communities Strategy (MTP/SCS), scheduled for adoption in 2020. The MTP/SCS forecasts and plans the transportation system in the six-county SACOG region for the next 20 years. As part of every MTP/SCS update, SACOG creates a growth projection for how many people, homes, and jobs there will be, as well as a land use forecast that estimates where that growth is likely to occur. The projected growth is then used to forecast the region's future transportation system.

A key component of the land use forecast is the type and location of future housing development. In developing the forecast, SACOG considers a number of policy, regulatory and market factors. This paper looks at national, state, and regional trends that may impact the housing market in coming years, and how they are likely to shape and affect demand in the SACOG region. The paper examines current research regarding trends in housing demand and preference. It is intended to be a working document which may be revised over time as new information and data becomes available.

II. Trends Overview

In the six-county Sacramento region, housing supply has not been keeping pace with growth and demand. This was the conclusion of the "State of Housing" staff report presented to SACOG's Board in February 2018 .[i] The paper found that:

- During the 2012-2016/17-time frame, the region added 127,000 new jobs but only 22,000 new homes. Historically, the ideal has been one new housing unit built for every two jobs created. SACOG's rate is currently 1: 5.8.
- The MTP/SCS projects 45% of new housing growth to be attached products. Between 2012-2017 only 16% were multi-family units.
- SACOG's projections do not take into account the prior deficit in housing supply.
- The mismatch between supply and demand for housing has resulted in an increasingly higher priced market for both owners and renters.
- Because household incomes have not kept pace with the rapid increase in housing costs, more than half of the region's renter households at all income levels and nearly a third of owners with a mortgage are cost-burdened, paying more than 30% of their income for housing.

This prior paper showed clearly that the SACOG region is falling behind in meeting people's needs for housing. Housing is being developed at a much slower rate than almost any time since the early 1980s. In information provided by Greg Paquin of the Gregory Group, building permits in the six-county Sacramento region averaged less than 3,500 per year between 2009 and 2014. In the last three years, 2015-2017, the rate of production has increased, but it still lags behind previous decades. The inventory of unsold new homes has also been consistently lower than in the early to mid-2000s, and was less than 1,000 homes at the end of 2017. Multifamily development is increasing, but despite rental demands, it comprised 28% of building permits in 2017 compared with 72% for single family homes.[ii] According to ULI, "the past five years have shown that the market is not necessarily capable of building as much housing as is demanded by growth, a condition that has kept prices high for the limited supply.[iii]

Based on the research in this paper, what is less clear is that the new homes being developed and purchased truly reflect consumer preferences or are simply a reflection of what is available and affordable in the market today. The majority of the region's housing stock was built between 1950 and 1990,and is fairly homogeneous. As of 2016, over 75% of the region's housing is single family detached. Approximately 60% of the region's stock are single-family homes on large lots (lots greater than 5500 square feet), and 12% single-family on small lots (lots less than 5500 square feet). Only 28% are attached homes, including other single-family options such as duplexes and townhomes, and multi-family rental apartments.

Because the existing housing stock is largely single family homes on large lots, new supply will need to include more diverse for-sale and rental product types at more price points in more locations to meet the breadth of demand and preferences in the region. The research led to the following 11 findings, with more detailed sections to follow.

1. As the largest generation, Millennials are and will continue to be a major driver of demand for both for-sale homes and rentals.
2. Older adults are becoming a larger proportion of the SACOG region's population and increasingly want to age in place or, if they move, seek a diversity of housing choices.
3. Demand exists for housing across city, suburban, and rural/small town locations.
4. Research shows preferences for locations close to work that enable short commutes.
5. The research identifies preferences for walkability and access to shopping, services, and transit.
6. Like the nation, Sacramento is largely suburban, but there is demand for a mix of housing types and attached products in suburbs.
7. Many Millennials face challenges that point to a need for more housing diversity and affordability.
8. Rentals continue to be an important part of the housing market across generations.
9. One in every five U.S. residents lives in a multigenerational household, creating demand for new housing products.
10. Small households are increasing, creating a market for smaller and lower priced homes.
11. Financial and real estate advisors point to the need for greater market diversity.

III. Housing Research: Trends and Preferences

Generational Trends

Finding #1: As the largest generation, Millennials are and will continue to be a major driver of demand for both for-sale homes and rentals.

- Millennials, or Generation Y, are those born between 1980 and 2000. They are the biggest generation nationally, and include over 696,000 Millennials in the SACOG region.[iv]
- Nearly two-thirds of Millennials (65%) see homeownership as part of the American dream.[v]
- Millennials are the largest group of current home buyers, making up 30% to over 40% of all buyers nationwide, and about two-thirds (66%) of first-time buyers.[vi],[vii]
- Several surveys found about 80% of Millennial renters say they would like to buy a home.[viii]
- One-third of Millennials expect to buy a home in the next 3-5 years, and another quarter five years or later.[ix]
- Despite their aspirations, Millennials face numerous challenges to buying a home, including rent burdens, student debt, limited housing supply, and high housing prices, that drive demand for more rentals and diversity of products in the market. (See Finding #7 for greater detail)

Finding #2: Older adults are becoming a larger proportion of the SACOG region's population and increasingly want to age in place or, if they move, seek a diversity of housing choices.

- Those age 65 and over are expected to comprise 55% of total population growth in the SACOG region between 2010 and 2030. By 2040, Sacramento, Sutter, Yolo and Yuba counties are projected to have about 1 in 5 residents aged 65 or older, with El Dorado and Placer counties nearing 1 in 3 and 1 in 4, respectively.
- The 2015 United States of Aging Survey of adults age 60+ found that 75 percent said they planned to live out their lives in their current home.[x]
- A California Association of Realtors (CAR) baby boomer survey in 2016 found that 71% of Californians aged 55+ had not moved since 1999, and 64 percent did not plan to sell their home when they retired.[xi]
- A Freddie Mac survey in 2016 of homeowners age 55+ found 59 percent were very satisfied with their current community, and 64 percent with their current home or apartment. Comparing preferences between homeowners and renters, as shown in Table 1, Freddie Mac's survey found older and retired homeowners and renters the most likely to want to stay in place.[xii]

Table 1. Prefer to stay in current residence over moving one more time

	Homeowners	Single Family Renters	Multifamily Renters
All 55+	63%	43%	42%
Silent Generation	75%		53%
Older Boomers	63%		42%
Younger Boomers	50%		34%
Retired	70%	55%	49%
Still Employed	52%	29%	30%

Source: Freddie Mac

Table 2. Factors Rated "Very Important" in Deciding Whether to Move/Where to Live

	Homeowners	Single-Family Renters	Multifamily Renters
Affordability	46%	59%	59%
Amenities for retirement years	44%	42%	47%
Less home maintenance	41%	39%	39%
Reduced property maintenance	30%	39%	44%
Proximity to family	31%	33%	24%
Walkable community	28%	39%	45%
Abundant age-related services	25%	29%	36%
Public transportation	17%	26%	43%
Warmer climate	19%	24%	24%
Downsizing	19%	18%	10%

Source: Freddie Mac

- According to real estate builders and developers, older adults are looking for choices representing the diversity of their circumstances and preferences. If they move, they seek a variety of options including:
    - Age-restricted or age-targeted communities, including active 55+ resort style retirement communities
    - Downtown/centrally-located urban apartments and condos near diverse cultural amenities and transportation options
    - Suburban or rural locations that offer experiences on site
    - Affordable senior or multigenerational apartments
    - Independent or assisted living communities with some level of services

Preferences for Location

Finding #3: Demand exists for housing across city, suburban and rural/small town locations

- A 2015 survey by the Urban Land Institute found over 46% of Millennials (owners and renters) living in cities.[xiii]
- ULI's 2015 survey showed the strongest preference for city locations among Millennials, Latinos and African-Americans; with an increased preference for suburban locations among other Millennials and African-Americans; and an increasing preference for more rural/small town locations among Gen Xers, older adults, and Latinos.[xiv]

Table 3. Current and Desired Location, by Race/Ethnicity and Generation[xv]

		Cities		Suburbs		Rural/Small Towns	
		Current	*Desired*	*Current*	*Desired*	*Current*	*Desired*
Total	**All Adults**	**36%**	**29%**	**26%**	**27%**	**37%**	**42%**
Race/ethnicity	White	30%	23%	27%	26%	42%	48%
	African American	47%	42%	25%	34%	28%	22%
	Latino	56%	44%	24%	24%	19%	30%
Generation	Millennials	46%	37%	24%	29%	30%	32%
	Gen Xers	36%	28%	25%	25%	38%	44%
	Baby Boomers	30%	22%	30%	24%	39%	51%
	Silent	24%	23%	27%	28%	49%	46%

- A national survey conducted by the Demand Institute identified the most demand for moving to the suburbs rather than to rural areas, as shown in Table 4. Of movers, 18% expressed a desire to be closer to the city than currently, and 59% the same distance, suggesting only a small portion would consider moving further out.[xvi]

Table 4. Current and Next Home Location of Movers

Urban		Suburban		Rural	
Current	*Next Move*	*Current*	*Next Move*	*Current*	*Next Move*
30%	**27%**	**47%**	**50%**	**23%**	**23%**

- UC Davis research found an inclination toward suburban location is highest for those from Generation X who already live in suburban areas, and lower for Millennials living in urban neighborhoods compared with their cohorts in suburban or rural areas.[xvii]
- However, the UC Davis research also found that many Millennials see themselves living in a suburban area in the long term. The researchers posit that this could indicate that urban living may be a transition stage for some of this generation., and that it will be important to understand "the different patterns in lifestyles and behaviors among the various segments of the heterogeneous population of millennials."[xviii]

Finding #4: Research shows preferences for locations close to work that enable short commutes.

- Valley Vision and the Sacramento State Institute for Social Research conducted a scientific regional poll on attitudes towards transportation in the SACOG region. The survey contained several questions related to housing and neighborhood preference. As shown in Table 5, over 60% of respondents said they would trade a short commute for a smaller house and backyard,[xix]

Table 5. 2017 Regional Survey Responses

All things being equal, proportion of respondents who would rather:	%
Have a short commute to work and live in a smaller house with a smaller backyard	61%
Have a long commute to work and live in a larger home with a larger backyard	39%

Source: Valley Vision/ Sacramento State Institute for Social Research (ISR)

- 65% of Millennials say that a location close to work is the most important factor in choosing a location.[xx]
- According to research conducted at UC Davis, including the SACOG region, mode choice is shifting, with Millennials commuting less by solo driving than their Gen X counterparts (68.7% vs. 74.6%) and biking, walking, taking transit, and carpooling in greater proportions, as shown in Figure X. The UC Davis research found about 30% of Millennials and about a quarter of Gen Xers said they would prefer to live close to transit "even if it means I'll have a smaller home and live in a more crowded area."[xxi]

Preferences for Neighborhood Features and Housing Type

Finding #5: The research identifies preferences for walkability and access to shopping, services, and transit

- A number of surveys in the 2000s indicated preferences for features that are more "urban" – walkability, nearby shopping, grocery stores, pharmacies, parks, and access to medical care and public transit. Table 6 compares newer survey results concerning community features that are similar high priorities for different groups., Proximity to parks/green space and healthy food rank highest across the board, while access to retail, health care, and public transit are all priorities as well.

Table 6. Percentage of respondents indicating priority for various community attributes[xxii,xxiii,xxiv]

Source	Attribute	Grocery store/ Healthy food	Parks/ Green Space	Walkbility	Health care	Shopping/retail, entertainment	Convenient public transit
ULI Terwilliger Center	**All Adults**	73%	55%	50%	50%	42%	32%
	Generation						
	Millennials	71%	56%	54%	50%	44%	39%
	Gen Xers	71%	55%	45%	40%	36%	25%
	Baby Boomers	77%	54%	49%	52%	43%	29%
	Silent Generation	73%	52%	51%	65%	49%	33%
	Movers						
	Very/somewhat likely	71%	55%	51%	50%	44%	34%
Demand Institute	**Survey Respondents**						
	All Adults/*Movers (ital)*	*85%*	*75%*	39%	*72%*	*69%*	25%
NAHB	**Recent/Prospective Homebuyers**						
	Baby Boomers		63%	61%		64%	38%

- ULI's *America in 2015* survey found that 63% of Millennials prefer living in a "car-optional" neighborhood.[xxv]
- The Valley Vision/Sacramento State regional survey found 49% prefer a walkable neighborhood with access to transit, schools, work and shopping.[xxvi]

Table 7. 2017 Regional Survey Responses

All things being equal, proportion of respondents who would rather:	**%**
Live in a neighborhood where the homes are closer together and it is convenient to walk or use public transit to go to schools, work, and shopping	49%
Live in a neighborhood where the homes are further apart from one another and you have to drive to schools, work, and shopping	51%

Source: Valley Vision/ Sacramento State Institute for Social Research (ISR)

- The 2015 ULI Survey found neighborhoods with a diversity of ages and backgrounds important across the generations.[xxvii]

Table 8. % Preferring to Live in Diverse Community

	Variety of ages	Different cultures/ backgrounds
All adults	**78%**	**66%**
Generation		
Millennials	75%	76%
Gen Xers	82%	72%
Baby boomers	81%	61%
Silent	73%	44%
Movers		
Very/somewhat likely	76%	69%

Finding #6: Like the nation, Sacramento is largely suburban, but there is demand for a mix of housing types and attached products in suburbs

- A recent Nationwide Mortgages found 50% of Millennial homeowners living in suburban areas, and 25% in urban areas.[xxviii]
- Recent research by RCLCO and the ULI Terwilliger Center developed a new definition of suburbs. Using this definition, they classified most of the four-county Sacramento area as suburban, finding the various generations (Gen Z, Millennials, Generation X, Baby Boomers, Silent Generation) fairly consistently distributed across the variety of suburb types.
- Their research found 83% of minority households, 82% of high-income Millennial households (incomes $75K+) and 75% of lower income Millennial households living in the suburbs. Using their classification, Millennials showed a slightly higher concentration in urban areas (14%).[xxix]
- In the Valley Vision/Sacramento State poll, 38% of respondents said that, all things being equal, they would rather live in a neighborhood with a "mix of housing types such as single family homes, condos, townhouses, and apartments" over a predominantly single family area.[xxx]
- The National Association of Realtors' national survey in 2015 found over half of Millennials and over 40% of other generations with a preference for an attached home with a shorter commute and walkability.[xxxi]
- As shown in Table 9, among likely Millennial movers, Nationwide found 38% expecting to move into an attached product or apartment.[xxxii]

Table 9. Current and Future Housing Types for Millennials: Among Millennial likely movers

	Current	Future
Single Family	48%	59%
Duplex/Rowhouse/Townhouse	18%	25%
Apartment	28%	13%

Source: Nationwide

Finding #7: Many Millennials face challenges that point to a need for more housing diversity and affordability

- Millennials face rent burdens. The largest cohort of Millennials is turning 30. With rents rising, even adjusting for inflation, a national study found single Millennials by age 30 will have paid over $90,000 in rent, a much larger share of their income and a higher rent burden compared with previous generations (see Tables X and X). Paying a high proportion of income on rent makes saving for a down-payment a challenge, particularly if the renter also has student loans to repay.

Table 10. Rent paid by each generation (2017 dollars)

Generation	Age in 2017	Total rent paid in 8 years (ages 22-30)
Baby Boomers	70	$66,900
	60	$72,800
Generation X	50	$81,400
Older Millennials/Gen X	40	$85,800
Younger Millennials	30	$93,400
Generation Z (forecasted)	20	$102,100

Table 11. Rent Burden or
% of 8-Year Income Spent on Rent, by Generation

Baby Boomers	36%
Generation X	41%
Age 22-40	45%
Older Millennials/Gen X (now 30-40)	44%
Younger Millennials (now 22-29)	47%

- Between 2006 and 2016, student loan debt increased from about $480 billion to nearly $1.4 trillion.[xxxiii] As of quarter 2 of 2015, average real debt per borrower rose from about $19,000 to $27,000.[xxxiv]
    - The 2016 National Association of Realtors annual HOME Survey found 47% of respondents age 34 and under, 32% of those ages 35-44, and 37% of renters with student loan debt.[xxxv]
    - Per an analysis conducted by Fannie Mae of renters aged 25-44 (the age of most remaining student debt), "Renters with student loans are 28 percent less likely to say they will buy, rather than rent, their next home than those without student loans, when controlling for differences in age, income, and marital status."[xxxvi]
- Current housing prices make it harder to afford a home. A 2015 ULI survey found only 52% of Millennials were confident in their ability to afford the home they desired.[xxxvii] 55% of non-owners cited "can't afford to buy a home" as the main reason they are not currently homeowners.[xxxviii] By far, the biggest obstacle has been affordability, with 77 percent saying that is their biggest barrier to ownership.[xxxix]

- Even if they can buy, 48% of Millennials say they want a new home because they lack the extra money for renovations.[xl]
- There is limited supply of starter home products. An analysis by realtor.com found nationally that in the five-year period between 2013 and 2017, the supply of starter single family homes declined at 17% year-over-year, with smaller homes (750-1,500 sf) decreasing from 29% of all inventory in 2013 to 24% in 2017.[xli]
- Many Baby Boomers are aging in place, reducing turnover of their properties to younger households. As Javier Vivas, Director of Economic Research for realtor.com notes, "Boomers indeed hold the key to those homes the market desperately needs, both in the urban condo and the detached suburban home segment. But with a strong economy and rising home prices, there's really no reason for established homeowners to sell in the short term. Although down-sizing might be on the minds of boomers, they face the same inventory shortages and price increases plaguing millennials."[xlii]
- Mortgage data firm Ellie Mae found Millennials are moving to smaller towns in the central U.S. to find lower cost rents and opportunities to save for a down payment and purchase a home they can afford.[xliii]
- According to a Harvard housing study of demographic change, Millennials' decisions to buy a home are driven more by affordability than location and amenities. An analysis found a 5% difference in Millennial homeownership rates where house prices were 20% below or above the national median.[xliv]

These trends point to a need for a broader array of housing options, including more starter homes, rental opportunities, and lower cost options to meet the market demand of Millennials, and to encourage them to locate and stay in the region.

Finding #8: Rentals continue to be an important part of the housing market across generations.

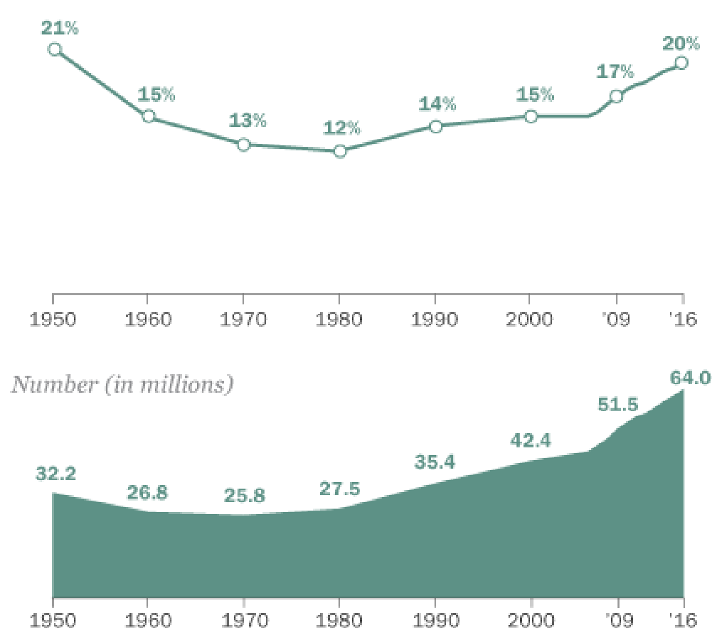
- A survey conducted by the Harris Poll for Freddie Mac found 58% of renters with the belief that "renting fits my current lifestyle" including 63% of younger Millennials and Baby Boomers. Affordability drove renting for 41% of respondents, while 33% said purchasing a home was not a priority at the moment.[xlv]
- SACOG's February 2018 housing status paper found that, during the 2012-2017 period, median monthly rents for a 2-bedroom, adjusted for inflation, increased less than for-sale homes, but rose 33% in the Sacramento Metro area (from $1,180 to $1,596 per month) and 11% in the Yuba City Metro area (from $1,009 to $1,083). Notes ULI, "The comparative pace of the economic recovery has been slower in Sacramento, but the economy now appears to be on a positive growth trend. The medical service sector is adding better-paying jobs, which is spurring demand for housing. Sacramento homeowners hurt by the single-family housing bust have been slow to return to the market, and a number have chosen to be renters rather than take on the risk of ownership. This has kept upward pressure on rental market rents."[xlvi]

- A national study by ULI found that multifamily rentals are fairly evenly distributed across age groups. But while families comprise 49% of renters of single family homes, middle age and older households without children comprise nearly 65% of all single-family homeowners.[xlvii]
- ULI's 2017 outlook for real estate projected increased demand for rentals, stating, "Housing rental rates will surge over the long term. The sharing economy's de-emphasis on ownership will be reflected in soaring demand for rental units. Well over half of the 12.5 million net new households created over the next decade will rent, including those who have never owned, and those making the switch from owning to renting as they age."[xlviii]

Finding #9: One in every 5 U.S. residents lives in a multigenerational household, creating demand for new housing products

- Between 2012 and 2014, the population living in households with two adult generations increased 8.8%, from 27.3 to 29.7 million people, and those living with three or more generations increased 4.5%, from 26.5 million to 27.7 million.[xlix]
- Per the Pew Foundation, in 2016, 20% of Americans lived in a household with at least two adult generations, or grandparents and grandchildren below the age of 25 -- back up to nearly the same rate as in 1950.[l]

Figure 1. Proportion of Population in Multigenerational Households



Source: Pew Research Center

- As of 2016, 31% or nearly 1 in 3 of adults aged 18 to 34 lived with their parents, compared with 26% or 1 in 4 in 1975.[li]

- In 2016, 29% of Asians, 27% of Hispanics, 26% of blacks, and 16% of whites lived in multigenerational households. Greater rates of immigration and population growth are likely factors in the higher rates of Asians and Hispanics living with several generations of family.[lii]
- In a 2016 survey of over 20,000 home shoppers by John Burns Real Estate Consulting, 44% said they would like to accommodate older parents and 42% adult children in their next home.[liii]
- Large homebuilders such as Lennar and Pardee are now including plans that bring together older and younger
- generations in the same house or property but offer separate spaces for some privacy.[liv]

Finding #10: Small households are increasing, creating a market for smaller and lower priced homes.

- The SACOG region has seen growth in single person households. Statewide the proportion dropped (28% to 24%), but increased in the SACOG region (25.8% to 27.5%). During the same time period, single person households made up a significant proportion of all new households: 26.6% in California, but 30.2% in the SACOG region.[lv] This could be due in part to the region's being somewhat more affordable than the other major population centers like the Bay Area and Southern California.
- Younger adults are delaying many of the milestones considered common to adulthood, including marriage and children. In the 1970s, 8 in 10 people had married by the time they turned 30. Today, not until the age of 45 have 8 in 10 people ever married. By age 30 in 1976, 75% of women had had a child, compared with about 32% in 2014. By age 44 (when fertility begins to wane), only 7% of women in 1976 had not had a child, compared with 20% in 2014.[lvi]
- Nearly 75% of all households in the region have three or fewer people. As shown in Table 12, over 58% of households in the region have 1-2 people, and 74% have three or fewer members. These small households also make up the vast majority of the growth in households region-wide.

Table 12. % of households with 1, 2, or 3 people, 2000-2016

Geography	YEAR	1 person hh	≤2 person hh	≤3 person hh	% of 2000-2016 household growth with 1-3 persons
California	2000	23.5%	53.2%	69.2%	83.8%
	2010	24.2%	53.9%	70.0%	
	2016	23.9%	54.1%	70.8%	
SACOG region	2000	24.8%	57.5%	73.9%	76.2%
	2010	25.9%	58.6%	73.5%	
	2016	25.8%	58.3%	74.3%	

- While some of these small households may want and be able to afford more traditional large lot single family homes with many bedrooms and bathrooms, smaller home sizes at lower price points are also needed to meet this market demand, providing opportunities for more infill, rental, small lot and attached homes.

Finding #11: Financial and real estate advisors point to the need for greater market diversity.

- RCLCO notes, "Instead of targeting the meat of the market… high land costs, flat income growth, and a shrinking middle class are leading builders to target fewer but more affluent buyers. New for-s[lvii]ale homes are therefore getting bigger and more expensive; prices are rising faster than incomes; and household formation is outpacing single-family starts. In addition to limiting the affordability of new supply, conventional new detached homes may also be overlooking lifestyle preferences for more walkable, compact communities. As a result, key buyer segments are currently underserved."[lviii]
- ULI notes, "Given that a high percentage of the housing built in U.S. suburbs has not been in walkable areas, there is likely a deficit of homes in walkable neighborhoods. For demographic and preference reasons, combined with the relative scarcity of walkable neighborhoods in the suburbs, there will probably be more demand than has been exhibited in the past for suburban housing in a range of types and prices that is in walkable neighborhoods or at least accessible to such areas (e.g., mixed-use town centers and traditional neighborhood development and its variations)."[lix]
- Per the Demand Institute, "There is tremendous diversity across U.S. communities in terms of features and benefits. This diversity will likely persist going forward, given that these differences reflect divergent consumer needs and preferences. Some prefer and will opt for more density and its attendant benefits, while others will opt for benefits more typical of the suburbs. Indeed, this diversity across communities and locations is a good thing, providing consumers with options consistent with their life stage and preferences."[lx]
- "'It may be overhyped,' says Adam Ducker, managing director at RCLCO of the potential wave of millennials moving to the suburbs. "But it's still important. In a country of 350 million people, if 3 or 4 percent do something different, that's vitally important. … The real problem here is that nobody in the homebuilding industry is giving them a product they want."[lxi]
- Svenja Gudell, Chief Economist at Zillow, notes, "Buying conditions, in theory, are great right now: Jobs and incomes are growing, and rock-bottom mortgage interest rates are helping keep financing costs low. What's missing from the equation is a lack of homes actually available to buy at a price point that's reasonable for most buyers."[lxii]
- RCLCO/ULI research for Sacramento points to the need for housing development geared to young families and first-time buyers, empty nesters, and low and middle-income renters, and that fills in the "missing middle" in the market, with small lot and attached product types, including two to four plexes, townhomes, row houses, multiplexes, courtyard housing, live/work space, etc.[lxiii]

IV. Implications for the MTP/SCS and Local Jurisdictions

One of the key conclusions of this white paper is that there is a strong demand and need for a diversity of housing product types in more areas of the region. The housing research is as diverse as the households, preferences, economic situations, and lifestyles in our region. However, the region's existing stock of housing heavily favors single family homes, and large-lot single family homes in particular. This means that new supply will need to include other product types, like small-lot single family and attached products, for the region's future stock to more accurately meet demand.

In all, the region will have to examine and work on a number of the issues this paper raises to help meet housing demand in the six-county Sacramento region. Local governments control the regulatory framework by which housing is planned and approved. That framework has played a large role in shaping the housing stock that is in place today. If the region is going to meaningfully shift the type and location of new housing, it may require changes to the regulatory framework in some areas. Local governments could do this through more flexible zoning, both in developing and existing communities, to facilitate more small-lot and attached housing products, including "missing middle" housing. The "missing middle" refers to a range of multi-unit or clustered housing types compatible in scale with single-family homes that can help meet the growing demand for walkability, in urban, suburban, and rural small town settings. Adding more housing types such as duplexes, fourplexes, and bungalow courts would support more walkable communities, locally-serving retail, and public transportation options. Jurisdictions could re-evaluate parking requirements, which significantly add to the cost of housing and limit the feasibility of many product types and projects. Fees could also be examined to incentivize more housing production, especially smaller, more affordable units.

Other parties have roles, too, in meeting the region's housing demand and preferences. Private sector housing developers have stated the need for more construction industry job training and lowering of local fees assessed on new housing as a means of encouraging more production.

SACOG also has a role as the regional transportation planning agency charged with developing the MTP/SCS. SACOG will continue to reflect in the MTP/SCS the unmet and projected need for small lot and multi-family attached housing products throughout the Sacramento region. As a council of governments, SACOG can also play a coordinating, convening, and supporting role for jurisdictions in implementing the MTP/SCS. SACOG is planning implementation assistance in the form of:

- A housing policy toolkit that provides a menu of options for local governments to help implement the Blueprint principles and housing outcomes called for in the MTP/SCS
- Support to understand recent housing legislation and requirements for local governments
- Housing-related education and outreach materials
- A potential shared housing "circuit rider" – a housing planning specialist, who would help local jurisdictions with their housing issues at a regionally subsidized billing rate

All of these potential solutions will be examined by SACOG as part of the MTP/SCS update.

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